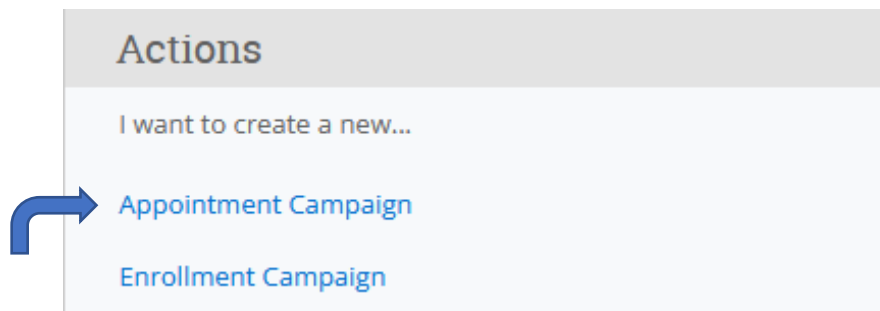
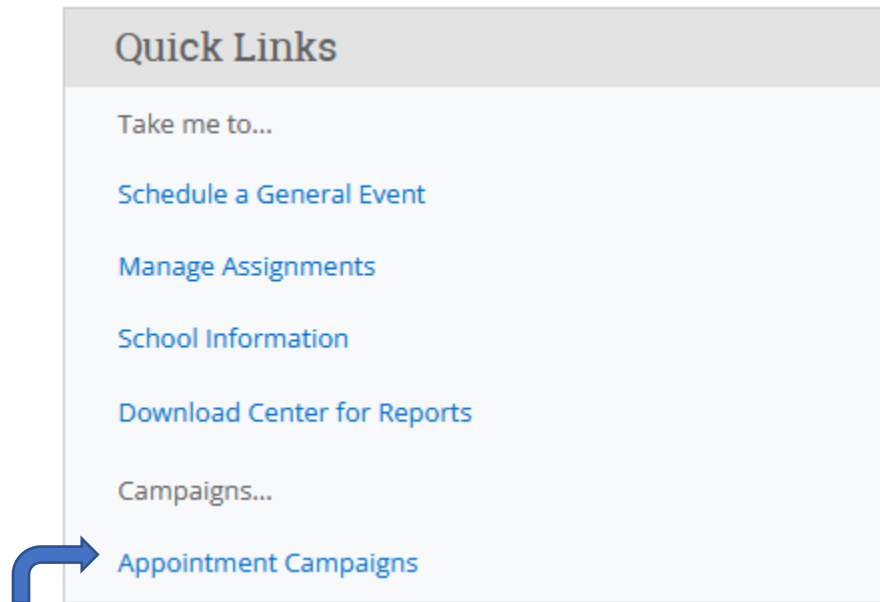




Launching an Appointment Campaign in Navigate

To begin:

- Click appointment Campaigns in the Actions or Quick Links menu



Define the Campaign:

- In this step, you will set the criteria for your Appointment Campaign
- Campaign Name: This is visible to the person creating the campaign and any other users who have access to view campaigns, but it is not visible to the student
- Suggested format for Campaign name:
Term, Population, Purpose
Term, Population, College, Purpose

Term, College, Purpose, Last name of user who created the campaign

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.

The screenshot shows a form titled 'Define Campaign' with the following fields and options:

- Campaign Name:** A text input field with a blue arrow pointing to it.
- Care Unit:** A dropdown menu.
- Location:** A dropdown menu.
- Service:** A dropdown menu.
- Begin Date:** A date picker set to 02/28/2022.
- End Date:** A date picker set to 03/14/2022.
- Appointment Limit:** A dropdown menu set to 1.
- Appointment Length:** A dropdown menu set to 5 min.
- Slots Per Time:** A dropdown menu set to 1.
- Allow scheduling over courses:** A checkbox that is currently unchecked.

At the bottom of the form, there are three buttons: 'Cancel', 'Save and Exit', and 'Continue'.

- **Care Unit:** Select the Carte Unit the Appointment Campaign will be associated with
- **Location:** Select the location where the appointment(s) will be held
- **Service:** Select the Student Service that will be associated with the campaign
- **Course or Reason:** Add the reason or associated course for the campaign in this area. This will only appear if the 'Service' is tied to a course
- **Begin & End Date:** These are the dates you want students to start and stop making appointments associated with this campaign
- **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign (It is typically 1 for registration)
- **Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at 5 minutes and will be determined by your entry
- **Slots per Time:** Appointments can be individual or group. By adding more than one 'slot per time', you can make a group appointment. Otherwise, if you wish to meet with students individually, leave it at 1

Add Student to the Campaign:

- Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.
- You have several ways to search for and select your students

Invite All My Assigned Students: Adds all students assigned to you to the campaign

Advanced Search: Use the Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu. Once finished, click Continue to move to the next page. You are asked to review the students in the campaign. If they are correct, click continue.

See chart below:

Add Students To Campaign

Add My Assigned Students to Campaign

Advanced Search

Saved Searches -

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Section Tag, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Section, Status

Assigned To

Goals & Interests Post Degree Goal, Favorites?

Polls Questions, Choices?

Success Indicators Support Priority, Success Markers

Search My Students Only Include Inactive

< Back Continue >

Add Staff to Campaign

- You will need to select yourself as staff for the campaign. You also have the option to select additional staff to make them available for appointments based on the campaign

NOTE: Staff will need to have availability defined before they can be added to an appointment campaign. If you do not see staff you wanted to add, make sure their calendars and availability are up-to-date.

Add Advisors To Campaign Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Emily Senta	Tue, Thu 3:00pm-5:00pm
<input type="checkbox"/>	Maanie Hamzaee	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	LaToya White	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Matthew Mustard	Tue, Thu, 8:00am-1:00pm
<input type="checkbox"/>	Matthew Mustard	Tue, Thu 8:00am-5:00pm
<input type="checkbox"/>	Gina Scharr	Mon-Fri 12:45pm-5:00pm
<input type="checkbox"/>	Kirsten Smith	Tue-Thu 1:00pm-5:00pm
<input type="checkbox"/>	Ashlee Demastus	Mon-Wed, Fri 8:00am-6:00pm
<input type="checkbox"/>	Ashley Liberio	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Rachel Wolfowitz	Mon-Fri 8:00am-12:00pm
<input type="checkbox"/>	Thomas Sellers	Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Christine Duchouquette	Tue, Thu 1:00pm-5:00pm (Fall Semester 2017) Mon-Tue, Thu-Fri 10:30am-12:00pm (Fall Semester 2017)

< Back Save and Exit Continue

Compose Your Message

- Your next step is to compose the message you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use 'Merge tags'.
- **NEVER REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY**

The screenshot displays the 'Compose Your Message' interface. At the top, there is a text input field containing the placeholder text '({student_first_name}), Get a Final Check Up'. Below this is a rich text editor with a toolbar showing bold, italic, link, and other formatting options. The main message body contains the following text: 'Are You Ready for Finals? Get a Check Up!', 'Hello ({student_first_name}):', 'Your advisor requests that you schedule an appointment. 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.', and '({schedule_link})'. Below the message body is a 'Merge Tags' section with three columns: '({student_first_name}) Inserts the student's first name', '({student_last_name}) Inserts the student's last name', and '({schedule_link}) Inserts a link to schedule the appointment'. Underneath is a text input field for 'Instructions or Notes for Landing Page'. At the bottom, there are two tabs: 'Preview Email' and 'Preview Landing Page'. The 'Preview Email' tab is active, showing a preview of the email with the subject 'Andrew, Get A Final Check Up', the same message body as above, and a 'Schedule an Appointment' link. The preview also includes a URL: 'https://whitehurst-campus-training3.eab.com/ra?23456'. At the very bottom of the interface are three buttons: '< Back', 'Save and Exit', and 'Continue'.

Fields used in the message composition are:

- **Email Subject:** The topic is the subject of the email going to the student.
- **Instructions or Notes:** This is specific to the landing page students are taken to when they click on the link in their email to choose the date and time of their appointment.
- After you have finished composing your message, it's time to send out your campaign!

Review your campaign details, invitees, and advisors on this page. Select how your organizers and attendees get reminders about appointments.

Confirm & Send

Care Unit: Academic Services	Start Date: 12/09/2020	End Date: 01/22/2021
Location: 2420 M Street	Appt Length: 15 minutes	Slots Per Time: 1
Service: Academic Advising	Appt Limit: 1	Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS
		Non Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> SMS
Subject {\$student_first_name}, Schedule an Academic Services appointment		
Email Preview View	Invitees: View All (1000)	Included organizers View All (2)

[< Back](#)

Save and Exit

[Send](#)

