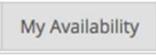
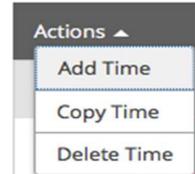


# EAB Navigate Resource Guide: How to Enter Campaign Availability and Run a Campaign

## 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-menu 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 or 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 in the **From** and **To** boxes for your availability on the days selected

From	To
8:00am	5:00pm

- c. Next, click the **Please select a duration** drop-box, , and select **A Range of Dates** which you may define yourself. (e.g. July 5 to July 30)

How long is this availability active?

A Range of Dates

- d. Please **do not** select the box to add personal availability link

Add to your personal availability link?

Add this availability to your personal availability link?

- e. Select your type of availability as **Campaigns**

What type of availability is this?

Appointments	Drop-ins	Campaigns
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- f. Set up **Meeting Type** as either **Virtual** and **In Person** or you can choose both

Meeting Type

x Virtual

g. Set your *Care Unit* to **Advising**



h. From among your *Location* options, select **Faculty Office/Virtual Meeting**



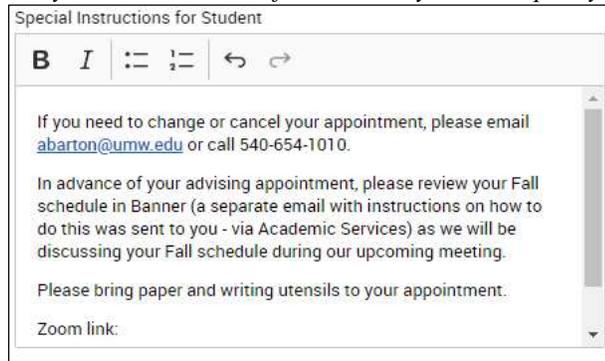
i. Then select from *Services* select **Registration**



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



k. If desired, type in the *Special Instructions for Student* box any special instructions you wish to convey. (See example below, but please use your own contact information....you can repeat your Zoom link URL here )



Special Instructions for Student

**B** *I* | **☰** **☷** | ↶ ↷

If you need to change or cancel your appointment, please email [abarton@umw.edu](mailto:abarton@umw.edu) or call 540-654-1010.

In advance of your advising appointment, please review your Fall schedule in Banner (a separate email with instructions on how to do this was sent to you - via Academic Services) as we will be discussing your Fall schedule during our upcoming meeting.

Please bring paper and writing utensils to your appointment.

Zoom link:

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



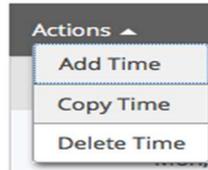
m. Lastly, make sure to click the **Save** button, at the bottom right of the *Add Availability* window to save your entry.

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 05, 2023 to July 28, 2023	Academic Services - Summer Orientation (Virtual)	First-Year Orientation Advising For: Campaigns	Advising	No	Virtual <a href="#">Upcoming/Edit</a>

- If you need to enter additional Campaign availability, the quickest way is to copy your newly entered time and edit some of the details. Simply click on the *check box* circle in red above, next to your entry and then click *Actions* drop-menu and select *Copy Time*



This will prepopulate a new *Add Availability* window with some of your previously selected details for ease of reentry and saving if you want to have different time slots for another week.

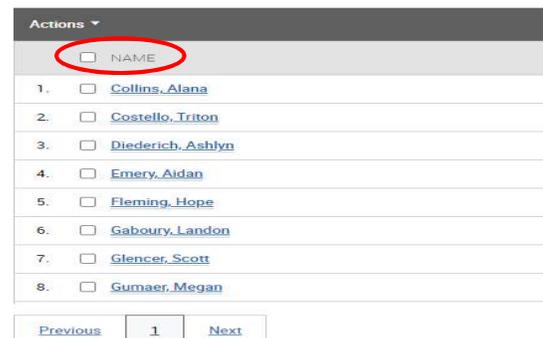
## Part 2: Defining and Running a Campaign

*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.*

- Login to <https://umw.campus.eab.com> using your UMW single sign-on
- From your EAB homepage, locate and click on the *Advanced Search icon*  on the left-hand side of the screen
- Once in Advance Search, locate the *Assigned To* dropdown tab – here you will define the *Student has Relationship as Advisor*, and then locate yourself from the *Staff* drop-down list.

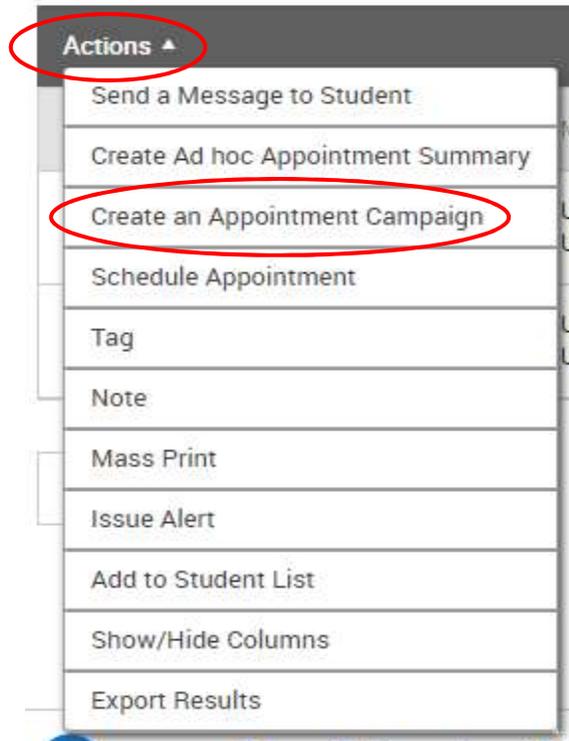
- Once the advance search parameters are defined click  at the bottom of the screen

- This will generate your list of students (Banner IDs are not shown on the screen shot to the right)



- Check the “NAME” box (circled in red in the image to the right) to select all of the students on the list.

Then select *Actions* drop-menu and select *Create an Appointment Campaign*



7. Begin by entering the requisite information under the *Define Campaign* page:
  - a. Enter a unique *Campaign Name* (e.g. Fall/Spring Registration Advising)
  - b. Choose *Advising* for your *Care Unit*
  - c. Indicate *Faculty Office/Virtual Meeting* for your *Location*
  - d. Select the service type *Registration*

### Campaign Configurations

Campaign Name * <input style="width: 95%;" type="text" value="Spring Registration Advising"/>	Instructions or Notes for Landing Page: <input style="width: 95%;" type="text"/>
Care Unit: * <input style="width: 95%;" type="text" value="Advising"/>	Location: * <input style="width: 95%;" type="text" value="Faculty Office / Virtual Meeting"/>
Service: * <input style="width: 95%;" type="text" value="Registration"/>	

- e. The *Appointment Configurations* are already preset but can be changed
  - ❖ Establish your *Appointment Limit* (typically chosen as **1** to limit each student to a single appointment with you through this Campaign)
  - ❖ Set your *Appointment Length* (We suggest that this should be one hour to provide a 30-minute buffer between appointments)
  - ❖ 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. **Launch Date** option is if you do not want to send the campaign out today, but in a few days or the following week.
- h. 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 on the Add Staff page, 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 Nudges** 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. After clicking the  button a **Compose Message** box will appear

<p><b>Compose Message</b></p> <p>* Subject  <input type="text" value="{student_first_name}, Schedule an Advising appointment"/></p> <p>* Message</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>B I</b>            Heading 2   Merge Tags      </p> <p><b>Appointment.</b></p> <p><b>Hello {student_first_name}:</b></p> <p>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.</p> <p>{schedule_link}</p> <p>Thank you!</p> </div> <p><b>Available Merge Tags</b> ⓘ</p> <table style="width: 100%; border: none;"> <tr> <td style="border: none;">{student_name}</td> <td style="border: none;">Inserts the first name and last name of the student</td> </tr> </table>	{student_name}	Inserts the first name and last name of the student	<p><b>Preview Email</b></p> <p><b>Andrew, Schedule An Advising Appointment</b></p> <div style="border: 2px solid #003366; padding: 10px; text-align: center;">  </div> <p>Please Schedule Your Advising Appointment.</p> <p><b>Hello Andrew:</b></p> <p>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.</p> <p><b><a href="#">Schedule an Appointment</a></b></p> <p>You can also copy and paste this address into your web browser.  <a href="https://umw.campus.eab.com/a/123456">https://umw.campus.eab.com/a/123456</a></p> <p>Thank you!</p>
{student_name}	Inserts the first name and last name of the student		

- b. Feel free to customize the message as it might be helpful for your students by changing the *Message* text in left box – the preview of your changes will show in the right box in the *Preview Email* box. Please do NOT change the merge tags.
- c. You may add attachments as necessary by the *Choose File* option
- d. Select what *Send Date* that you want the student to receive the email

- e. Click  when finished and then click , please do not worry about the *Success Message (Optional)*.

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

- Click the  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. The instructions below will show you how to easily resend the campaign to any students who has not yet made their advising appointment.

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* wording



- 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 name to open it up
- Once in the campaign, you can see a list of students with appointments scheduled, appointments not yet scheduled, etc... click on the *Appointments Not Yet Scheduled* tab to work on those who have not yet scheduled their appointment for advising.
- You can either select a student individually by checking the box next to their name or you can select the top check box (circled in red below) to select all of the students

## Appointment Campaigns > Fall 2025 Transfer Checkin Meetings

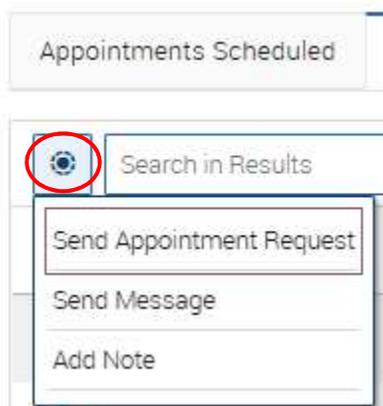
08/28/2025 12:00 AM ET - 09/26/2025 12:00 AM ET



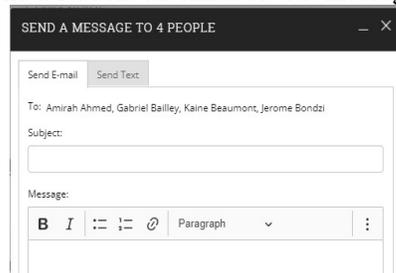
Appointments Scheduled **Appointments Not Yet Scheduled** Summaries Created Eligible Appointments

<input checked="" type="checkbox"/>	NAME	STUDENT ID	EMAIL	REMAINING APPOINTMENTS
<input type="checkbox"/>	<a href="#">Abed, Yasmine</a>	000484569	yabed@mail.umw.edu	All (1)
<input checked="" type="checkbox"/>	<a href="#">Adams, Amiri</a>	000469207	aadams7@mail.umw.edu	All (1)
<input type="checkbox"/>	<a href="#">Aksit, Zeyne</a>	000484843	zaksit@mail.umw.edu	All (1)
<input type="checkbox"/>	<a href="#">Atchison, John</a>	000482464	iatchis2@mail.umw.edu	All (1)

- Once you have a student or students selected, click on the **Actions Button** (circled in red below) which will bring up the drop-down menu and then select *Send Appointment Request* to send the request again.



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



## Who to Contact with Questions:

Academic Services: 540-654-1010

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