# Appointment Campaign

How to create an Appointment Campaign. *You will want to determine time frame of campaign and write content of communication prior to starting this process.*

<table>
<thead>
<tr>
<th>Steps</th>
<th>Descriptions</th>
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<tr>
<td>1.</td>
<td>Enter your UHCL user name and password to login to Navigate. <a href="https://uhcl.campus.eab.com">https://uhcl.campus.eab.com</a></td>
</tr>
<tr>
<td>2.</td>
<td>Ensure: Your My Availability is set-up. (See “How to Set-Up My Availability” instructions). If you do not set-up your My Availability, you will be able to update the communication in EAB. <em>When setting-up your MyAvailability make sure to click on Campaign in step 4 of “How to Set-up My Availability”. If not you will NOT be able to select yourself as Organizer of campaign.</em></td>
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</tbody>
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3. **Staff Home Page**

   **CLICK:** Campaign icon on the left hand side.

4. **Click:** Appointment Campaign from the right hand side, under ACTIONS
Define Campaign:
- Enter campaign name (Student will not see name) Naming convention
  - PeopISoft Term (when it is being sent) Outreach Occurred/TermAttempting to Impact/College or Dept Abbrev_name or Purpose campaign__advisor last name. ex. 2100_2100__FSAC_PAS_Gibson
- Care Unit: Advising
- Location:
- Service (My Availability and Service Campaign must match.)
- Begin Date and End Date (Must match MyAvailability. Ensure you have created a Campaign not drop-in etc.
- Appointment length (How long do you want your appointment to last?)
- Appointment Limit (How many appointments can students schedule for the campaign?)
- Location: Choose location. (Ensure location in MyAvailability and Campaign is the same.)

Click: Continue

5. **Click:** Advanced Search to filter student caseload
Choose to invite All My Assigned Student or do an Advanced Search (To search for particular students)

```text
Spring 2019 Registration
Add Students To Campaign
```

```text
Invite All My Assigned Students
Advanced Search
```
6. **Click:** Drop down arrows to narrow search:
   - To ensure you only return list of students assigned to you, click box **My Students Only**
   - **Note:** Category (located in Student Information drop-down): students can be filtered to find probation students etc.

   **Click:** Search button

7. **Click:** Modify Search (If needed to narrow list or adjust list of students.)
   - **Select:** ALL or Individual students
   - **Click:** Continue Button
8. **Review Students in Campaign**
   - **Click:** Add More Students (if you are missing any student)
   - **Click:** Continue (once you have a complete list of students for campaign)

9. **Add Organizers To Campaign**
   
   *(If you have correctly set-up your availability for the campaign, you should see your name on this page under “Add Organizers to Campaign.”)*

   - **Click:** Box next to your name. Then **Click:** Continue
Email Message and Preview Landing Page

Enter: Subject Line for email (Default is “Schedule an Advising appointment.”)
Enter/Update: Email content (Or you can use defaultry email message below)
Attached: Any files (optional)
Enter: Instructions or notes for Landing Page.

(Note: DO NOT REMOVE ${student_first_name} or ${schedule_link} in body of email. If removed, students will not able to schedule an appointment.

As you edit fields, text in the box below will show how your edits will appear in the message. See step #10.

To view Preview of Landing Page
Click: Preview Landing Page
Click: Continue (when done reviewing landing page)
11. **Student View of email**

**Click:** Continue

Snapshot of what the email the student receives will look like.

12. **Review details of your campaign prior to clicking send**

**Click:** View on Email Preview to see email being sent.

**Click:** View all on Invities to see list of students receiving email.

**Click:** Included organizers on View All to view senders.

When you are ready, click send to issue the email to students on the list.

13. **DONE**

Updated M.Ramos 01/27/2020

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