Navigate360: Viewing Appointment Campaign Reports

Appointment Campaigns let staff reach out to specific student populations and encourage them to schedule appointments.

1. Navigate to the appointment campaign reporting tool

Activity Filters

- Click the Reporting 📻 icon from the navigation menu on the left side of the screen.
- Click the Standard Reports tab
- o Click here to revert to V2 reporting
- In the Appointment/Visit Reports box on the left side of the screen, click Appointment Campaigns.

My Saved Reports Standard Reports	
itandard Reports	
elect a report type below to customize and run a new report. To save a report for future use, click save from the report results.	
O You Are Currently Viewing the V3 Standard Reports	
These reports have improved infrastructure, advanced filtering options, and new grid styling and functionality. These reports will produce the same results as our V2 reports. Should you need to access old V2 reports for	iny reason, click <u>here</u> .
Reminder: The V2 reports will be deprecated on a later date, to be announced.	

2. Define the report to be created

- Under Activity Filters, select Timeframe and Period. Click inside the Appointment Campaigns box to select a specific appointment campaign.
- Click *Search*.

	Saved Reports -	Saved Reports -			
 3. Export the report When a list of students is generated, click <i>Actions</i> at the top of the search result box. From the drop-down menu, click <i>Export Results</i>. In the <i>Export Result</i> checkboxes to select 	Timeframe Last Care Units All Filter by Location All Filter by Service	Period	Y Y	03/25/2024–03/31/2024 Appointment Campaigns: All	
	s Column wind		, use the	I	Actions ▲ Send a Message to Student Create Ad hoc Appointment Summ Create an Appointment Campaign

• Click *Export*.

Schedule Appointment

Issue Notification or Referral

Add to Student List

Show/Hide Columns

Add To-Do

Tag

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- A pop-up will appear in the bottom right of the screen when the export is ready. In that pop-up box, click *Download Center for Reports*.
- Click the name of the file to download. It will download to the location you have set in your browser.
- The download center can also be accessed by clicking *Download Center for reports* under *Quick Links* on the staff homepage. To return to the homepage click the Home icon in the left navigation menu.

Ø	New Appointment Campaigns Report ready! × Your Appointment Campaigns Report has been downloaded. A copy is available in the Download Center for Reports.
Quic	k Links
Take	me to
Schee	dule a General Event
Recor	rd Class Attendance
Mana	g <u>e Assignments</u>
Schoo	ol Information
Down	load Center for Reports
Camp	paigns
Appol	Intment Campaigns

Travel Letters