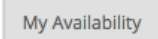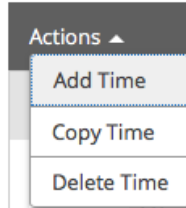# EAB Navigate Resource Guide:
How to Enter Campaign Availability and Run a Campaign

Part 1: Entering Campaign Availability

This section indicates how to enter your Campaign specific availability in order for students to schedule an appointment with you through EAB Navigate. ***You MUST enter your Campaign availability prior to defining and running a Campaign or you will not be able to assign yourself as the faculty member.***

1. Login to https://umw.campus.eab.com using your UMW single sign-on

2. Click on the *My Availability* tab, [My Availability], located near the top of your profile page

3. Under the *Available Times* section, select the *Actions* drop-box and choose *Add Time*

4. This will bring forward the *Add Availability* window wherein you enter your specific availability. (*Variations in your schedule will necessitate separate, multiple entries*)

   a. Begin by selecting the day(s) of the week when you are available to meet

   b. Then enter your time *From* and *To* availability for the days selected

   c. Next, click the *Please select a duration* drop-box, [Please select a duration ▼], to set your availability to default for all of *Spring 2019* or as specific *A Range of Dates* which you may define yourself. (*It is not recommended to select Forever as your duration option*)

   d. Select your type of availability as *Campaigns*

   e. Set your *Care Unit* to *Advising* (which will be your only option)

f.   From among your *Location* options, select ***Faculty Advisor Office***

Location

| Faculty Advisor Office | ▼ |

g.   Then select from *Services* which service(s) you desire to tie to this availability, such as ***Registration*** or ***First-Year Advising***. (*It is recommended that you select only one service at this stage for Campaigns as only one service can be selected later when you define your Campaign*)

Services

| × Registration |

h.   If desired, type in the *Special Instructions for Student* any special instructions you wish to convey. (*It is recommended you include your office location but feel free to include requests as well*)

Special Instructions for Student

> **B** *I* ≣ ≣ ↰ ↱
>
> My office is in Lee 206.8.
>
> Please bring with you your degree evaluation as well as some course registration ideas from the Open Classes page:
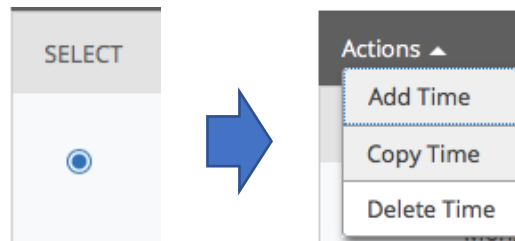>
> https://academics.umw.edu/registrar/course-schedules-and-registration/
>
> P

i.   Lastly, make sure to click the ***Save*** button, [Save] , at the bottom right of the *Add Availability* window to save your entry.

5.   Once saved, you will find your entry back in the *Available Times* section

Available Times ⓘ

Actions ▼							
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
○	Mon, Wed, Fri	9:00a-10:30a	March 04, 2019 to March 08, 2019	Faculty Advisor Office	Registration For: Campaigns	Advising	Edit

6.   If you need to enter additional Campaign availability, it is quickest to copy your newly entered time and edit some of the details. Simply click on the ***select button*** next to your entry and then click ***Actions*** and ***Copy Time***
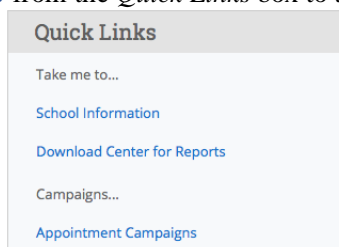
SELECT ⦿   →   Actions ▲ / Add Time / Copy Time / Delete Time

This will prepopulate a new *Add Availability* window with some of your previously selected details for ease of reentry and saving.
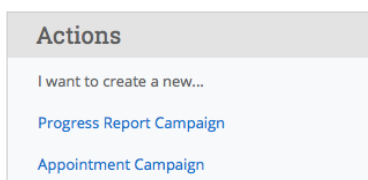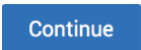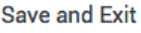
Part 2: Defining and Running a Campaign

Campaigns are designed to actively solicit a given set of students by email invitation to schedule an appointment with you. Campaigns are ideal for pre-registration advising. **If you have not yet entered Campaign specific availability, then go back to the beginning of this document and follow the steps. Without Campaign specific availability you will not be able to assign yourself as the faculty member.**

1. Login to https://umw.campus.eab.com using your UMW single sign-on

2. Click on *Appointment Campaigns* from the *Quick Links* box to the right of the page

3. Important Note: This takes you to the *(Current Term) Campaigns* page where you can view your active Campaign stats as well as select specific Campaigns for further action such as editing existing Campaigns, viewing who has made an appointment and who has not, in addition to sending additional email or text messages to students, among other options. These pages will be useful in editing and managing your Campaigns

4. To create and define a new Campaign, select *Appointment Campaigns* from the *Actions* box to the right of the page

5. Begin by entering the requisite information under the *Define Campaign* page:

   a. Enter a unique *Campaign Name*
   b. Choose *Advising* for your *Care Unit*
   c. Indicate *Faculty Advisor Office* for your *Location*
   d. Select the service type for this Campaign (*such as* ***Registration***)
   e. Set your *Begin Date* and *End Date* options
   f. Establish your *Appointment Limit* (*typically chosen as 1 to limit each student to a single appointment with you through this Campaign*)
   g. Set your *Appointment Length*
   h. Establish your *Slots Per Time* (*typically set as 1 to limit a single student to meeting with you at a given appointment time instead of multiple at once*)
   i. Click the ***Continue*** button, [Continue], to continue or the ***Save and Exit*** option, [Save and Exit], to save your progress and finish defining your Campaign later

* Helpful hints: *The location and service type you indicate here must match that which you entered for your Campaign availability as described in part one of this guide. Additionally, the date range you select here must at least overlap with the dates entered for your Campaign Availability. You can always go back and edit those entries.*

6. On the *Add Students* page, select one of two options:

   a. Either select *Invite All My Assigned Students* and click *Yes* to invite all your advisees

      I. This takes you to the *Review Students in Campaign* page where you can remove individual students from your Campaign by selecting the check-box adjacent to their name and then selecting *Remove Selected Users* from the *Actions* drop-box

   b. Or select *Advanced Search*, enter your search criteria, and click *Search* to invite a group of your own definition

   c. When finished adding students by whichever option, click *Continue*

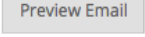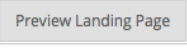7. On the *Add Staff* page, select the check-box adjacent to your name and click *Continue*.

Helpful hint: If you are unable to locate yourself to add, it is likely that no overlap exists between your Campaign availability as described in part one of this guide and the details you entered for the actual Campaign definition. You can always go back and edit those entries.

8. The *Compose Message* page allows you to personalize the email which your invitees will receive. The email imports each student's first name and provides a hyperlink taking them to the scheduling interface.

   a. Feel free to customize the email as might be helpful for your students.

   b. You may add attachments as necessary by the *Select file to attach* option located just below the email box

   Add Attachment:
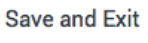
   Select file to attach

   c. Below the attachment feature you may select between two tabs to *Preview Email*, Preview Email , as a student would receive it and *Preview Landing Page*, Preview Landing Page , showing what a student would view after clicking on the imbedded hyperlink

   d. Click *Continue* when finished

9. Lastly, the *Confirm & Send* page provides an overview of your Campaign's definition. (*It is recommended to let the email and SMS defaults alone as the system will send email and text message appointment reminders after a student has scheduled with you*)

   Confirm & Send

Care Unit: Advising	Start Date: 03/04/2019	End Date: 03/18/2019
Location: Faculty Advisor Office	Appt Length: 5 minutes	Slots Per Time: 1
Service: Registration	Appt Limit: 1	Organizer Attendee Reminders: ☑ E-mail ☑ SMS
		Non Organizer Attendee Reminders: ☑ E-mail ☑ SMS

Subject {$student_first_name}, Schedule an Advising appointment		
Email Preview View	Invitees: View All (25)	Included organizers View All (2)

   Click the *Send* button, Send , to finish and send or the *Save and Exit* option, Save and Exit , to save your progress and finish defining your Campaign later