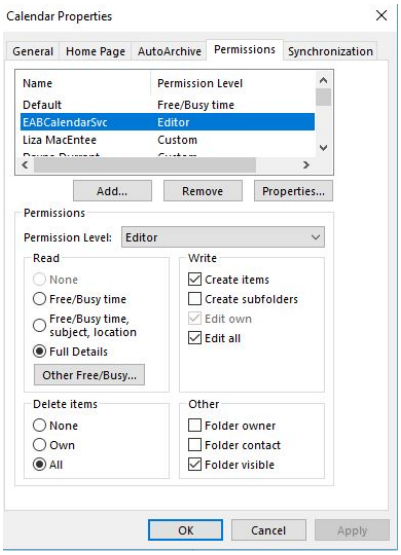
Setting up Appointment Campaigns

1. **Outlook Permission:**

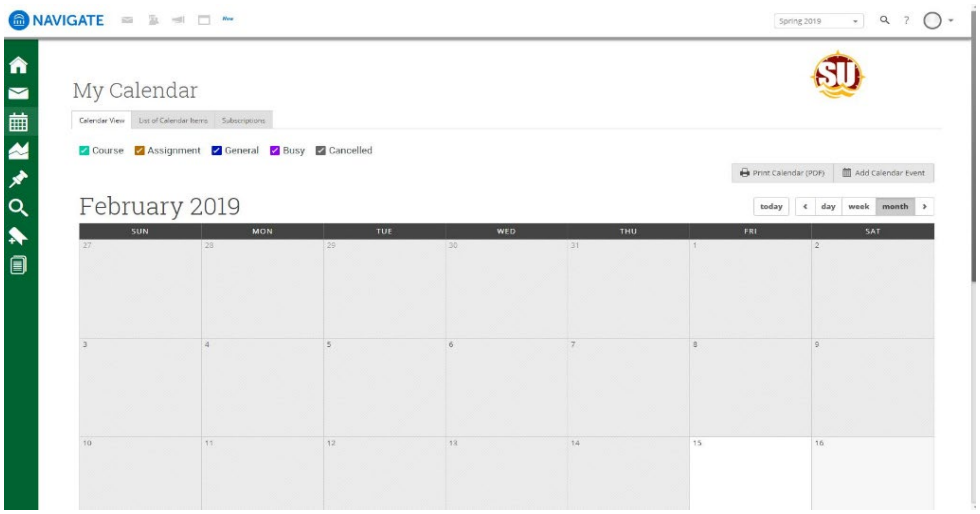
Before starting a Campaign, you will have to sync your Outlook Calendar with your Navigate Calendar. This entails you granting EAB Editing permission on your Outlook Account.



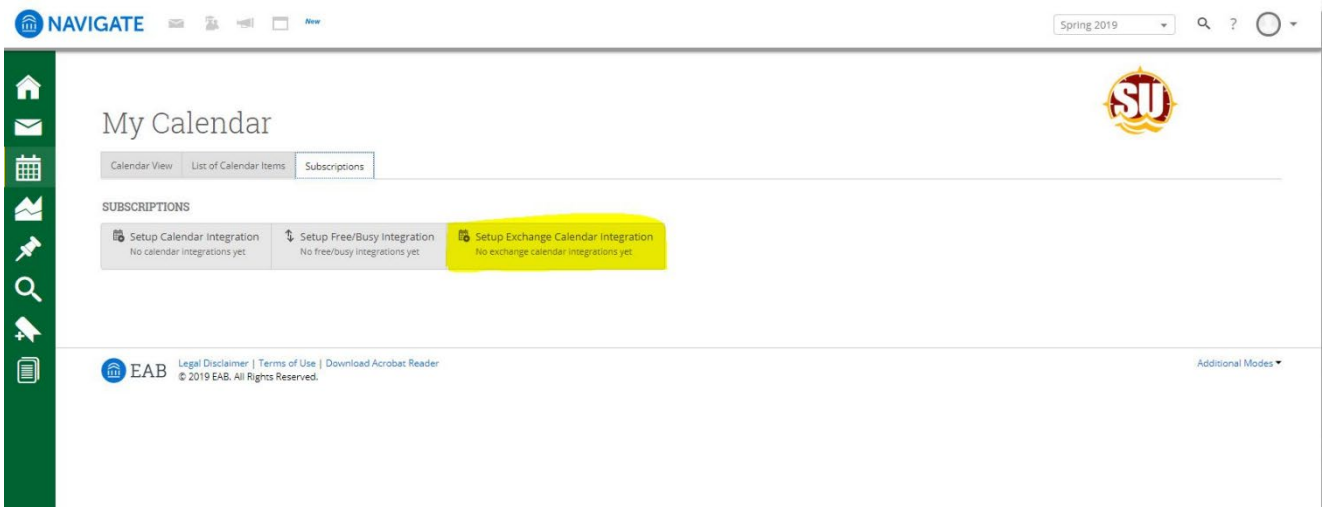
To grant EAB access to your Outlook Calendar, you will have to click “Calendar Permissions” when you are in your Outlook Calendar. Then Add “EABCalendarSyc”. Before clicking “Apply” you will have to set the Permission Level to Editor.

2. **Navigate Sync:**

Once you have given EAB Calendar Permission, you will have to login to Navigate and go into your Calendar:

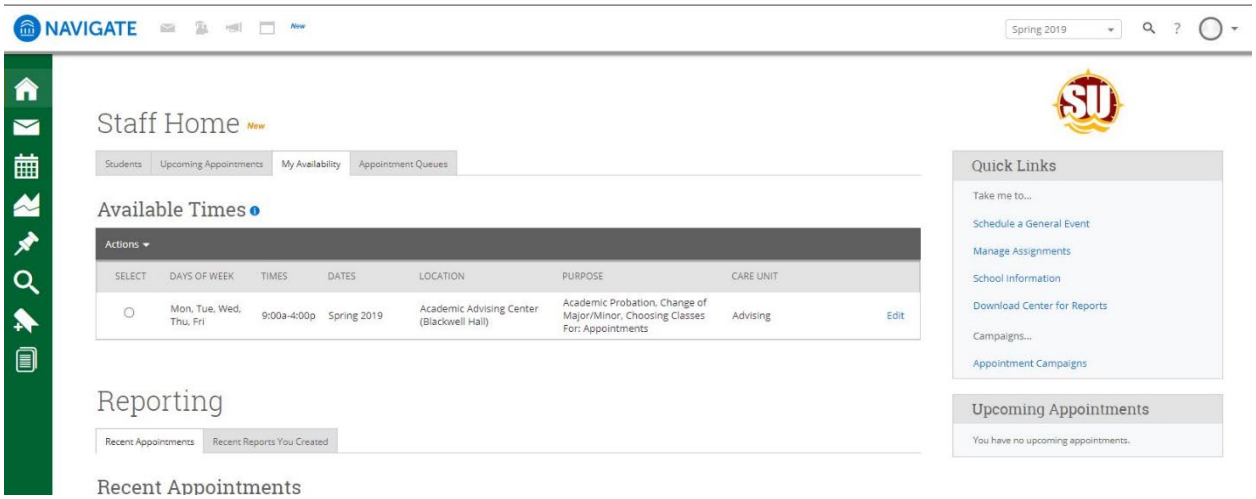


In your Naviage Calendar you will to click “Subscriptions” then click “Setup Exchange Calendar Integration”. Next you will have to click “Connect with Exchange” to finish the synchorization. You may have to give the system 24 hours to complete the sync before you will notice that your calendars are connected.



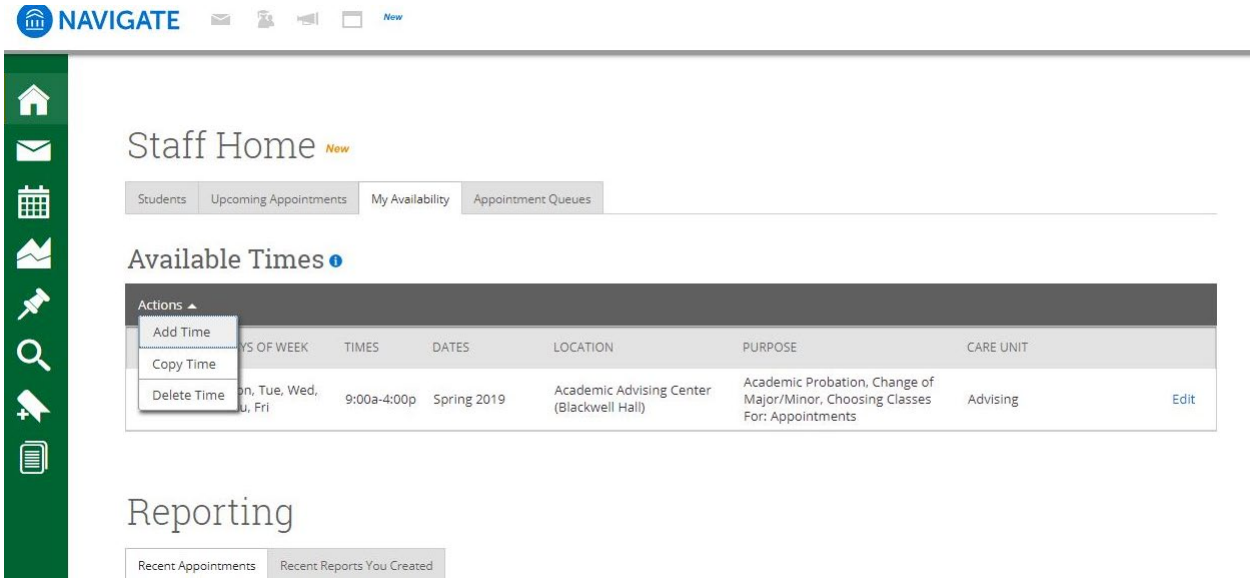
3. **Creating Availability**:

To be able to make appointments with student or run campaigns you will have to indicate the times you are available, date ranges and reasons that students are able to make appointments for.



On your Navigate home page you will see a tab in the middle of your Home screen that says “My Availability”. The screen above is what should appear once you open that tab, but you will not have any times available yet.

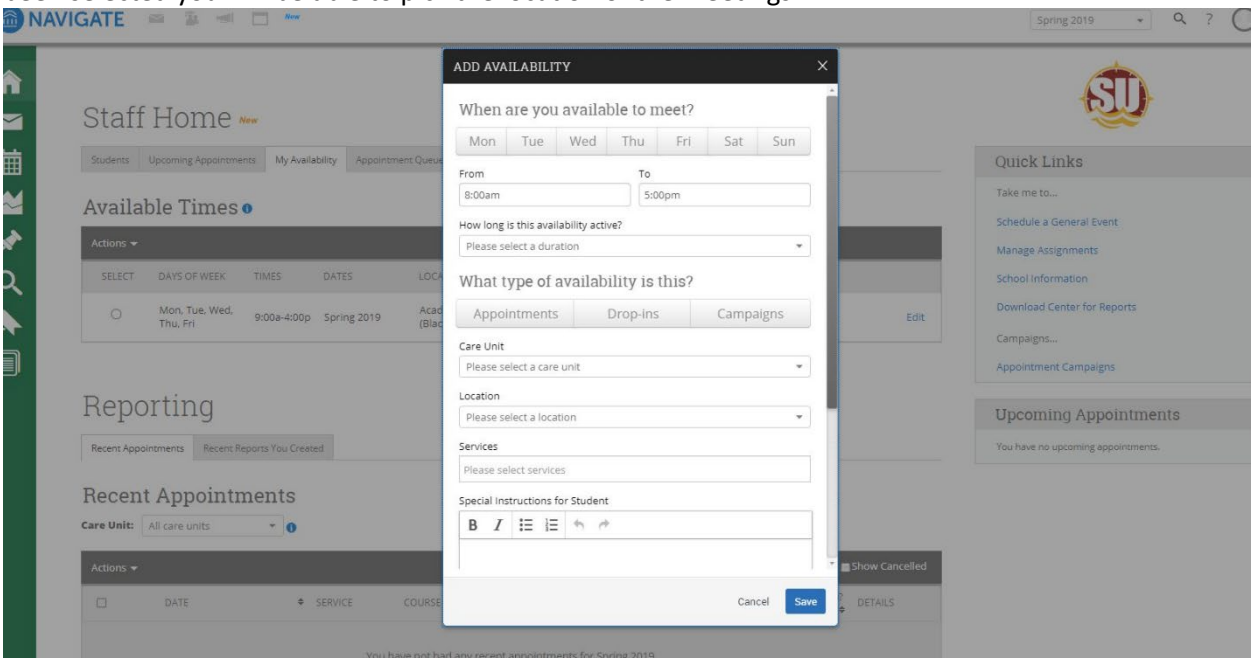
To create your available time you will need to click “Action” to allow the drop down option to appear and select “Add Time”.



When you click “Add Time” a new window will open up for you to put the exact days of the week, time range and how long the meeting dates are for (ex. Spring 2019, Specific Date Range, or Forever).

Under “What type of availability is this?” You have the option of only selecting Campaigns or you can select all three options. If you want students to come in and see you outside of the Campaigns your run I would recommend that you also select Appointments.

In the Care Unit you will select if the meeting are for Advising or Faculty Office Hours. Once that has been selected you will be able to pick the location of the meetings.

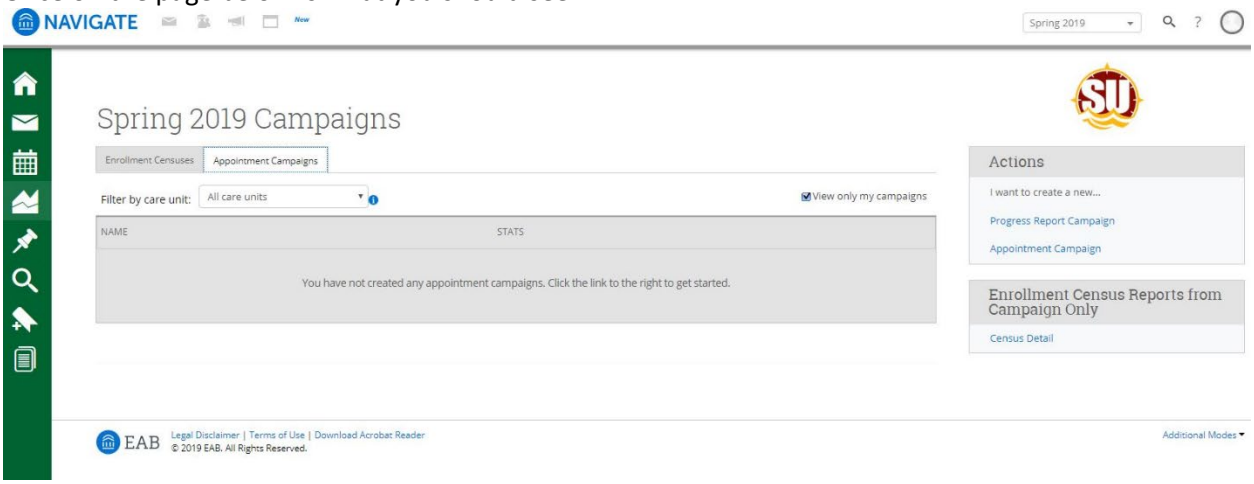


Additionally you will need to select the Services that you want your availability for, but make sure the services you select are also the services for your campaigns. For example if you plan on running a

campaign for “Choosing Classes” your available times will need to have “Choosing Classes” in the Services.
After everything is completed you will click Save and your Available times will now be set in Navigate.

*Advise- Since your Calendars are Synced you will want to make sure you keep your Outlook events as up to date as possible to prevent conflicts from happening when students are scheduling meeting with you.

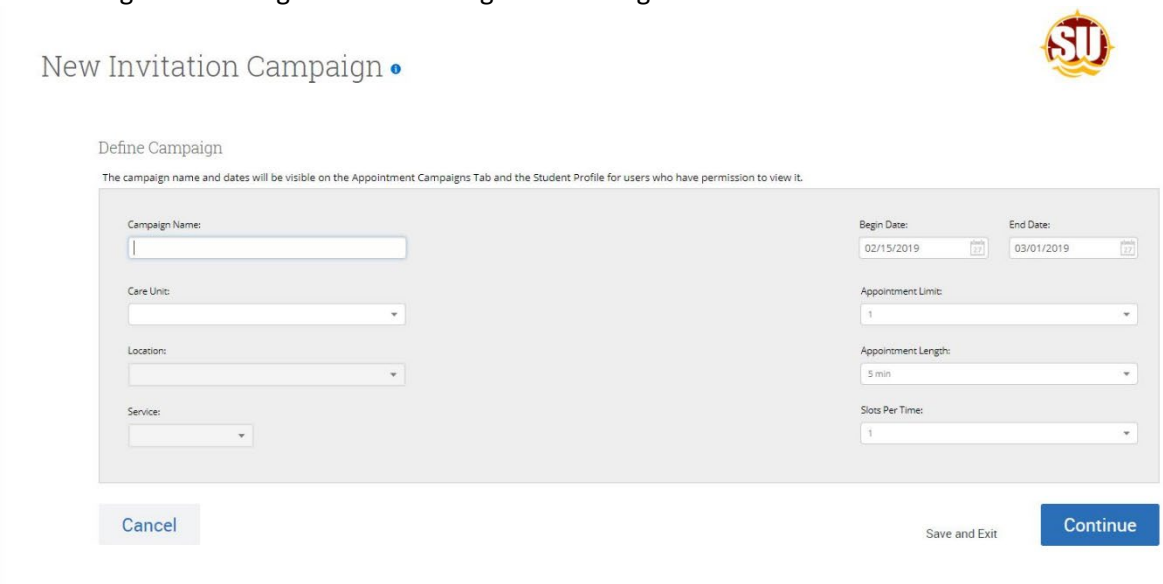
4. **Starting a Campaign:**
Now that you have completed your calendar sync and created availability you are ready to start your Campaigns. To start the process you will need to click on this symbol to access/start a campaign.
Once on the page below is what you should see:



To start an Appointment Campaign you will have to click on the “Appointment Campaign” on the right side of your screen:

The next screen that will appear is “New Invitation Campaign” and this is where you will define your campaign.
When you name your campaign you want to be very strategic because if you plan on running reports to compare data it will help to have them name identical with the different semester codes. For example

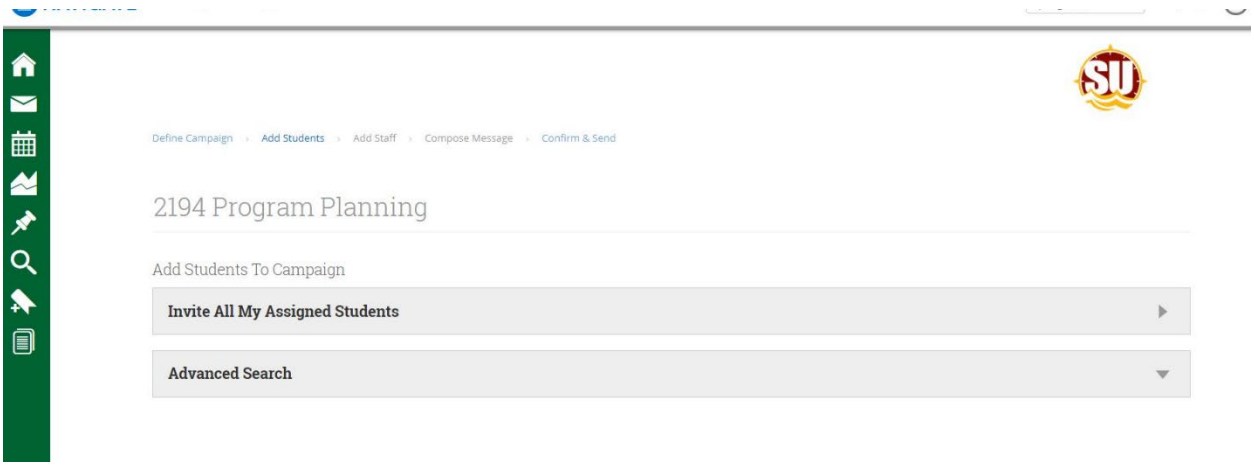
“2194 Program Planning” and “2198 Program Planning”.



After you decide on the name you will fill in each category: Care Unit, Location, Service, Date Range, Appointment limit, Appointment Length and Slots Per Time.

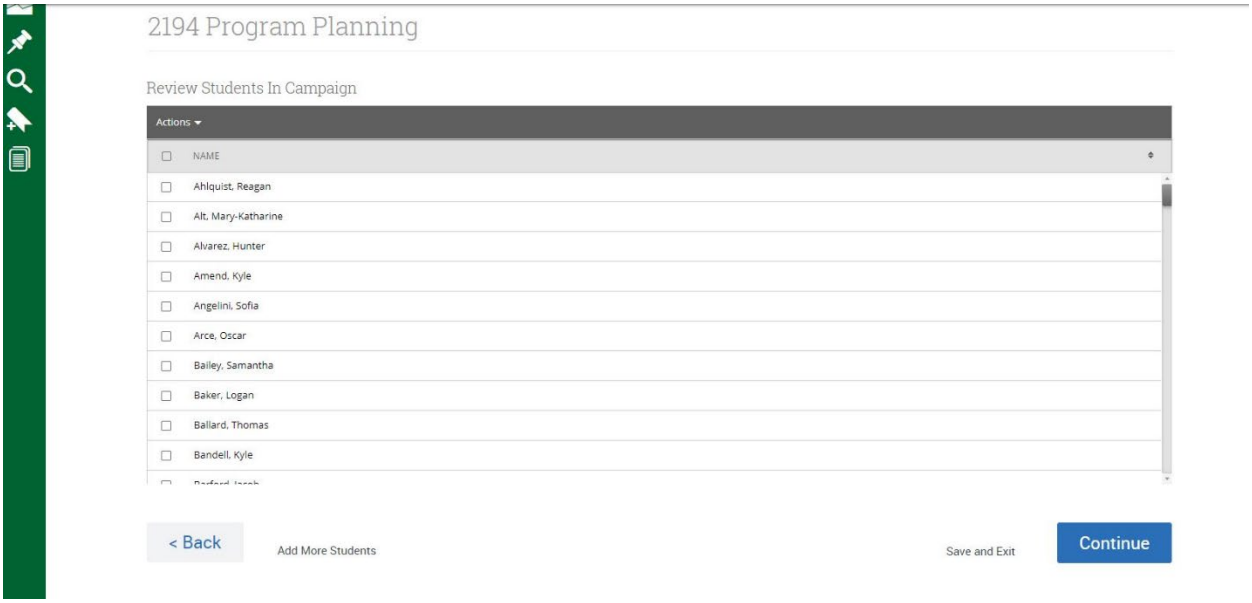
- Appointment limit: This option allows you to give student the ability to schedule more than 1 meeting with you for your campaign.
- Slots Per time: This option is for if you are planning to let more than one student attend a meeting. For example: if you want to have small group sessions you can allow more than one student to sign up for the same time slot.

After you have defined the campaign you will click continue and the next window you will get is selecting the students. You will have two options here: Invite All My Assigned Students or Advanced Search.



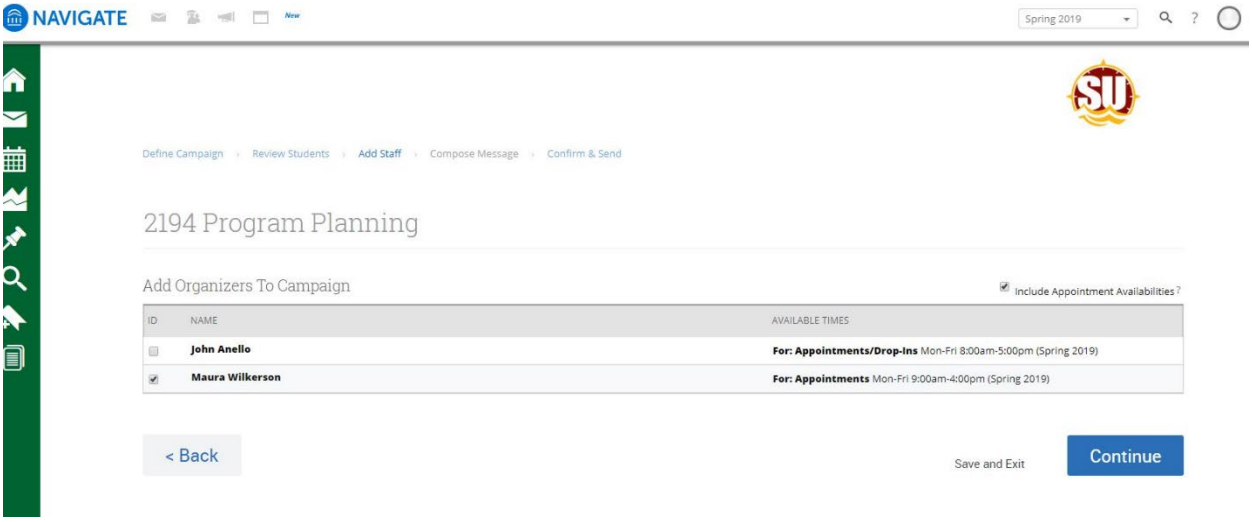
Using the advanced search will be helpful if you are targeting a specific student population examples: Academic Standing, Advisor Assignment, Course Registration, Credit Load.

Whichever option you pick (Assigned student or Advanced Search) you will be able to review your student list to make sure the right students are showing, remove student (Actions drop down) or Add More Students if you notice that someone is missing.



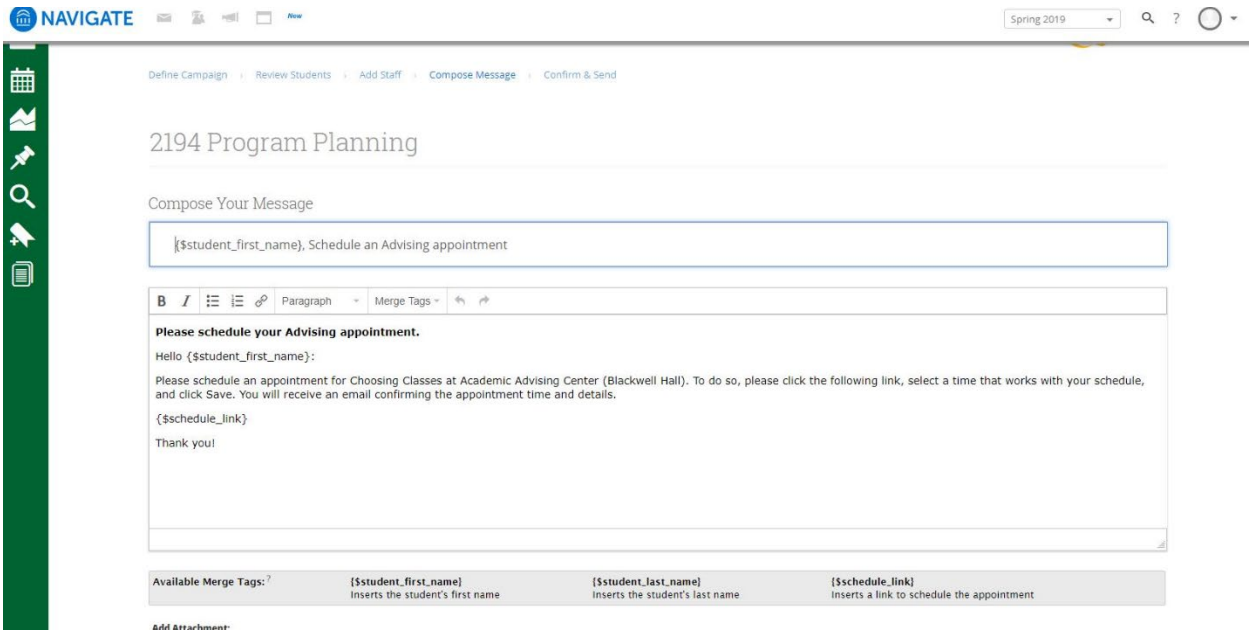
*** Add More Students: If you realize after you have already sent the original campaign you can that you need to add more student, this function will be the best way to send them the invitation. To send them the Campaign you will have to add them to the list, select them and then continue through your campaign in order to send them the invite/send them the campaign***

After you review your student list you will click continue and the next page is "Add Organizers to Campaign". This is where it is very important that you have your Available time setup correctly because if you do not your time will not show up in this window. You will have to select your name to be able to continue to the next step.



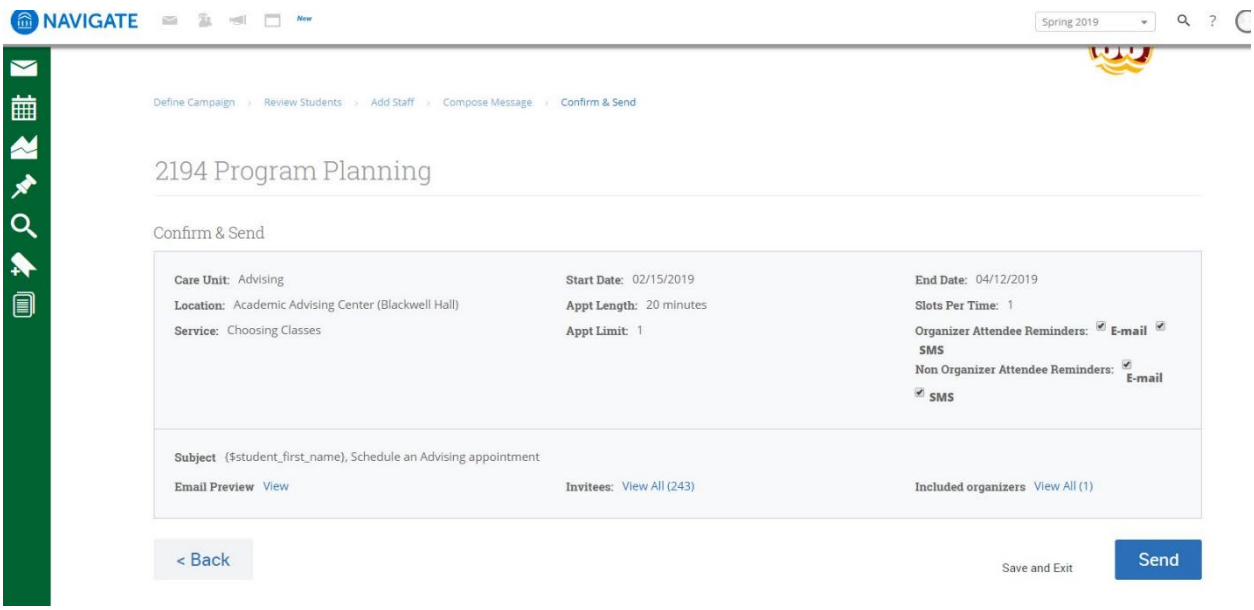
If you do not see your name in this step you will have to Save and Exit to allow you to check your Availability.

Once you have selected your available time, the next step of the process is to compose your message for your Campaign. When composing your message you will want to keep the “Available Merge Tags” for students to be addressed {$student_first_name} and the link {$schedule_link} they will need to schedule the meeting. Beyond those two preset tags you can adjust the message to what suits you best.



On this page you can scroll down to the bottom to view the message as if you were opening it as your student. This allows you to make sure your links are working correctly and that the format is correct for you.

Once you are done composing your message you will click continue to Confirm and Send your campaign.



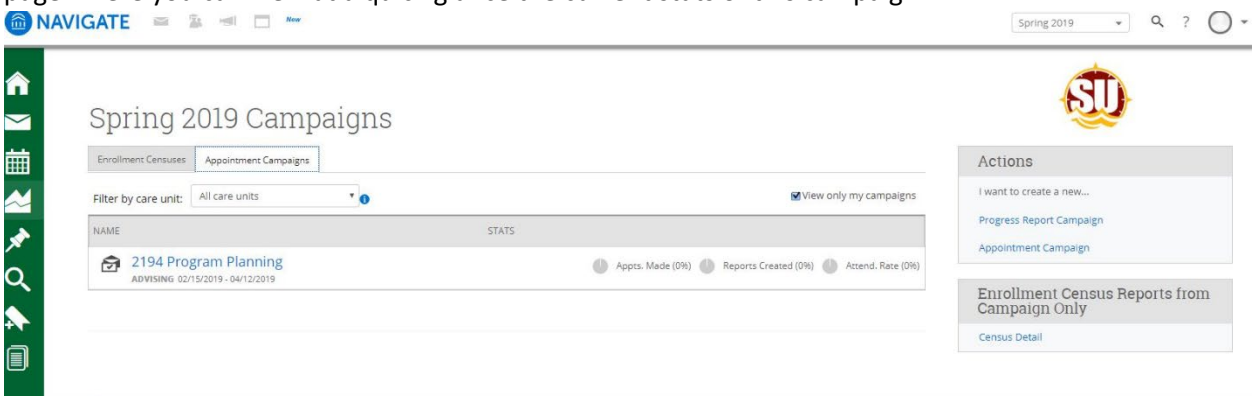
This will be your chance to change anything that doesn't look right and select the reminder setting that you want. As the organizer you can unselect the reminder options because the meeting that are created will automatically appear in your Outlook Calendar.

When you have reviewed everything you will click "Send" and a conformation window will appear.

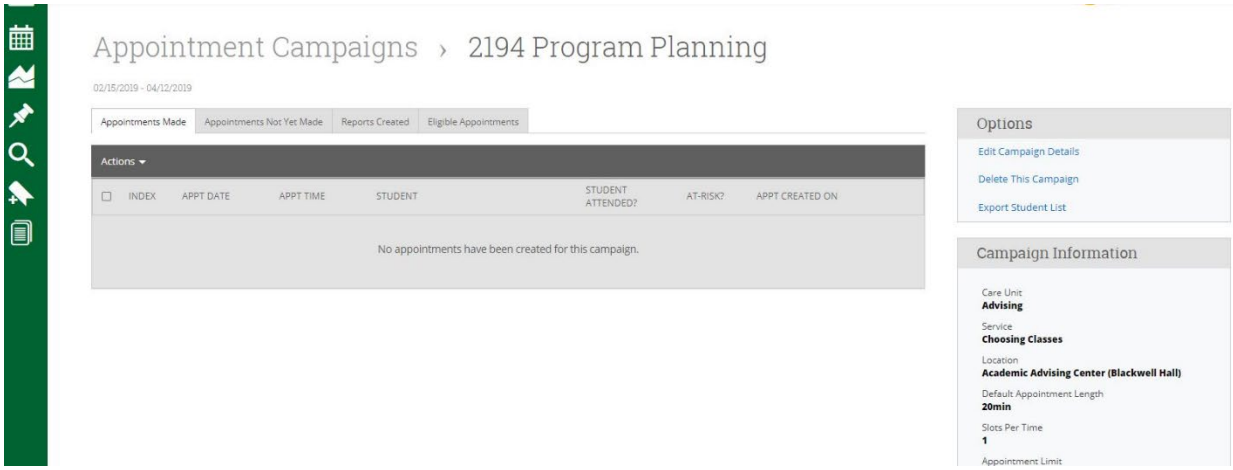
5. **Track your Campaign**

   After you have sent out your Campaign, you can go into your conversations to make sure the message was sent to your students.

   Then to track if students have made an appointment or not you will go back into your Campaign page where you can view at a quick glance the current stats of this campaign:



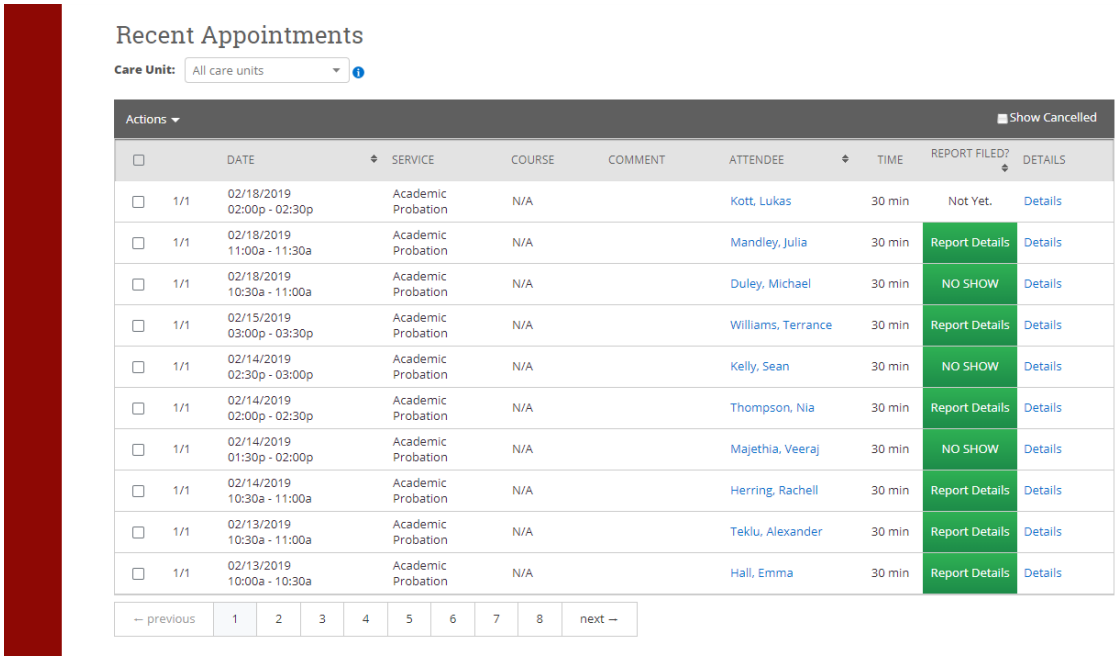
   When you click on the Campaign you created it will look like the below image. You will be able to see the students who have already made meetings, the students who have not, any reports that have been created and other appoints that your students have that could potentially fall within your campaign (Eligible Appointments).



   When reviewing the students who have not created appointments yet, you are able to resend them the Campaign message by click the "Action" drop down menu.

6. **Reporting on Appointments**

When you start meeting with students for your Campaign their Appointments will show up at the bottom of your Navigate home page.



Recent Appointments

Care Unit: All care units

Actions ▾ Show Cancelled

		DATE	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
☐	1/1	02/18/2019 02:00p - 02:30p	Academic Probation	N/A		Kott, Lukas	30 min	Not Yet.	Details
☐	1/1	02/18/2019 11:00a - 11:30a	Academic Probation	N/A		Mandley, Julia	30 min	Report Details	Details
☐	1/1	02/18/2019 10:30a - 11:00a	Academic Probation	N/A		Duley, Michael	30 min	NO SHOW	Details
☐	1/1	02/15/2019 03:00p - 03:30p	Academic Probation	N/A		Williams, Terrance	30 min	Report Details	Details
☐	1/1	02/14/2019 02:30p - 03:00p	Academic Probation	N/A		Kelly, Sean	30 min	NO SHOW	Details
☐	1/1	02/14/2019 02:00p - 02:30p	Academic Probation	N/A		Thompson, Nia	30 min	Report Details	Details
☐	1/1	02/14/2019 01:30p - 02:00p	Academic Probation	N/A		Majethia, Veeraj	30 min	NO SHOW	Details
☐	1/1	02/14/2019 10:30a - 11:00a	Academic Probation	N/A		Herring, Rachell	30 min	Report Details	Details
☐	1/1	02/13/2019 10:30a - 11:00a	Academic Probation	N/A		Teklu, Alexander	30 min	Report Details	Details
☐	1/1	02/13/2019 10:00a - 10:30a	Academic Probation	N/A		Hall, Emma	30 min	Report Details	Details

← previous 1 2 3 4 5 6 7 8 next →

To track if students are attending their meeting or not you will have to select the student and then clickthe “Action” drop down menu and either select “Add Appointment Summary” or “Mark No-show”.

With either option you will have to complete the “Appointment Report” window that opens and then scroll down to click “Save this Report”.

Above is an example of how completed and not completed Appointment reports look on your homepage of Navigate.