



## Set Up Your Appointment Availability

In order for students to make appointments with you, the first thing you need to do is set up availability in EAB Navigate. Your availability will be based on locations and services already created in Navigate.

### Advisor Home ▾

Students   Upcoming Appointments   My Availability   Advising Center   Advising Requests

[Edit Appointment Constraints](#)

Times Available

Actions ▾		TIMES	DATES	LOCATION	SUBJECT
<input type="radio"/>	Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Academic Success Center	<a href="#">Edit</a> Advising, Changes to my Schedule, Internship/Job Search Assistance, Interview Coaching, Orientation, Resume Development, Selecting a Major, Weekly Meeting / Scheduled Meeting For Appointments
<input type="radio"/>	Mon	9:00a-5:00p	Forever	Academic Success Center	<a href="#">Edit</a> No listed Student Services

**ADD AVAILABILITY** X

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 8:00am To 5:00pm

How long is this availability active?

Please select a duration

What type of availability is this?

Appointments Drop-ins Campaigns

Care Unit  
Please select a care unit

Location  
Please select a location

Services  
Please select services

Special Instructions for Student  
e.g. room 23, please bring paper

Cancel Save

**Step 1:** From your home screen, click the tab for My Availability, and click the Add Time button in the Actions Menu.

**Step 2:** Select the days and times when you are available to meet with students. If you are available different times on different days, set up other availability profiles after this is saved.

**Step 3:** Set your times broadly – as early and late as you will ever have appointments – and then you will manage your specific availability through your Outlook calendar.

**Step 4:** You can set your availability for this semester, for a range of dates, or forever. When you need to make a change, you can always just come back to edit this profile. Students will only be able to see appointment times for the next 14 days.

**Step 5:** Select whether you will meet with students via appointments or drop-ins, or you can select both. The campaign option is normally reserved specifically as dedicated time for targeted students to make appointments with you.

**Step 6:** Choose Advising as the Care Unit.

**Step 7:** Choose the location where you will be available.

**Step 8:** Select which services you can provide to students during this availability. Make sure to select ALL of the specific services for your location marked with asterisks – if you miss one, then you will not show as available for that service. You do not need to choose the advisor-facing services (without an asterisk) because students will not choose those when making an appointment. Leaving this services field empty means you will appear to be available for every advising service on campus. Don't leave blank!

**Step 9:** List any Special Instructions that you want students to see for the appointment, such as location hints.

**Step 10:** Finally, you can indicate whether you will allow more than one student at a particular appointment time.

Click **Save**. Repeat for any other availability profiles you'd like.



## Create an Appointment Campaign

**Navigating to Campaigns:** While on the advisor home screen, select “Appointment Campaigns” from the left hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

### Define Campaign:

- Name your campaign (Students will not see the name of the campaign)
- Select “Advising” as the Campaign Type
- Select 1 slot per time
- Under “Select Course or Reason”, choose the services for which you are available. NOTE: This must match the availability you have set up on your advisor home page, under “My Availability”. In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for “Registration”, you must also have chosen “Registration” as a service you are available for in your campaign appointment availability.
- Begin Date and End Date- choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. NOTE: This must match the availability you have set up on your advisor home page, under “My Availability”. Ensure that you have created CAMPAIGN availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.
- Appointment Length- how long do you want the appointment to last?
- Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- Location- Choose your location. NOTE: Ensure that for the campaign availability you have created under “My Availability” you have selected that you will be available in the same location (Advisor’s office).

**Adding Students:** Use the advanced search feature to search for students you would like to participate in the campaign. Or, choose one of your saved searches by clicking the drop down arrow beside “Saved Searches”. If you want to ensure that you only return a list of students assigned to you, also click the box beside “My Students Only” next to the Search button. Select the students you wish to include in your campaign. Confirm the list of students included and remove or add students as needed.

### Review Students In Campaign

Actions ▾	
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Ellert, Channah
<input type="checkbox"/>	Malis, Philbert
<input type="checkbox"/>	Plaas, Claire
<input type="checkbox"/>	Tourtelotte, Zohartze



## Create an Appointment Campaign (continued)

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**Adding Staff:** If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

### Compose Your Message:

- Create a Subject Line for your email
- In the next box, edit the text for the email. Default is "Please schedule your advising appointment".  
NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.
- In the instructions and notes box, add any details about the appointment that you would like to display on the scheduling landing page. For example, "This is a registration appointment to ensure you register for Fall 2016 classes. Please bring a list of courses you are interested in."
- As you edit these fields, the text in the box below will show how your edits will appear in the message.
- Scroll down to the bottom of the screen. On the left tab, you will see a snapshot of what the email the student receives will look like.
- On the right tab, you will see the scheduling landing page. This is where the student will be directed to choose a time for their appointment when they click the link in their email.

**Confirm & Send:** Review the details of your campaign. When you are ready, click send to issue the email to students on the list.