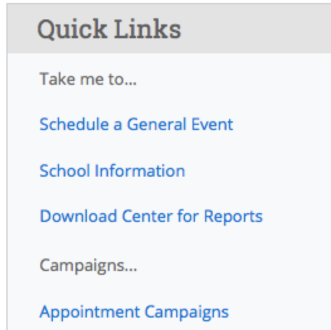
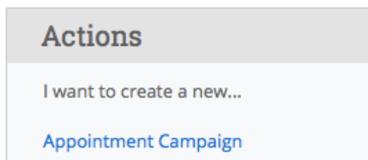
Initiating an Appointment Campaign in EAB Navigate
Preparing Campaign Details

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

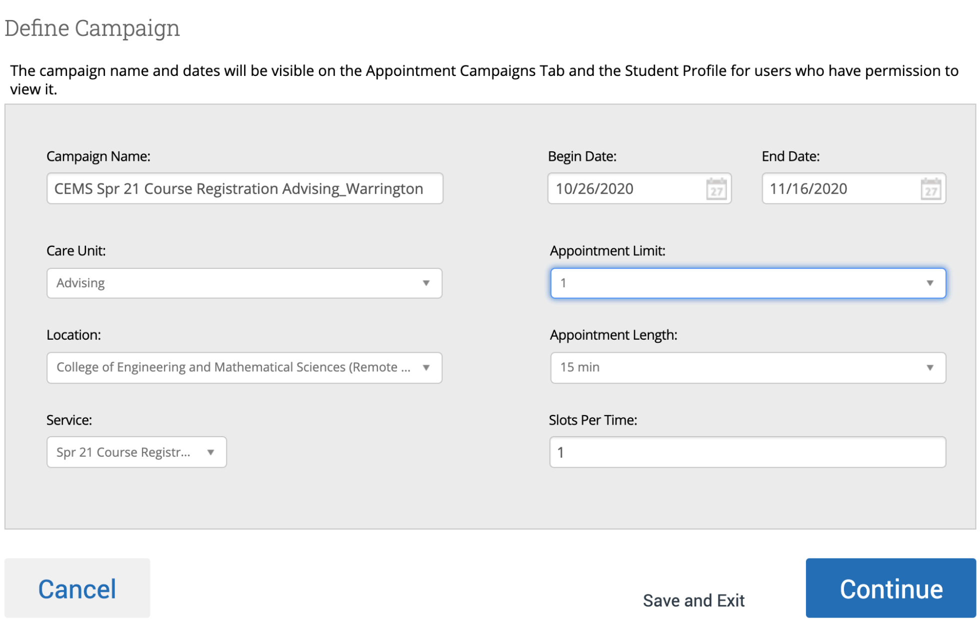
1. On the Staff Home (login page), select Appointment Campaigns from the Quick Links menu on the right-hand side of the page.



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.

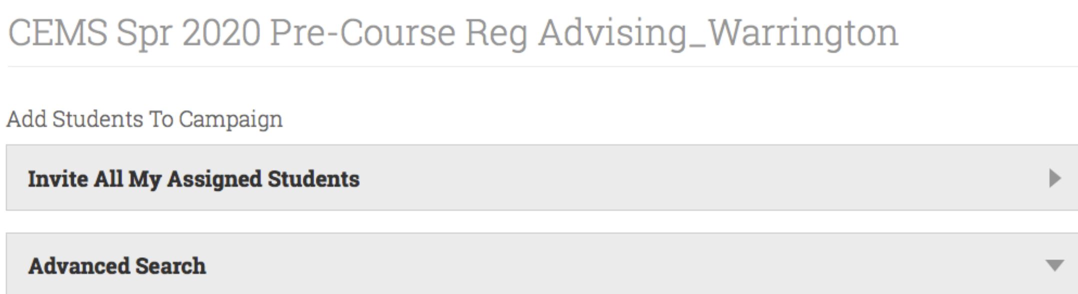
- Care Unit = Advising,
- Location = Your College/School
- Service = Spr 21 Course Registration Advising

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.

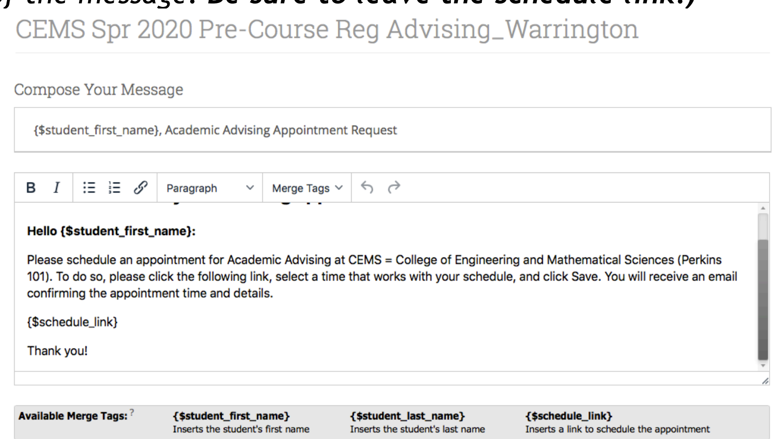
4. Choose to invite all of your assigned advisees OR another population found through the Advanced Search filters to participate in the campaign. On the next screen, you can select specific students, if there are any students listed with whom you do not need to meet.



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.

5. Select yourself as the Organizer of the campaign. (You should see your campaign availability listed on the right hand side of the screen. <u>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.</u>)

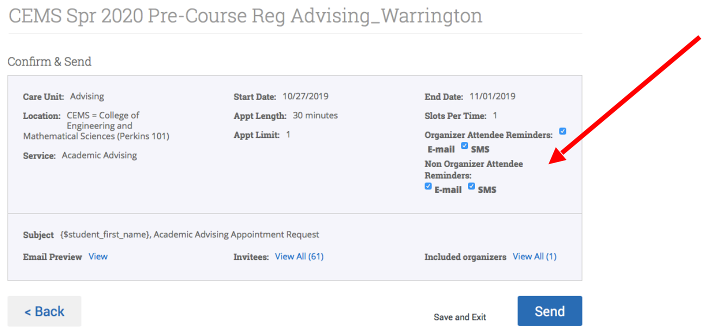
6. View and adjust the message that will go to students. *You may change the message subject or details within the body of the message. **Be sure to leave the schedule link.)***



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've established for the campaign.)*

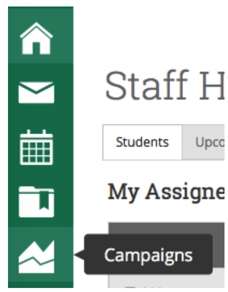
7. The final page allows you to see the details of the campaign.

   On the right-hand side, be sure to note if/how 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). (Advisors will not receive texts from the platform.)

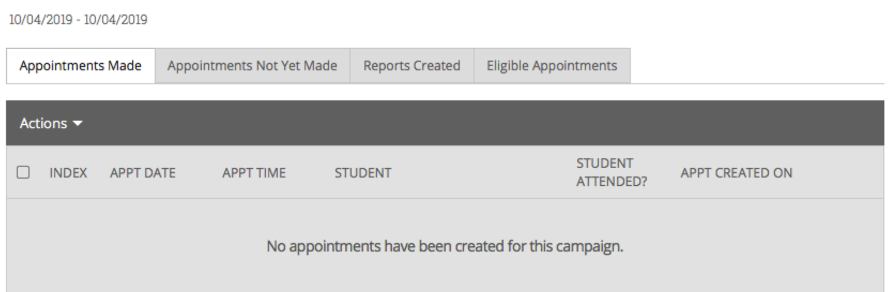


Accessing an Active Campaign

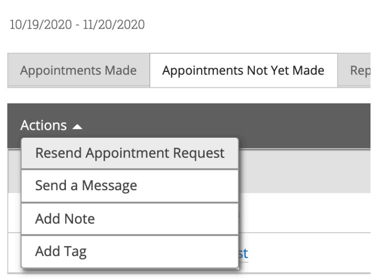
1. Use the Campaigns tab in the navigation bar (left hand side of Staff Home/login page).



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.



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.



Navigate User Support Contacts:

1. StudentSuccess@uvm.edu
2. Sarah Warrington, swarring@uvm.edu
3. Scott Pavek, rpavek@uvm.edu