Initiating an Appointment Campaign in EAB Navigate
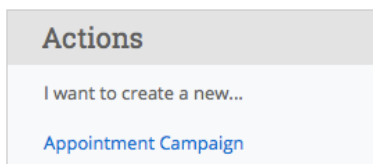*Preparing Campaign Details*

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.

Quick Links

Take me to...

Schedule a General Event

School Information

Download Center for Reports

Campaigns...

Appointment Campaigns
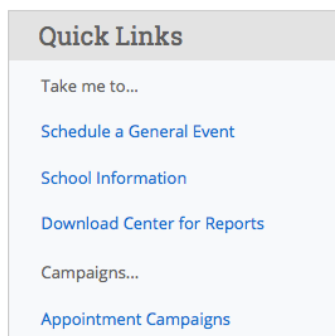
2. Then, under Actions select Appointment Campaign again.

Actions

I want to create a new...

Appointment Campaign

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.

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. 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.

7. 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.**)*

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.

8. 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

B I ≔ ≔ ⊘ Paragraph ⌄ Merge Tags ⌄ ↶ ↷

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 ›

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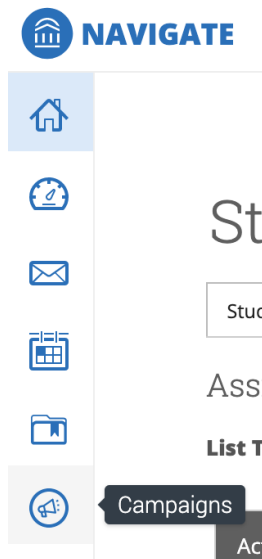
2. Use the Campaigns tab in the navigation bar to see which students have made appointments, who still needs to schedule an appointment, which reports (or notes) have been entered for this campaign and how many eligible appointments are still available.

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.

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