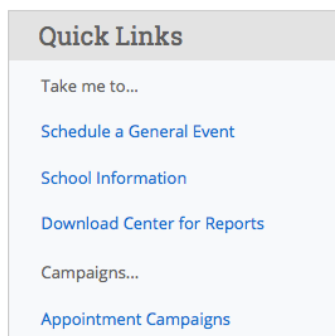


Initiating an Appointment Campaign in EAB Navigate

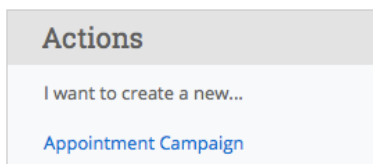
Preparing Campaign Details

Navigate URL: <http://uvm.campus.eab.com>

1. On the Staff Home (login page), select Appointment Campaigns from the Quick Links menu on the right-hand side of the page.



2. Then, under Actions select Appointment Campaign again.



3. Complete the “Define Campaign” fields:

Campaign Name: Enter your college/school followed by “Spr 2021 Course Registration Advising,” underscore and your last name. For example, the Campaign Name should look like this, ***CEMS Spr 2021 Pre-Course Reg Advising_Warrington.***

The **Care Unit, Location, Service and Begin and End Date** must match with the details included in Your Availability.

- Care Unit = Advising,
- Location = Your College/School
- Service = Spr 21 Course Registration Advising

Appointment Limit: This field refers to the number of appointments that you want each student included in the campaign to be able to schedule with you.

Appointment Length: Adjust this field to reflect how long you would like to meet with each student. Students will be able to schedule back-to-back appointments with you. You can set the length to 30 minutes and then, choose to hold meetings for 20 minutes with a 10 minute buffer in between; you will simply have to plan for this during each meeting.

Slots Per Time: This indicates the number of students who are able to sign up to meet with you during any appointment time. If you want to hold group advising sessions, you would adjust this number to the ideal size for a group.

Staff Reminders and Recipient Reminders: Check each box if you would like to receive notifications about scheduled appointments through the campaign (i.e. email) and how you’d like students to receive appointment reminders (i.e. email or text/SMS). This will provide reminders of when appointments are forthcoming.

Scheduling Window: There are the dates in between which students will be asked to register for an appointment.

New Appointment Campaign

1 Define Campaign — Select Recipients — Select Staff — Compose Nudges — Verify and Start

Define Campaign

Set up your campaign. Specify your appointment details and timing.

Campaign Configurations

* Campaign Name: Instructions or Notes for Landing Page:

* Care Unit: * Location:

* Service:

Appointment Configurations

* Appointment Limit: * Appointment Length:

* Slots Per Time:

☐ Allow Scheduling Over Courses

Staff Reminders: ☐ Email ☐ Text Recipient Reminders: ☐ Email ☐ Text

Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

* Start Date: * End Date:

TIMELINE

Objective
Pending Setup...

Recipients
Pending Setup...

Staff
Pending Setup...

Nudge 1
Pending Setup...

Campaign Ends
Pending Setup...

Cancel Save and Exit Continue >

- Choose to invite all of your assigned advisees OR another population found through the Advanced Search filters to participate in the campaign. On the next screen, you can select specific students, if there are any students listed with whom you do not need to meet.

CEMS Spr 2020 Pre-Course Reg Advising_Warrington

Add Students To Campaign

Invite All My Assigned Students

Advanced Search

To select all advisees, click on the open check box next to Name above the list. To remove advisees, click on the check boxes next to their names and then select Remove Selected users under the Actions menu.

- Select yourself as the Organizer of the campaign. (You should see your campaign availability listed on the right hand side of the screen. If you do not see your availability, save the campaign and go back to set up the dates and times that you can meet with students.)
- On the next page, you can set up the campaign message and nudges to students. To set up the initial message click **Add Nudge**. This will be your first message to students. You can select however many additional nudges to be sent after to student that have not scheduled a meeting.


Appointment Campaign: Graduation Checklist

[Define Campaign](#) — [Verify Recipients](#) — [Select Staff](#) — **Compose Nudges** — [Verify and Start](#)

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.


[+ Add Nudge](#)

 There are currently no nudges

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipients scheduling all campaign appointments. The success message is for communication purposes only and will not be included in campaign metrics.

[+ Add Success Message](#)

 No success message specified for this campaign.

TIMELINE

- Objective: Schedule Appointment(s)**
By Mon 03/28/2022
- Recipients**
4
- Staff**
2
- Nudge 1**
Pending Setup...
- Campaign Ends**
Mon 03/28/2022

[< Back](#)
[Save and Exit](#)
[Support](#)

- After clicking Add Nudge, View and adjust the message that will go to students and select the send date. *You may change the message subject or details within the body of the message. **Be sure to leave the schedule link.***

Appointment Campaign: Graduation Checklist

[Define Campaign](#) — [Verify Recipients](#) — [Select Staff](#) — **Compose Nudges** — [Verify and Start](#)

Add Nudge

*** Subject**
 {\$student_first_name}, Schedule an Advising appointment

*** Message**

Please Schedule Your Advising Appointment.
Hello {\$student_first_name}:
 Please schedule an appointment for Mandatory Advising at Central Advising Building. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.
 {\$schedule_link}
 Thank you!

Available Merge Tags

{\$student_first_name}	Inserts the student's first name
{\$student_last_name}	Inserts the student's last name
{\$schedule_link}	Inserts a link to schedule the appointment


Add Attachment:

[Choose File](#) | No file chosen

*** Send Date**
 Monday, March 14th 2022

Preview Email

Andrew, Schedule An Advising Appointment



Please Schedule Your Advising Appointment.


Hello Andrew:

Please schedule an appointment for Mandatory Advising at Central Advising Building. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

Thank you!

Any Additional Questions?
 Please contact your assigned Advising Center for additional information regarding this email.



[Cancel](#)
[Save Nudge >](#)

At the bottom of the page, add an attachment to the email, if you'd like. *(The year on the Preview Landing Page does default to 2014. This is a sample of what students will see when selecting a time, and it does not reflect the times that you have established for the campaign.)*

After saving the initial Nudge, you can add additional nudges to automatically message students who have not scheduled an appointment already in the campaign, but this will not message those with an appointment.

- After completing all of the desired Nudges, you can now create an optional Success Message if you would like a thank you to be emailed to students after registering for an appointment. This is filled out in the same way as the nudges.

Appointment Campaign: Graduation Checklist

[✓ Define Campaign](#) —
 [✓ Verify Recipients](#) —
 [✓ Select Staff](#) —
 [✓ Compose Nudges](#) —
 [5 Verify and Start](#)

Add Success Message

Subject: Thank You For Scheduling Your Appointment

Message: Hi {{student_first_name}}, Thank you for scheduling your appointment. Thank you!


Available Merge Tags

{{student_first_name}}	Inserts the student's first name
{{student_last_name}}	Inserts the student's last name

Add Attachment: [Choose File](#) | No file chosen


Preview Email

Thank You For Scheduling Your Appointment



Hi Andrew,
Thank you for scheduling your appointment.
Thank you!

Any Additional Questions?
Please contact your assigned Advising Center for additional information regarding this email.

 NAVIGATE

[Cancel](#) [Save Success Message >](#)

9. The final page allows you to see the details of the campaign. Click Start Campaign if everything is correct.

Appointment Campaign: Graduation Checklist

[✓ Define Campaign](#) —
 [✓ Verify Recipients](#) —
 [✓ Select Staff](#) —
 [✓ Compose Nudges](#) —
 [5 Verify and Start](#)

Verify & Start

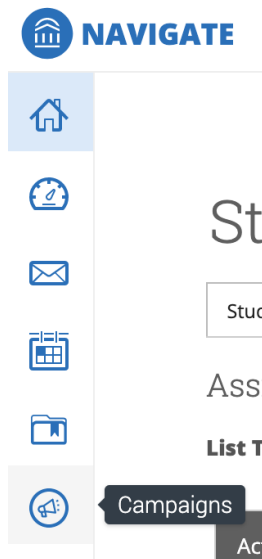
Define Campaign	Name: Graduation Checklist Instructions or Notes for Landing Page: Make sure you get your diploma and final transcript! Meet with your advisor now. Care Unit: Advising Location: Central Advising Building Service: Mandatory Advising Appointment Limit: 1 Appointment Length: 30 mins Slots Per Time: 3 Scheduling Window: 03/14/2022 - 03/28/2022 Allow Scheduling Over Courses: No Staff Reminders: Email - Yes Text - Yes Recipient Reminders: Email - Yes Text - Yes	
Recipients	View 4 recipients	
Staff	View 2 staff	
Nudge 1	Send Date: Mon 03/14/2022 Subject: {{student_first_name}}, Schedule an Advising appointment Email Preview: View Email	
Nudge 2	Send Date: Wed 03/23/2022 Subject: {{student_first_name}}, Last Chance to Schedule Email Preview: View Email	
Success Message	Subject: Thank You For Scheduling Your Appointment Email Preview: View Email	

[← Back](#)

[Save and Exit](#)
[Start Campaign](#)

Accessing an Active Campaign

1. Use the Campaigns tab in the navigation bar (left hand side of Staff Home/login page).



2. Use the Campaigns tab in the navigation bar to see which students have made appointments, who still needs to schedule an appointment, which reports (or notes) have been entered for this campaign and how many eligible appointments are still available.

10/04/2019 - 10/04/2019

Appointments Made	Appointments Not Yet Made	Reports Created	Eligible Appointments
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Actions ▾

<input type="checkbox"/>	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	APPT CREATED ON
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No appointments have been created for this campaign.

3. By clicking in to the Appointments Not Yet Made tab, you can send a reminder email to students who still need to set up an appointment. Select which students should receive the message, go to Actions and click on Resend Appointment Request.

10/19/2020 - 11/20/2020

Appointments Made	Appointments Not Yet Made	Rep
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Actions ▴	
<input type="checkbox"/>	Resend Appointment Request
<input type="checkbox"/>	Send a Message
<input type="checkbox"/>	Add Note
<input type="checkbox"/>	Add Tag

For more questions, please contact the Navigate support team at: StudentSuccess@uvm.edu