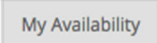


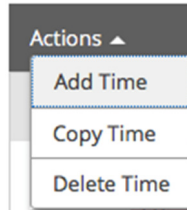
# EAB Navigate Resource Guide:

## 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, , 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

When are you available to meet?

Mon	Tue	Wed	Thu	Fri	Sat	Sun
-----	-----	-----	-----	-----	-----	-----

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

From	To
8:00am	5:00pm

- c. Next, click the **Please select a duration** drop-box, , and specific **A Range of Dates** which you may define yourself. (e.g. July 11 to July 29)

How long is this availability active?

A Range of Dates

- d. Select your type of availability as **Campaigns**  
What type of availability is this?

Appointments	Drop-ins	Campaigns
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- e. Set up *Meeting Type* as **Virtual**

Meeting Type

Virtual

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

Care Unit

Advising

- g. From among your *Location* options, select **Academic Services – Summer Orientation (Virtual)**

Location

Academic Services - Summer Orientation (Virtual)

- h. Then select from *Services* select ***First-Year Orientation Advising***.

Services

- i. Add your Zoom link URL into the box titled ***URL/Phone Number***

URL / Phone Number

- j. If desired, type in the *Special Instructions for Student* any special instructions you wish to convey. (See example below....you might want to repeat you Zoom link URL here )

Special Instructions for Student

**B I** | | | |

if you need to cancel or change your appointment, please email [abarton@umw.edu](mailto:abarton@umw.edu) or call 540-654-1010. Please bring a paper and writing utensil to the appointment with you.

In advance of your advising appointment, please review your Fall schedule in Banner (~~seperate~~ <sup>separate</sup> email with instructions on how to do this was sent to you) as we will be discussing your Fall schedule during our upcoming meeting.


Zoom link|

- k. Please do not make any changes to the final section: ***Will you be meeting with multiple students?***

Will you be meeting with multiple students?

*These settings will not be used for kiosk and campaign purposes.*

Max Number of Students per Appointment

- l. Lastly, make sure to click the ***Save*** button, , 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 ▾								
<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE
<input type="checkbox"/>	Mon, Wed, Fri	9:00am - 3:00pm	July 11, 2022 to July 29, 2022	Academic Services - Summer Orientation (Virtual)	First-Year Orientation Advising For: Campaigns	Advising	No	Virtual <a href="#">Upcoming/Edit</a>

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***




This will prepopulate a new *Add Availability* window with some of your previously selected details for ease of reentry and saving.

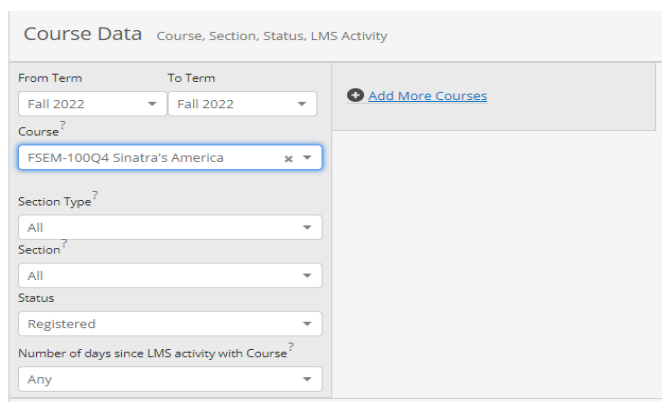
## Part 2: Defining and Running a Campaign

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. From your EAB homepage, locate and click on the **Advanced Search icon**  on the left-hand side of the screen

3. Once in Advance Search, locate the **Course Data** dropdown tab – here you will define the from term and to term as Fall 2021 and then locate your assigned FSEM course(s) from the drop-down list. Section Type, Section, and Status can remain as is



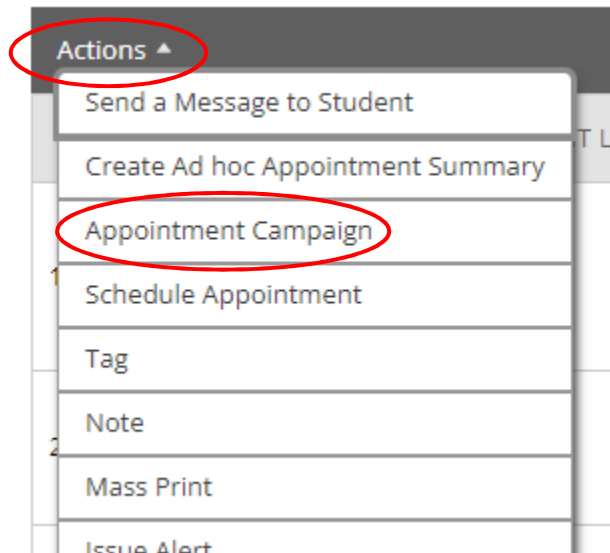
Search

4. Once the advance search parameters are defined (in the Course Data section) click at the bottom of the screen
5. This will generate your list of students (Banner IDs are blocked on the screen shot below)

Actions ▾										
<input type="checkbox"/>	NAME	STUDENT ID	STUDENT LIST	CUMULATIVE GPA	MAJOR	ASSIGNED STAFF	SUPPORT NEEDED TO PERSIST	CLASSIFICATION	CATEGORY	RA
1.	<input type="checkbox"/> <a href="#">Beiffuss, Gabrielle</a>	[REDACTED]			Undeclared Undergrad. Major	Unknown		Freshman	Fall 2022 Advising Hold,First Term Fall 2022,First Year Student,Off-Campus,Undeclared	Wh
2.	<input type="checkbox"/> <a href="#">Brookman, Juliette</a>	[REDACTED]			Undeclared Undergrad. Major	Unknown		Freshman	Fall 2022 Advising Hold,First Term Fall 2022,First Year Student,Undeclared	Wh
3.	<input type="checkbox"/> <a href="#">Brooks, Kennedy</a>	[REDACTED]			Undeclared Undergrad. Major	Unknown		Freshman	Fall 2022 Advising Hold,First Term Fall 2022,First Year Student,Undeclared	Bl: An
4.	<input type="checkbox"/> [REDACTED]	[REDACTED]			Undeclared				Fall 2022 Advising Hold,First Term Fall	


\*\*\* If you want to be sure that this list captures everyone in the respective FSEM(s), we will also provide a list of all students sorted by FSEM. This list will be shared via email and will be pulled directly from Banner.

6. Check the “NAME” box (circled in red in the above image) to select all of the students on the list. Then select **Actions** and **Appointment Campaign**



7. Begin by entering the requisite information under the *Define Campaign* page:
  - a. Enter a unique **Campaign Name** (e.g. Summer 2022 FY Orientation Advising)
  - b. Choose **Advising** for your *Care Unit*
  - c. Indicate **Academic Services – Summer Orientation (virtual)** for your *Location*
  - d. Select the service type **First-Year Orientation Advising**
  - e. The **Appointment Configurations** are already preset but can be changed
    - a. Establish your *Appointment Limit* (typically chosen as **1** to limit each student to a single appointment with you through this Campaign)
    - b. Set your *Appointment Length* (this should be 1 hour in order to provide a 30 minute of buffer time between appointments)
    - c. 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)
  - f. Under *Scheduling Window*, set your **Start Date** and **End Date** options
  - g. Click the **Continue** button, to continue or the **Save and Exit** option, 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.*

8. On the *Review Students* page, click  as the students are already pulled into the campaign via the advance search you just performed
9. On the *Add Staff* page, select the check-box adjacent to **your name** and click **Continue**. Please do not select any staff member other than yourself

\*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.*


10. The **Compose Nudge** 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.

#### Compose Nudges

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

- a. After clicking the [+ Add Nudge](#) a Compose Message box will appear

Compose Message

\* Subject

{student\_first\_name}, Schedule an Advising appointment

\* Message

**B I** [List] [Link] [Image] Heading 2 Merge Tags [Undo] [Redo]

**Appointment.**

**Hello {student\_first\_name}:**

Please schedule an appointment for First-Year Orientation Advising at Academic Services - Summer Orientation (Virtual). 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\_name} Inserts the first name and last name of the student

Preview Email

**Andrew, Schedule An Advising Appointment**



Please Schedule Your Advising Appointment.

**Hello Andrew:**

Please schedule an appointment for First-Year Orientation Advising at Academic Services - Summer Orientation (Virtual). 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](#)

You can also copy and paste this address into your web browser.  
https://umw.campus.eab.com/a/123456

Thank you!

- b. Feel free to customize the message as it might be helpful for your students by changing the **Message** text – the preview of your changes will show in the **Preview Email**. Please leave the merge tags.
- c. You may add attachments as necessary by the **Choose File** option

Add Attachment:

 [Choose File](#) No file chosen

- d. Select what **Send Date** that you want the student to receive the email

\* Send Date ⓘ

Friday, July 1st 2022

- e. Click [Save Nudge](#) when finished and then click [Continue](#) if you don't want to send out the optional **Success Message** that students will receive after meeting with you.

11. Lastly, the **Verify and Start** page provides an overview of your Campaign's definition.

## Verify & Start


Campaign Summary		
<b>Define Campaign</b>	Name:	summer 2022
	Care Unit:	Advising
	Location:	Academic Services - Summer Orientation (Virtual)
	Service:	First-Year Orientation Advising
	Appointment Limit:	1
	Appointment Length:	30 mins
	Slots Per Time:	1
	Scheduling Window:	06/21/2022 - 07/05/2022
	Allow Scheduling Over Courses:	No
	Staff Reminders:	Email - Yes   Text - Yes
	Recipient Reminders:	Email - Yes   Text - Yes
<b>Recipients</b>	<a href="#">View 16 recipients</a>	
<b>Staff</b>	<a href="#">View 1 staff</a>	
<b>Scheduled Nudge</b>	Send Date:	Fri 07/01/2022
	Subject:	(\$student_first_name), Schedule an Advising appointment
	Email Preview:	<a href="#">View Email</a>

Click the [Start Campaign](#) button, to finish and send or the *Save and Exit* option, to save your progress and finish defining your Campaign later

## Part 3: Returning to check on the campaign and resend the invitation

Once the campaign is sent, there is nothing more you need to do; however, you should return to the campaign to check on the status on July 7 and then again on July 19. The instructions below will show you how to easily resend the campaign to any students who has not yet made their advising appointment.

**Please communicate the names of anyone who has not yet made an appointment by July 17 to [advise@umw.edu](mailto:advise@umw.edu) Academic Services and/or Admissions will assist with following up.**

1. Login to <https://umw.campus.eab.com> using your UMW single sign-on
2. From your home page, click on the Campaigns button on the left screen side menu 
3. Then select the *Appointment Campaigns* link

## Campaigns

### Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

#### Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New](#)

4. This will then direct you to the list of your **Appointment Campaigns** (past and present), with the most recent listed first. You can simply click on the campaign to open it up

## Appointment Campaigns

[View All Campaign Types](#)

Filter by care unit: 

All care units

NAME	STATUS	RECIPIENTS	APPTS SCHEDULED
<a href="#">Summer/Fall 2022 Advising</a> ADVISING	Draft	16	

5. Once in the campaign, you can see a list of students with appointments scheduled, appointments not yet scheduled, etc... click on **Appointments Not Yet Scheduled** to work on those who have not yet scheduled their appointment for advising.

## [Appointment Campaigns](#) > Pre-Registration Advising for Fall 2022

[Expired] 02/23/2022 - 03/25/2022

STUDENTS IN CAMPAIGN  
**8**

APPOINTMENTS MADE  
**100%**  
8 Students

APPOINTMENTS ATTENDED  
**100%**  
8 Students

SUMMARIES CREATED  
**50%**  
8 Students

[Edit Campaign Details](#)  
[Delete This Campaign](#)  
[Export Student List](#)

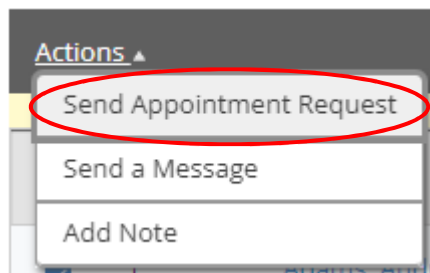
**Campaign Information**  
Care Unit  
**Advising**  
Service  
**Registration**  
Location  
**Academic Services**  
Default Appointment Length  
**1hr 0min**  
Slots Per Time  
**1**  
Appointment Limit

**Appointments Scheduled** | Appointments Not Yet Scheduled | Summaries Created | Eligible Appointments

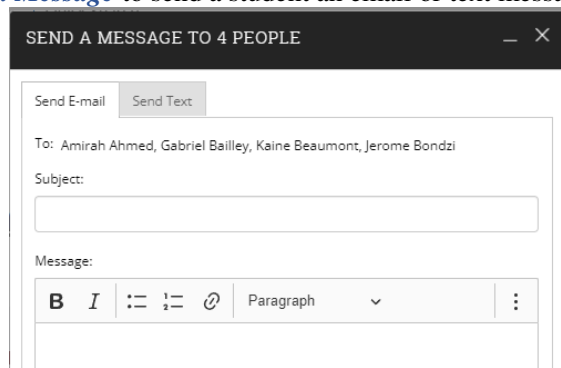
Actions ▼

<input type="checkbox"/>	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	APPT CREATED ON	
<input type="checkbox"/>	1	03/15/2022	11:00am - 12:00pm ET	<a href="#">King, Lauren</a>	No	03/11/2022	<a href="#">View Details</a>
<input type="checkbox"/>	2	03/15/2022	11:00am - 11:30am ET	<a href="#">King, Lauren</a>	Yes	03/15/2022	<a href="#">View Details</a>

6. Click on the check box circled in red above to select all of the students. Then click on the Actions drop down menu to select **Send Appointment Request** or **Resend Appointment Request**



7. You can also click *Send a Message* to send a student an email or text message if needed



## Who to Contact with Questions:

Academic Services: 540-654-1010

Wes Hillyard – [rhill5ch@umw.edu](mailto:rhill5ch@umw.edu)

April Wynn – [awynn@umw.edu](mailto:awynn@umw.edu)

Anna Hollrah – [abarton@umw.edu](mailto:abarton@umw.edu)