

EAB Navigate Resource Guide: How to Enter Reports for Campaign Appointments

Part 1: Reporting on Appointments

This section indicates how to enter your appointment reports to associate the appointments with the campaign.

1. Login to <https://umw.campus.eab.com> using your UMW single sign-on
2. Click on the **Appointments** tab, located near the top of your profile page

Staff Home ▼

Students **Appointments** My Availability Appointment Requests

Upcoming Appointments

Care Unit: All Care Units ▼ ⓘ

Actions ▼

3. At the top is the list of your **Upcoming Appointments**, scroll past this section to the **Reporting** section

Reporting

Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All Care Units ▼

Actions ▼ Show Cancelled

<input type="checkbox"/>	DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	1/1 07/07/2023 10:00am - 10:25am ET	First-Year Orientation Advising	N/A			25 min	Report Details	Details
<input type="checkbox"/>	1/1 07/07/2023 10:00am - 11:00am ET	First-Year Orientation Advising	N/A			60 min	Not Yet.	Details
<input type="checkbox"/>	1/1 07/07/2023 9:00am - 9:15am ET	First-Year Orientation Advising	N/A			15 min	Report Details	Details
<input type="checkbox"/>	1/1 07/07/2023 9:00am - 10:00am ET	First-Year Orientation Advising	N/A	Hello ! my preferred name is Hidaya (he-die-yah),...		60 min	Not Yet.	Details

- If you see a student's name only once with the green **Report Details** – then you everything is good to go – keep doing what you are doing 😊
- If you see something like the picture on the first page where the students are listed twice with only one green **Report Details** and the other lines says “**Not Yet**” – the appointment report isn't being associated correctly with the campaign and you are probably going directly to the student's EAB page and reporting on your appointment there.
- After your appointment do not go to the student's EAB page – follow the steps above: go to your **Home** page and click on the **Appointments** and then scroll down to **Reporting**. Find the student that you met with and click the check box for that student's appointment.

Reporting

Recent Appointments

Recent Reports You Created

Recent Appointments

Care Unit: All Care Units

Actions

Show Cancelled

		DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	1/1	07/07/2023 10:00am - 10:25am ET	First-Year Orientation Advising	N/A			25 min	Report Details	Details
<input type="checkbox"/>	1/1	07/07/2023 10:00am - 11:00am ET	First-Year Orientation Advising	N/A			60 min	Not Yet.	Details
<input type="checkbox"/>	1/1	07/07/2023 9:00am - 9:15am ET	First-Year Orientation Advising	N/A			15 min	Report Details	Details
<input type="checkbox"/>	1/1	07/07/2023 9:00am - 10:00am ET	First-Year Orientation Advising	N/A	Hello ! my preferred name is Hidaya (he-die-yah),...		60 min	Not Yet.	Details

- ## Reporting

- This will bring up the appointment report for that student which has the appointment details automatically filled in and then you just need to enter **Major Interest** and the **Appointment Summary** and the click **Save this Report** at the bottom of the screen.

Cancel

Save this Report

Part 2: Associating Appointments with Campaign

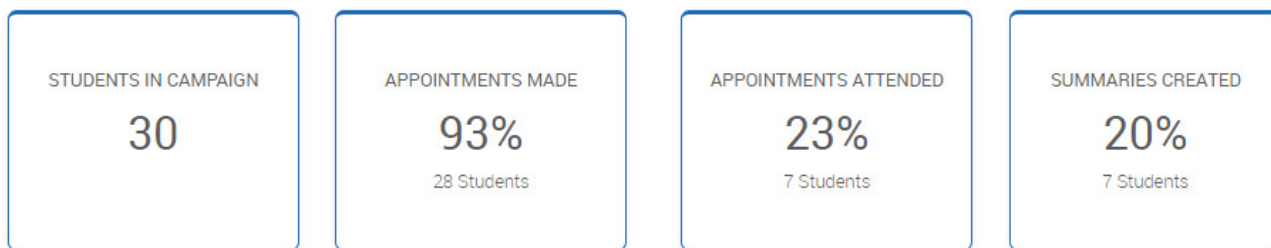
This is only needed if your Reporting Tab is showing two appointments for the same student – like the picture on the first page

When you open your campaign and click on the **Summaries Created** tab is blank – follow the instructions below to fix this issue.

1. Click on the **Eligible Appointments** tab

Appointment Campaigns > July 2023 FY Advising (Dasgupta Sections

07/03/2023 - 07/28/2023



Appointments Scheduled	Some Appointments Scheduled	Appointments Not Yet Scheduled	Summaries Created	Eligible Appointments
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Actions ▾

2. Click on the square box in the gray heading at the top – this will select all of your appointments in this list

Appointments Scheduled	Some Appointments Scheduled	Appointments Not Yet Scheduled	Summaries Created	Eligible Appointments
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This grid will display all eligible appointments that have been scheduled outside of the campaign link. Eligible appointments only include appointments containing the same care unit, location, service, and students selected when creating the campaign.

Actions ▾					
<input type="checkbox"/>	INDEX	DATE	STUDENT	ORGANIZER	SERVICES / COURSE
<input type="checkbox"/>	1	07/03/2023 10:00am ET		Hillyard, Dr. Wes	First-Year Orientation Advising
<input type="checkbox"/>	2	07/03/2023 11:00am ET		Hillyard, Dr. Wes	First-Year Orientation Advising

3. Then click on the **Actions** drop-down menu and select **Associate Appointments**

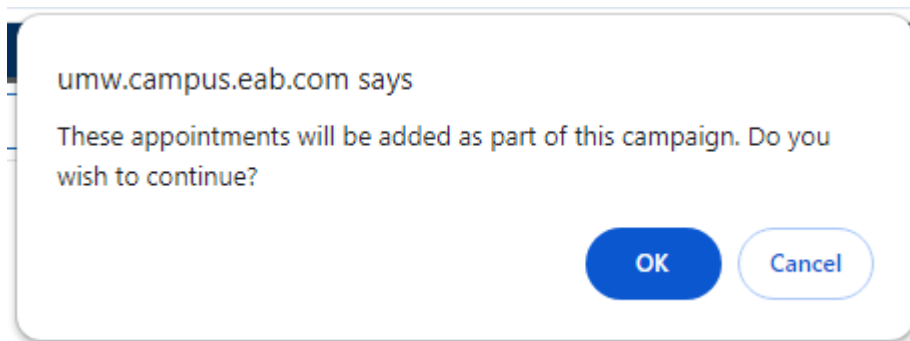
Appointments Scheduled Some Appointments Scheduled Appointments Not Yet Scheduled Summaries Created **Eligible Appointments**

This grid will display all eligible appointments that have been scheduled outside of the campaign link. Eligible appointments only include appointments containing the same care unit, location, service, and students selected when creating the campaign.

Actions ▾
Associate Appointments

			STUDENT	ORGANIZER	SERVICES / COURSE
<input checked="" type="checkbox"/>	1	07/03/2023 10:00am ET	[REDACTED]	Hillyard, Dr. Wes	First-Year Orientation Advising
<input checked="" type="checkbox"/>	2	07/03/2023 11:00am ET	[REDACTED]	Hillyard, Dr. Wes	First-Year Orientation Advising

4. EAB will then pop up the following window – click Okay



5. This will then populate all of your appointment reports under the **Summaries Created** tab correctly – you don't have to do this if you are doing the reporting correctly in Step 1, but if you meet with a student "outside" of the campaign then you will have to do this and report on appointment directly from the student's EAB page.

If you have any questions – please let us know.

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