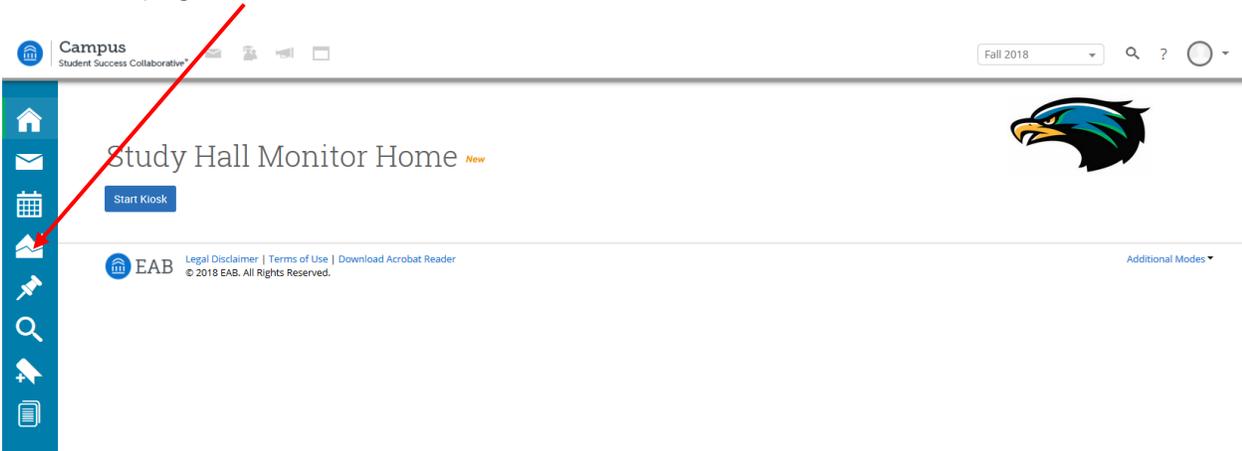
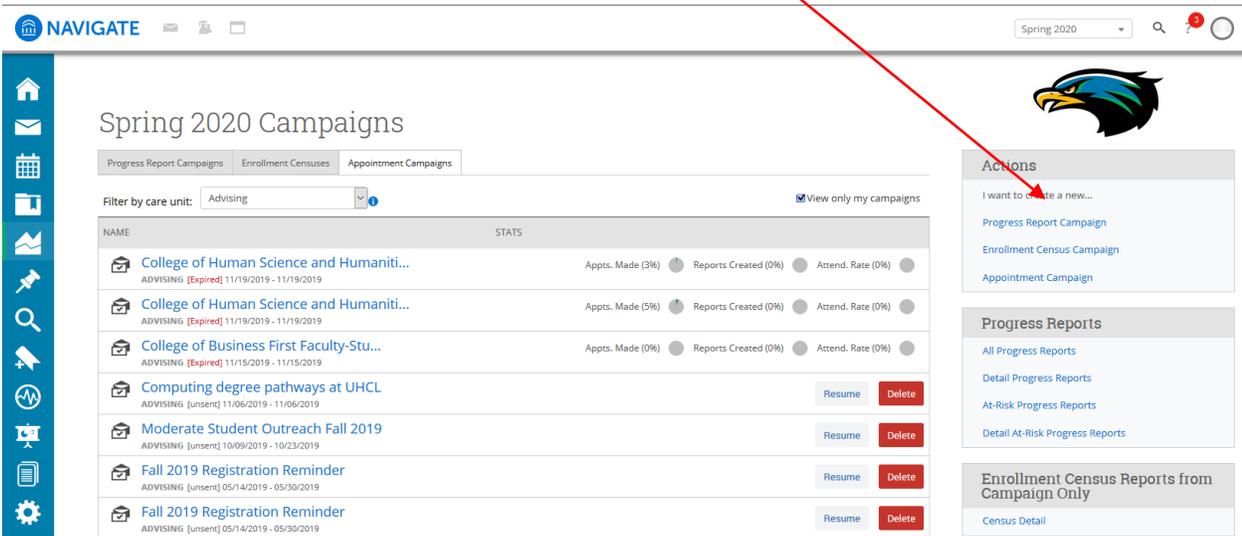


## Appointment Campaign

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.)*

Steps	Descriptions
1.	Enter your UHCL user name and password to login to Navigate. <a href="https://uhcl.campus.eab.com">https://uhcl.campus.eab.com</a>
2.	Ensure: Your My Availability is set-up. (See "How to Set-Up My Availability" instructions). <b>If you do not set-up your My Availability, you will be able to update the communication in EAB.</b>  <i>*When setting-up your <b>MyAvailability</b> 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 <b>Organizer</b> of campaign.</i>
3.	<p><b>Staff Home Page</b></p> <p><b>CLICK:</b> Campaign icon on the left hand side.</p> 
4.	<p><b>Click:</b> Appointment Campaign from the right hand side, under ACTIONS</p> 

**Define Campaign:**

- Enter campaign name (Student will not see name) Naming convention
  - PeopleSoft Term (when it is being sent) Outreach Occurred/Term Attempting 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**

Campus Student Success Collaborative

Fall 2018

### New Invitation Campaign

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name:

Care Unit:

Location:

Service:

Begin Date:

End Date:

Appointment Limit:

Appointment Length:

Slots Per Time:

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).

Campus Student Success Collaborative

Fall 2018

Define Campaign > Add Students > Add Staff > Compose Message > Confirm & Send

### Spring 2019 Registration

Add Students To Campaign

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

The screenshot shows the 'Spring 2019 Registration' page. At the top, there's a navigation bar with 'Campus Student Success Collaborative' and 'University of Houston Clear Lake'. Below that, there's a 'Spring 2019 Registration' section with 'Add Students To Campaign' options. A search interface is visible with a 'Search' button highlighted by a red arrow. The search interface includes a 'Saved Searches' dropdown, a search input field, and several filter categories: 'Student Information', 'Enrollment History', 'Area of Study', 'Performance Data', 'Term Data', 'Course Data', and 'Assigned To'. At the bottom, there are 'My Students Only' and 'Include Inactive' checkboxes, and a 'Search' button.

7.

**Click:** Modify Search (If needed to narrow list or adjust list of students.)

**Select:** ALL or Individual students

**Click:** Continue Button

Add Students To Campaign

The screenshot shows the 'Add Students To Campaign' page. It features a search interface with filters: 'Standard User Type', 'Category: Academic Probation (PROB)', 'Enrollment Terms: Spring 2019', and 'My Students Only'. Below the filters is a 'Search' button and a 'Modify Search' link. The main content is a table with columns for 'ALL', 'STUDENT NAME', and 'ID'. The table contains 8 rows of student data, each with a checkbox in the 'ALL' column. At the bottom, there are 'Previous', '1', and 'Next' navigation buttons, and a '10 total results' indicator.

< Back

Continue >

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

10.

### 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 default 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 be 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.

Compose Your Message

`{student_first_name}`, Schedule an Advising appointment

**B I** Paragraph Merge Tags

**Please schedule your Advising appointment.**

Hello `{student_first_name}`:

Please schedule an appointment for Probation Advising at Freshman & Sophomore Advising (Bayou 1408). 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?	<code>{student_first_name}</code> Inserts the student's first name	<code>{student_last_name}</code> Inserts the student's last name	<code>{schedule_link}</code> Inserts a link to schedule the appointment
-----------------------	---	---	--

Add Attachments

Select file to attach



Instructions or Notes for Landing Page

### To view Preview of Landing Page

**Click:** Preview Landing Page

**Click:** Continue (when done reviewing landing page)

Preview Email Preview Landing Page

**Choose A Day**

**Choose A Time**

Wed, Jul 09

- 3:50pm
- 4:00pm
- 4:10pm
- 4:20pm
- 4:30pm
- 4:40pm

**Comments**

Is there anything specific you would like to discuss?

Comments:

You will be sent an email reminder by the morning of your appointment.

Review Appointment Details

< Back Save and Exit Continue

11. **Student View of email**

**Click:** Continue

Andrew, Schedule An Advising Appointment

Please Schedule Your Advising Appointment.

**Hello Andrew:**  
Please schedule an appointment for Probation Advising at Freshman & Sophomore Advising (Bayou 1408). 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://uhcl-campus.eab.com/ta/123456>

Thank you!

[< Back](#) Save and Exit [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.

Spring 2019 Registration

Confirm & Send

Care Unit: Advising      Start Date: 11/05/2018      End Date: 11/15/2018  
 Location: Freshman & Sophomore Advising (Bayou 1408)      Appt Length: 30 minutes      Slots Per Time: 1  
 Service: Mandatory Advising Program requirement      Appt Limit: 1      Organizer Attendee Reminders:  E-mail  SMS  
 Organizer Attendee Reminders:  E-mail  SMS

Subject: Spring 2019 Registration Advising

[Email Preview](#) [View](#)      [Invities - View All \(14\)](#)      [Included organizers - View All \(1\)](#)

[< Back](#) Save and Exit [Send](#)

13. **All Campaigns > Spring 2019 Registration**

Done

**Congratulations!**  
Spring 2019 Registration has been created and invitations will be sent out shortly.

What would you like to do now?  
[View Appointment Campaign Information](#)  
[Create Another Campaign](#)  
[Go Home](#)

**DONE**

Updated M.Ramos 01/27/2020

Updated. 11/12/2019

