Reports: Appointments

Appointments Report

This report shows any appointment created by a user in Navigate. A single row in the Appointments Report represents a single appointment instance with the Appointment Date within the date range chosen. If the appointment instance is a group appointment, you see a single row per student in the appointment. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointments in the date range chosen.

The data in the Appointments report is Care Unit-specific. To view and access the data, users must have a role with access to a given Care Unit and the ability to view appointments within that Care Unit. They also need the **View Appointments Report** permission to see the link to the report.

To Generate an Appointment Report

1. Open Reports by clicking the icon in the sidebar.

2. Select **Appointments** from the list on the main screen and click on its title. Note that you only see Reports you have permissions to use.

3. Set the Activity filters. This is typically a timeframe and conditions on the entire data set, like *Include Enrolled Students Only* or *Care Unit*. The timeframe's actual date range shows once you set it, unless you are creating a custom timeframe.

4. Set the Student filters. These filters parallel the filters in the Advanced Search; see the Advanced Search article for more information about these filters.

5. Set any final conditions (e.g. the *Include Inactive* checkbox) and click **Search** to generate.

Report Actions

Users can take action on any report by opening the **Actions** menu in the report results. Below is an example of the Actions menu for the Appointments report.
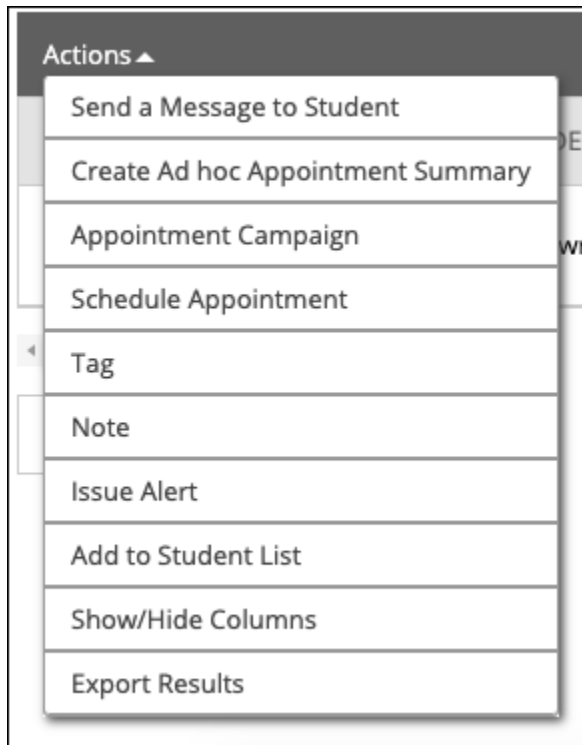
While most reports have some unique actions, all reports have some similar actions. Unique actions are listed in the Data Dictionary article for the report.

The actions that every report has are listed below.

Send a Message

Sends a message to the students selected by email or text.

Tag

Adds a tag to the students selected.

Note

Adds a note to the students selected.

Add Ad-hoc Appointment Summary

Opens an Appointment Summary Report for the students selected.

Appointment Campaign

Creates an Appointment Campaign using the selected students.

Schedule Appointment

Creates an Appointment between the students and the person who ran the report.

Add to Student List

Adds the selected students to a Student List.

Show/Hide Columns

Lets the userchoose the columns to show in the report results and export.

Export Results

Exports the report results to a CSV file. If you have hidden columns, the export maintains those choices.

Saving a Report

Saved Reports give Navigate staff users the ability to save student and activity filters for a particular report to which they have access, much like a Saved Search. This allows users to re-run the search quickly and efficiently without having to reselect the filters each time they access the report. Downloaded Reports will continue to be available in the Download Center for 7 days.

To save a report, run your report as usual and then click the **Save** button on the results page.
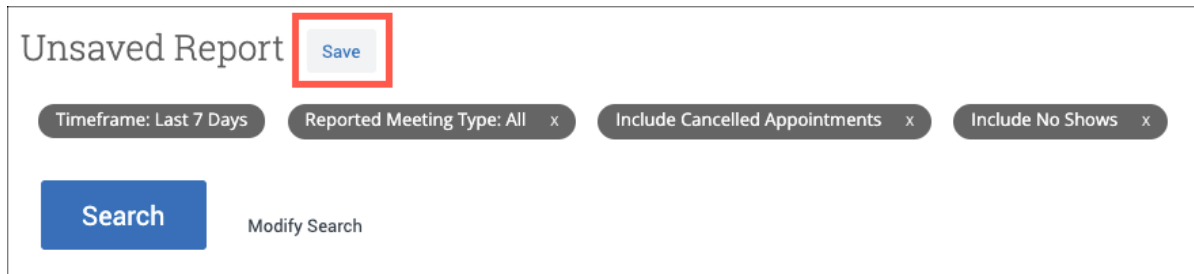
After creating a saved report, the report will appear in the **Lists & Searches** tab.

Scheduled Reports

Once you save a report, you can then schedule it to be rerun. This functionality is on the **Lists & Searches** tab. When you navigate to the **Saved Reports** table, you can click **Configure Schedule** to schedule a report.
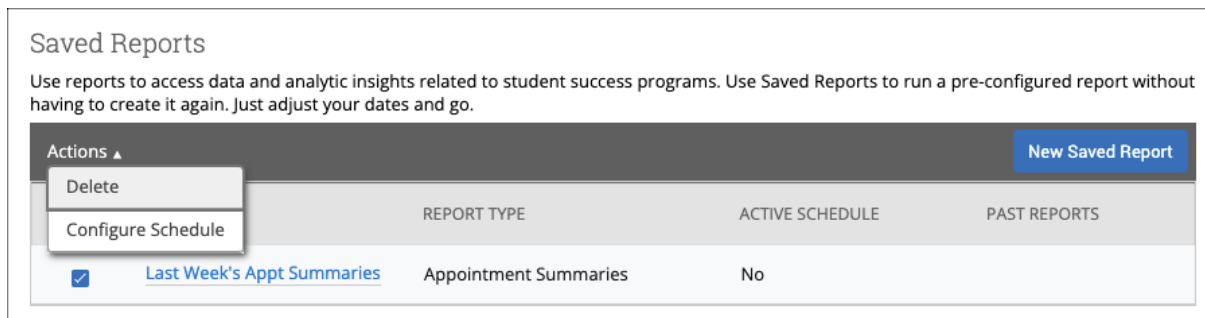
Reports can be scheduled to be delivered daily, weekly, or monthly. You can only create one schedule per Saved Report; for example, you cannot create a schedule that sends notifications on Monday and Wednesday weekly.

Once a schedule is configured, users will be notified via email when their report is ready to be run or exported.

Scheduled Reports can be retrieved in two ways.

You can click **Run Report** from the notification email, which opens Navigate (user must authenticate first) and automatically runs the report with the saved filters. This is best if you want to take action from Navigate on your report results.

If you select **Export to Download Center**, you are taken to the Download Center after successfully authenticating with Navigate. You can then download the report data. This is best if you are looking to do deeper analysis on the data.

Note. Links within the Scheduled Report email are user-specific, so forwarding a Scheduled report to a colleague will not work.