Launching a Campaign

Help Center Manager
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Intro: This workflow guide covers how to create and launch one of the three main campaign types: Appointment Campaigns, Progress Report Campaigns, and Enrollment Censuses

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Campaigns and Navigate

Campaigns, particularly appointment campaigns, are a critical part of Navigate workflow. Strategic questions should be asked when creating appointment campaigns, such as:

- How would you like to impact your students with campaigns? What student populations do you envision this would be used for?
- Who should be launching campaigns? Should campaigns be part of each staff member's personal workflow? Or should they be more centralized and launched by unit leaders?
- What guidance do you plan to give to your staff as far as follow-up? If a student does not respond, when is an appropriate time to resend invitation, send email, or text?

Progress Reports allow member institutions to gather feedback on student performance and identify potential barriers to success. Progress Reports proactively request feedback from faculty and strategic questions should also be used when trying to launch them, such as:

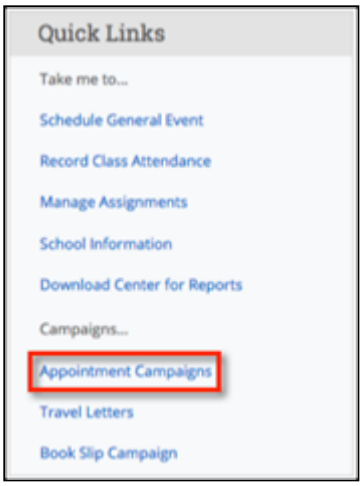
- How would you like your early alert process to change? Who should be accountable for following up on alerts submitted by faculty and staff?
- Progress Reports: who should initiate campaigns? Will this replace any existing process? What expectations do you have of faculty?
- General Case Management: should each alert reason initiate a case? Write our process workflow by each reason? Who owns follow up? Who should receive communication?

Finally, Enrollment Census Campaigns provide information about which students attended class and the date of their last attendance. The information collected here can be very helpful as administrators seek to compile and quantify your institution's attendance at the end of a semester or school year. Consider questions such as:

- How would you use this data? Would faculty be open to receiving this in addition to other requests?
- If you do it, what courses and students would you prioritize?

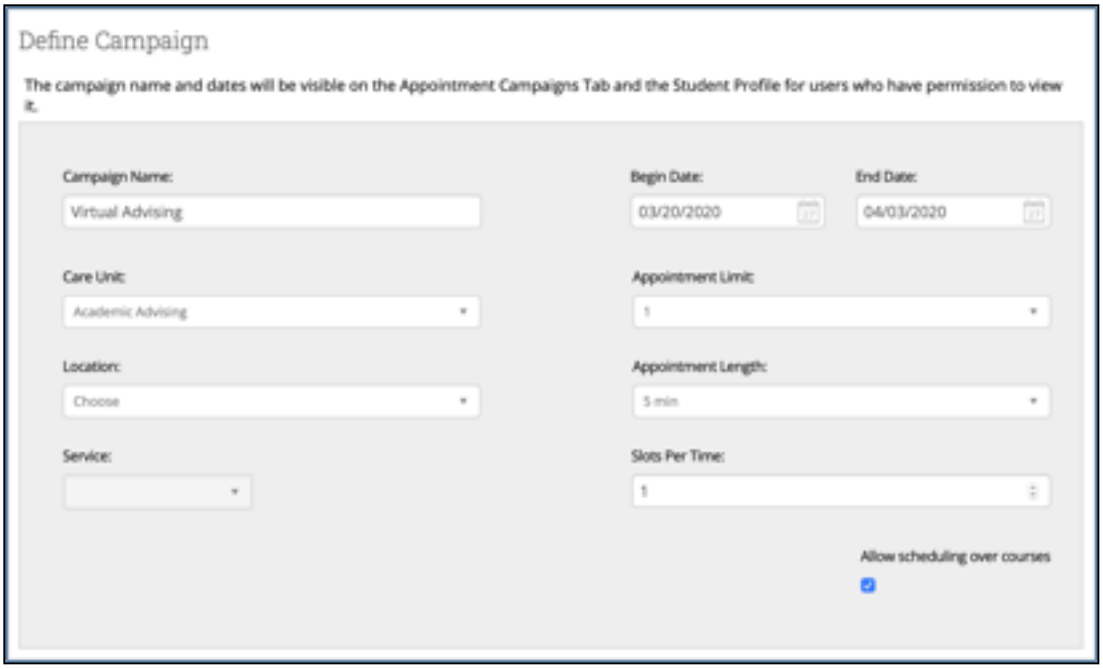
Launching an Appointment Campaign

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. The fields that must be filled out are listed and defined below. Note that if other staff are going to be included on this campaign, the reason/location/date range **must** align with Campaign Availability for the advisor(s) that are going to be included in the campaign.



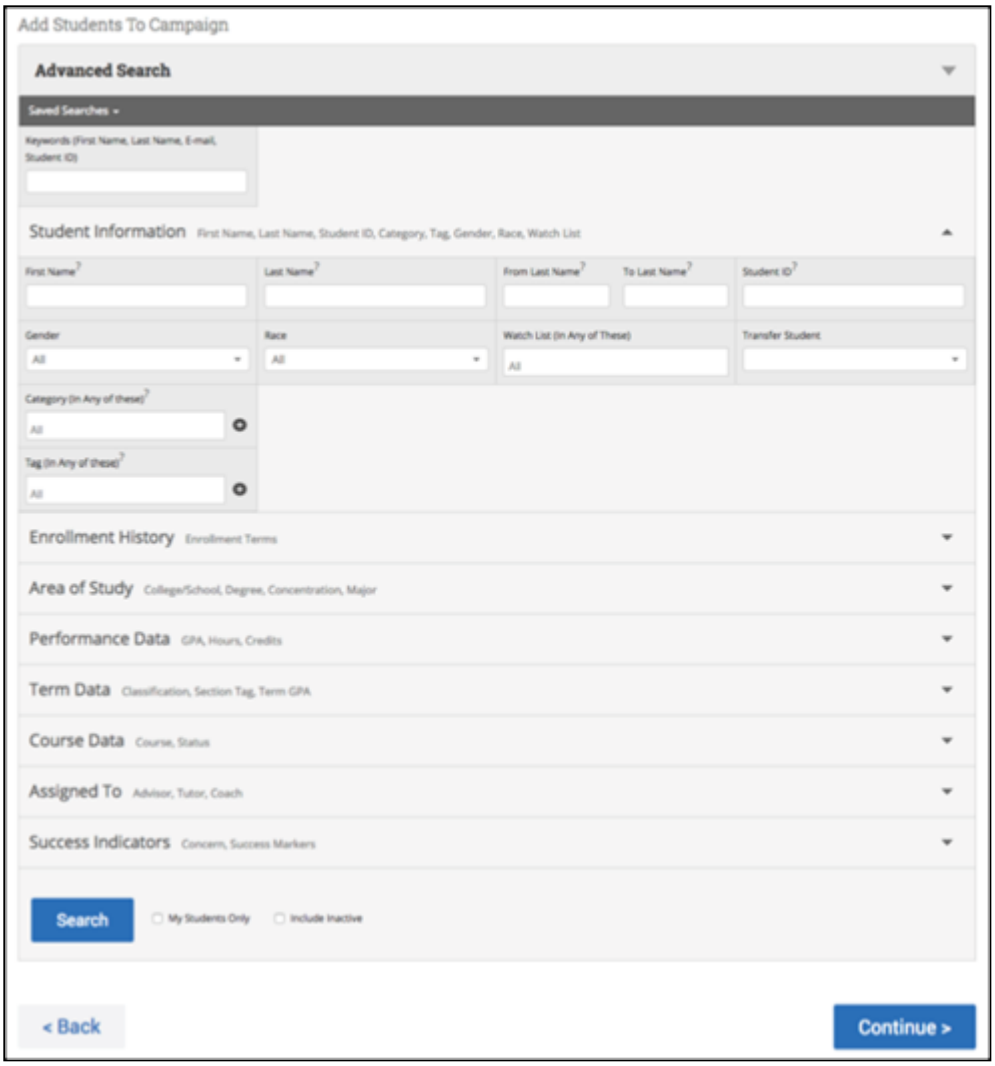
- **Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.
    - Start Campaign names with the most important info (the academic term is the most important!). Some formats could include:
        - Term, Population, Purpose
        - Term, Population, College, Purpose
        - Term, College, Purpose, Last name of user who created the campaign
            - Examples include: “F16 Freshmen Reg Campaign”, “F17 1st Time Freshmen Business 15-to-finish”, or “S18 Freshmen Bio Major Decl, J. Smith”
- **Care Unit:** Select the Care Unit the Appointment Campaign will be associated with
- **Location:** Select the location of 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 here. This will only appear if the Service is tied to a course
- **Begin and End Date:**These are the dates that you want students to start and stop making appointments for the campaign.
- **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.

- **Appointment Length:**This is where you define exactly how long the appointment will be. Durations begin at a 5 minute length and will be determined by your configuration.
- **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.
- **Allow Scheduling Over Courses:** Check this box to allow scheduling over courses. Students will be able to schedule over organizer classes as well as their own. This does not include calendar sync events or other conflicts – this feature ONLY allows students to schedule over courses for themselves and the organizer.

Add Students to Campaign

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding students. If you created this campaign directly from a Student 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.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

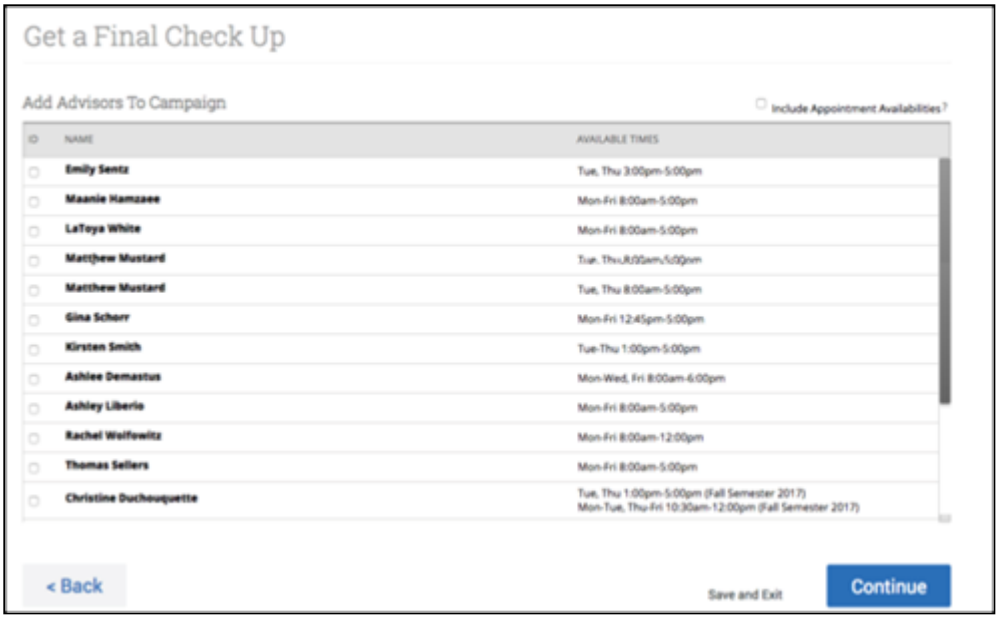
Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.

Add Staff to Campaign

You will need to select yourself as staff for the campaign. You may 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 expected to have availability, make sure their calendars and availability are up-to-date.**

If your school does not use Campaign Availabilities you can check the box to Include Appointment Availabilities to show available advisors. This section will default to search for campaign availabilities first.

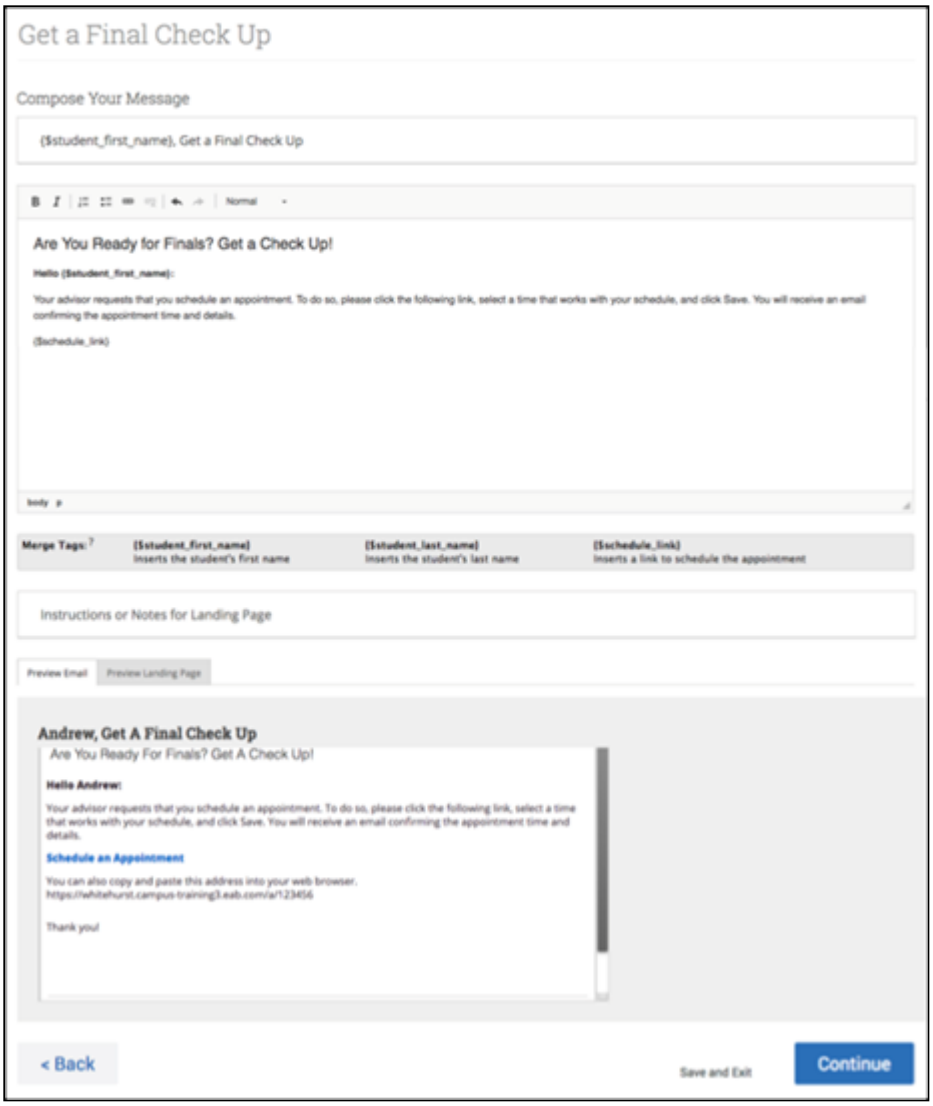


Add staff to the campaign and click **Continue**.

Compose Your Message

Your next step is to compose the message that 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. DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.



Fields used in the message composition are:

Email Subject: The topic will be the subject of the email going to the student.

Instructions or Notes: This will be specific to the landing page students will be 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!

Confirm and Send

Review your campaign details, invitees, and advisors on this page.

Click **Send** when you are ready to email the invites to the selected students.

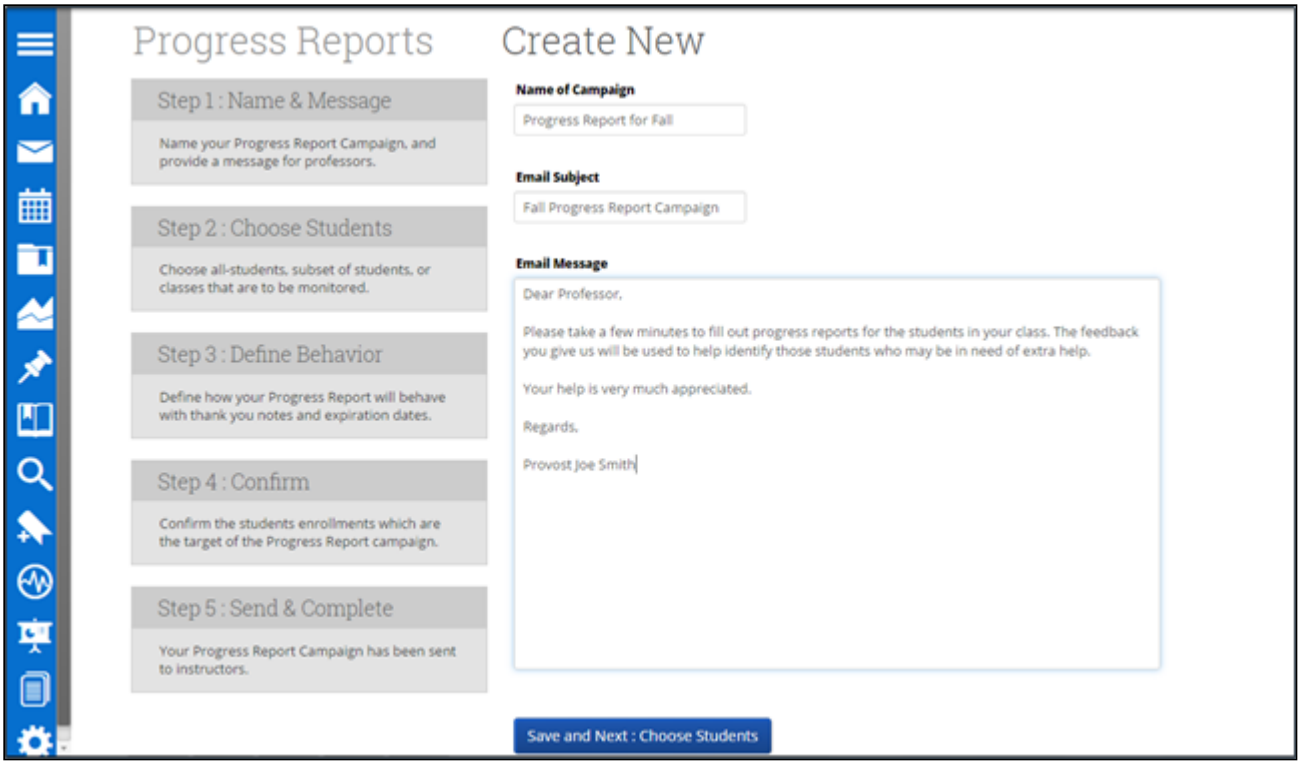
Launching a Progress Report Campaign

Progress Report Campaigns allow you to gather feedback from faculty to help determine which students may need intervention.

To get started, click the Campaigns icon. Then select **Progress Report Campaign** from the Actions menu.

Name & Message

The first step is to name your campaign, define the subject of your email, and write your message. We have listed the fields to fill out below.



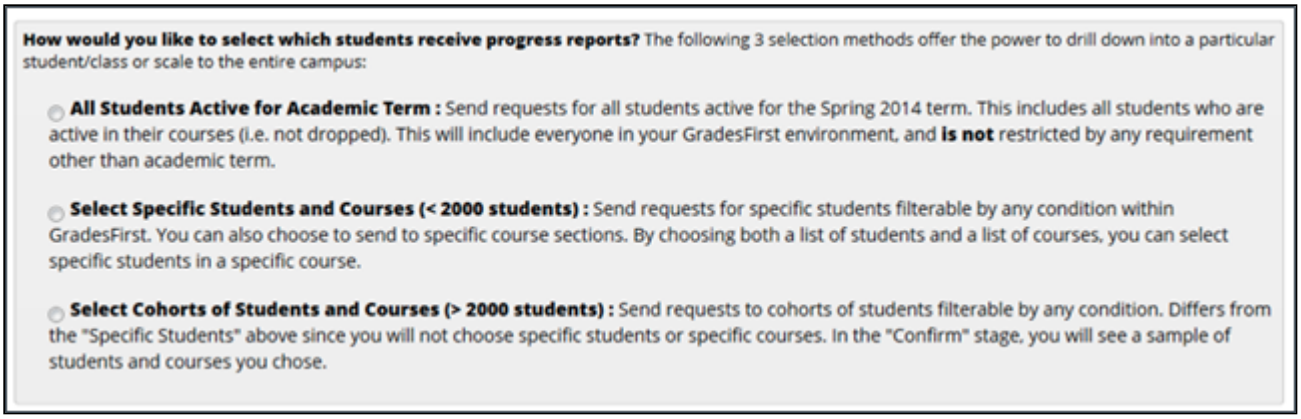
Name of Campaign: This is the name of your campaign and will be visible on the Campaign tab.

Email Subject: This is where you will define the subject of the email your staff will see.

Email Message: This is where you write the message that will be sent to your faculty. We recommend a brief message summarizing what you are asking them to do. It is also a good idea to give your faculty a “heads up” notification/email so they know exactly what a progress report is and what your expectations are.

Choose Students or Courses

Choosing which students/course sections to include in the progress report campaign is critical for campaign success. You can select specific groups of students or entire cohorts as defined below.



Potential Selections:

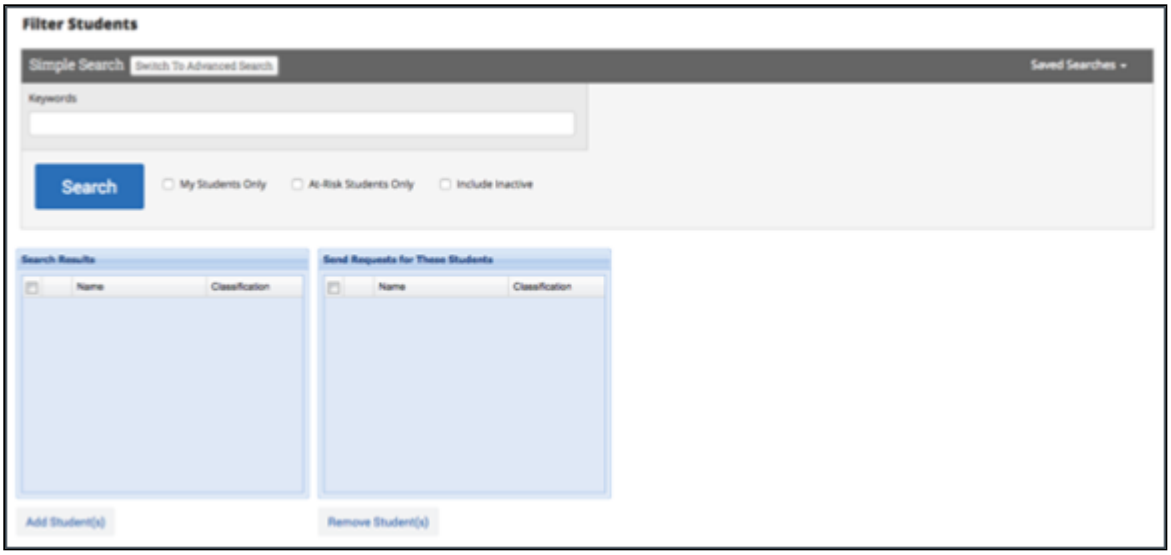
All Students Active for Academic Term

This will create a progress report campaign for all students enrolled in the active term.

Select Specific Students and Courses (<2000 students)

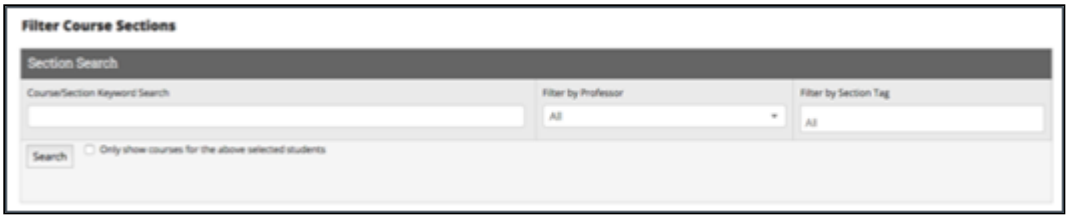
This option should be used when sending a progress report campaign for a selective group (or cohort) of less than 2000 students. Examples of a group include all students on the Men's Football or Women’s Tennis team.

When you click this option, the bottom half of the page opens up giving you a filter for both students and classes.



In the Filter Students section, you can find students based on a simple keyword search OR use Advanced Search features. You may also use a saved search.

You can ALSO use the Course Sections filter either independently of, or in conjunction with, the Student filter. For example, I could choose to run my campaign for only Math courses for my Football and Women's Tennis students. I would just need to search for and select all the Math courses and then click the **Next: Define Behavior** button.



When using the Course Section filter in conjunction with the Student filter, we have a checkbox option called **Only show courses for the above selected students**. When checked, this option will only display courses that are currently being taken by your selected students. Users could then select only Math courses for the student athletes in the campaign. Narrowing down the course list this way is a lot easier than searching your entire course catalog for all Math courses.

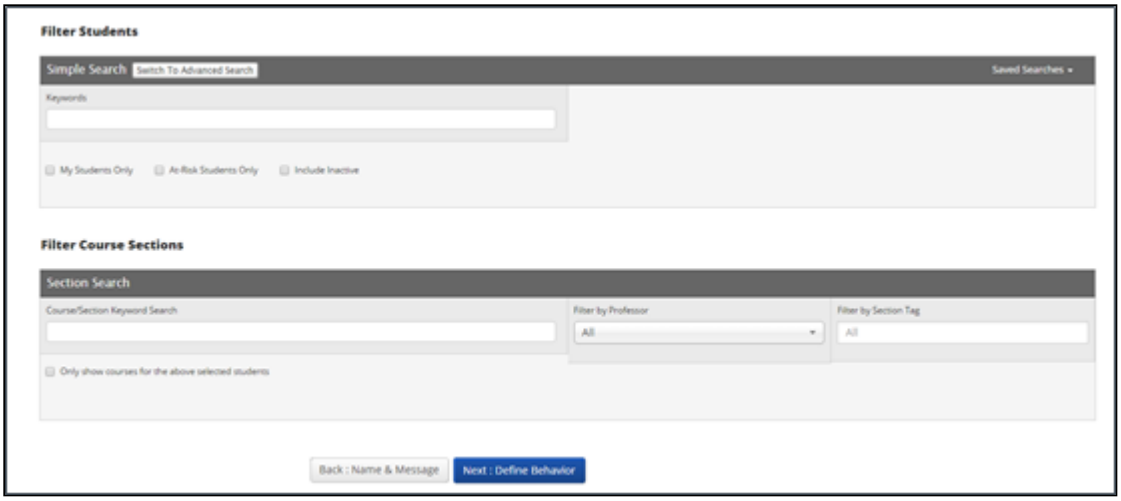
The course filter can be used independently of the student filter to create a campaign for ANY student in certain courses. To do this, do not select ANY students via the student filter and only search for and select the appropriate courses via the Course Section filter.

Users can also filter by Section Tags. A Section Tag is an optional identifier if there is a need to distinguish between the types of course section (ex. Lab, Lecture or various sessions within a term – 3 week, 5 week, and 8 week). These can be generated and imported directly from your institution's SIS.

Once all of your students and courses have been selected, click the **Next: Define Behavior** button to move to the next step.

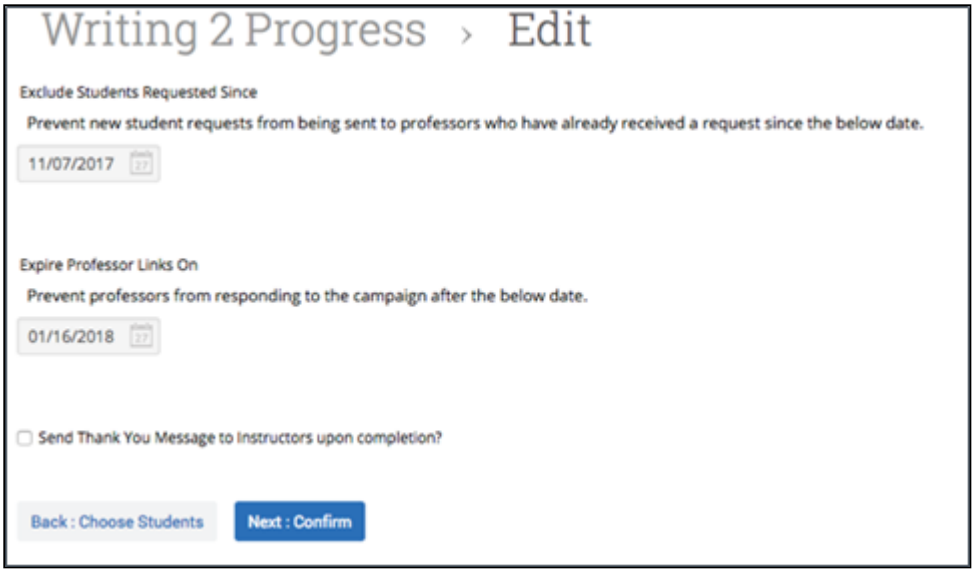
Select Cohorts of Students and Courses (>2000 students)

This is the third method of selecting which students should be included in your progress report campaign. This option should be used when sending a campaign for a selective group (or cohort) greater than 2000 students. For example, all freshman and sophomores. Checking this option opens up the filters shown below.



Define Behavior

These next options are more administrative in nature. The options are explained below.



Exclude Students Requested Since: This date is used to ensure duplicate progress report requests are not sent to the same professors for the same students in the event a second campaign is sent. For example, if a progress report is created and sent on 11/1, and you upload your latest schedule changes on 11/5, therefore adding (and removing) students to classes. With an updated roster in Navigate, you may want to send out another progress report campaign to ensure those newly added students are also evaluated. In theory, you would not want the professors to have to re-evaluate all students again. So to prevent this, we have the ability to exclude those students

already evaluated from appearing in this second campaign. All that needs to be done, in this example, is when you create your second campaign, enter the date of 11/1, which tells Navigate to exclude the students who have already been evaluated from the professors list.

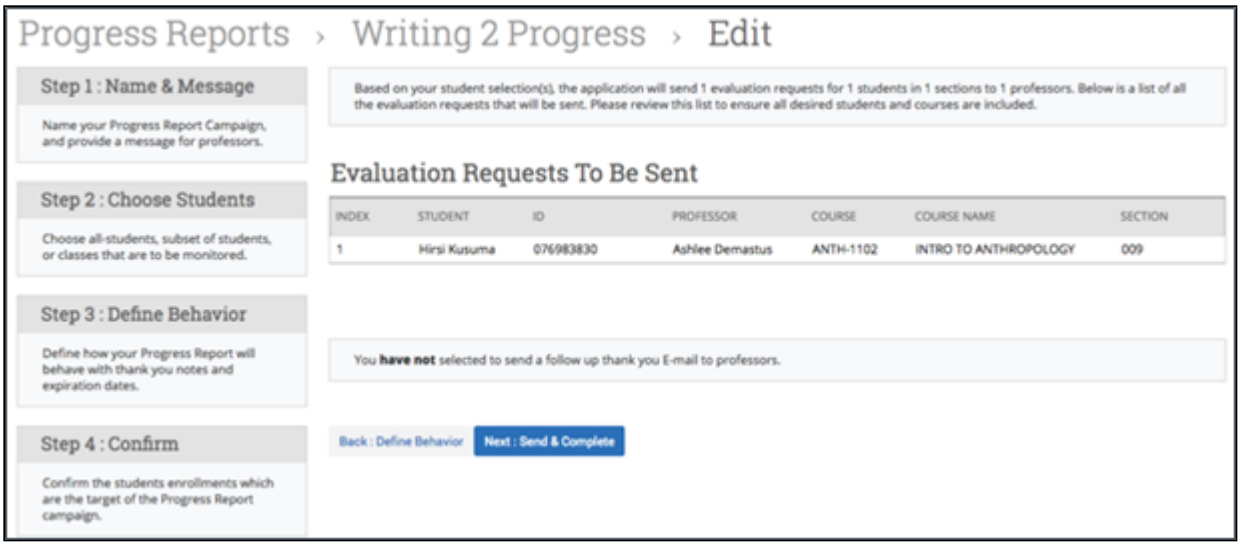
Expire Professor Links On: This is essentially your progress report campaign expiration date. Simply select the date you wish for any unfiled professor evaluations to expire on. If a professor tries to access the campaign after that date, they will be notified that the “link has expired.”

Send Thank You Message to Instructors upon Completion? Check this box if you wish for Navigate to automatically send a “thank you” email to each professor that completes their evaluations. When checking this box, you will be able to define both the subject and message of the email. And as each professor completes their evaluations, they will automatically receive your thank you email.

Click **Next**: **Confirm** to move to the next step.

Confirm

This final page will give you a detailed count of how many students, professors and course sections will be included in your campaign. A complete list of your included students will also be displayed.



The summary at the top details exactly how many students, course sections, and professors that are included in your campaign.

Evaluation Requests to be Sent: We also added the ability to preview the list of students who are to be included in your campaign. The list of students will display in this section.

What happens if I don’t see any students in my list? Depending on how large your campaign is, this grid may populate instantaneously or it may take several hours. But in either case, you will not be able to click ‘Next: Send & Complete’ until your students populate in this grid. If this process

takes a while, you do not have to wait on this page while your campaign is being built. Users can continue using the site when your list and do other things in Navigate.

If everything looks good, click the **Next: Send & Complete** button to complete and send your progress report campaign.

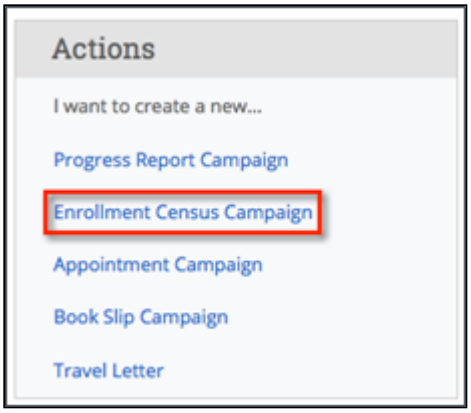
Launching an Enrollment Census Campaign

The Enrollment Census campaign will provide information about which students attended class and the date of their last attendance. The information collected here can be very helpful as administrators seek to compile and quantify your institution's attendance at the end of a semester or school year.

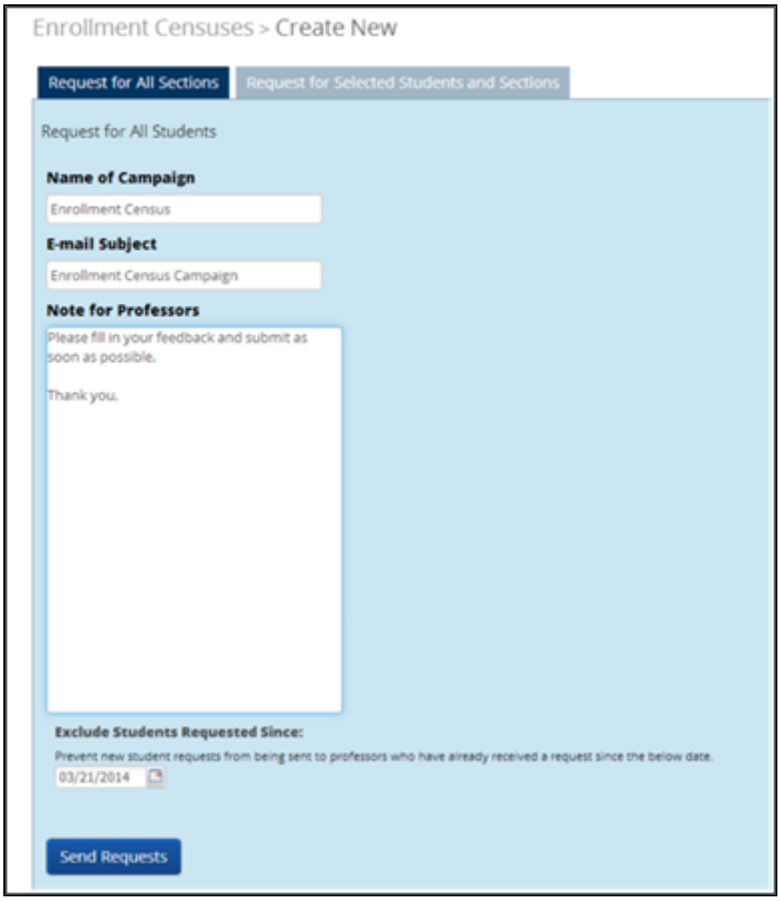
Enrollment censuses are often run during the early weeks of the term to check that students are meeting SAP requirements to continue being eligible for their financial aid. In addition, institutions may be ensuring that students are going to class in those early weeks where they could catch a student who may have a homesickness or other issue that's causing them to miss class early on in the term.

If you have created a progress report campaign before, this process is very similar.We also have a guide to how to create and launch Enrollment Census Campaigns attached to this article.

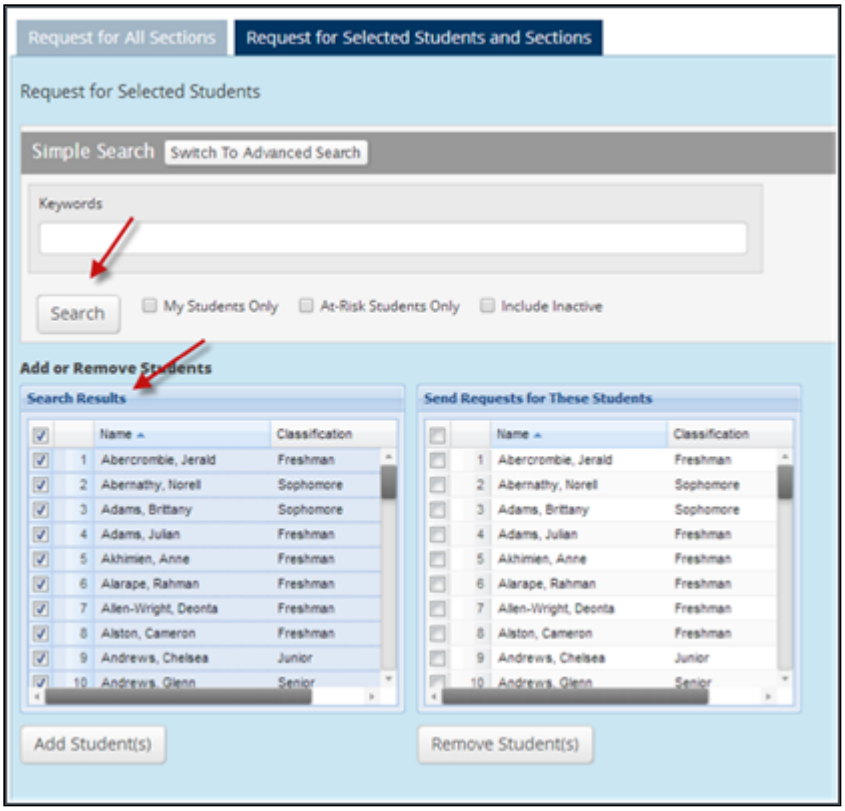
Click **Enrollment Census Campaign** on the Actions menu in the Campaign tab.



The Create New Enrollment Census page opens and displays.

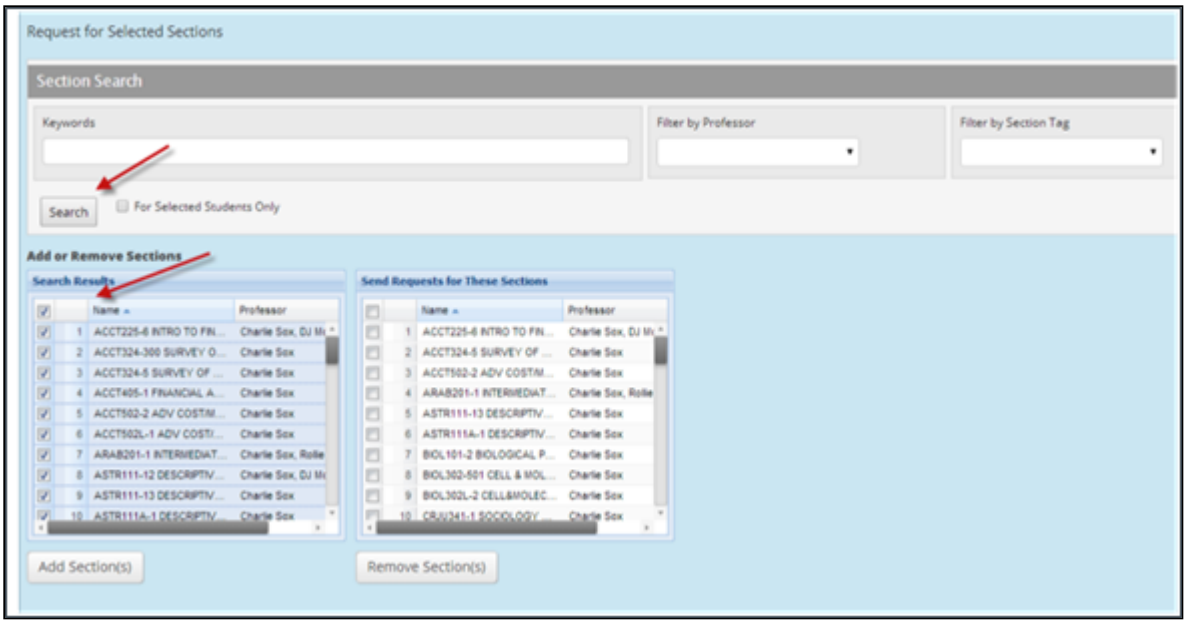


There are two tabs: Request for All Sections or the Request for Selected Students and Sections.



First you will want to search for the students you would like to send the campaign for by using the Advanced search option that includes filters and search criteria, or by simply clicking the Search

button. Now, select the students in that list and click Add Students. The students should now be listed on the right.



Next, let's search for the selected sections. Use the Filter by Professor, Filter by Section Tag options. Section Tags are optional tags for class sessions. For example, 5 week courses, 8 week courses, 15 week courses, might be marked. If an institution wants to only poll faculty teaching courses in those sessions, you need to filter by Section Tag. The Section Tags are also used by some members to filter by lab, lecture, workshop, etc.

You can also click Search and select in the list the sections you would like to add to your campaign. Then click **Add Sections**. They should now be listed on the right. Once you have completed your campaign details, click **Send Requests**.

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Louise Lalli

0

i want to remove a student from a campaign after it has launched.

Community Manager

0

Hello Louise,

You can remove a student from a campaign by editing the campaign details.

You can do this by clicking on the campaign, then under *Options*, click *Edit Campaign Details*. Click the *Edit* button next to *Student Select.*

Check the box next to each student you want to remove, click *Actions*, then click *Remove Selected Users*.

Let me know if you have any other questions!

Best,

Jessie (Community Manager)