Reporting Page

Utilizing Report Options to Track Advising Data

A challenge many advisors often face is attempting to provide data around their advising appointment details – how many students are they meeting with, how long are they meeting with students, etc. With the BHSC, it is easy for advisors to gain this kind of data from the Reporting page – Advisor Reports. **Please note: In order for this data to be available, advisors must be minimally entering their advising interactions via Advising Reports.**

1. **Step One:** Within the platform from the left-hand fly out menu, navigate to the Reporting page.
   
   □ From the Reporting page, navigate to the Advisor Appointments link found within the Advisor Report section.

   ![Advisor Reports](image)

   - Advisor Appointments
   - Advisor Appointment Details
   - Students With/Without Advising Appointments
   - Advisor Summaries
   - Advisor Detail Summaries

2. **Step Two:** Within the Advisor Appointment Report, select the criteria:
   
   □ **Begin Date – End Date** – enter the date range for the time period on which you’re reporting
   
   □ **Advisor for Appointment** – enter the name of advisor; TIP – entering last name seems to work best.
   
   □ Click Search.
   
   □ The report will spin/take a while to load the data.

3. **Step Three:** Once the output of the report is available, click the checkbox on the header to select all of the details within the report.
   
   □ Under the dropdown Action, select **Export to Excel.**
A popup box will appear when the Excel report is ready – click the link provided for Download Center for Reports.

4. **Step Four:** Click on the link for the Advisor Appointment Report.

- Manipulate data within Excel as desired.

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### University of Delaware

**Advisor Appointments Report**

10/03/2016 to 11/05/2016

<table>
<thead>
<tr>
<th>Begin date time</th>
<th>Duration</th>
<th>Reported duration</th>
<th>Location</th>
<th>Appointment type</th>
<th>Advisor name</th>
<th>Student ID</th>
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