

## Creating Campaigns

- Click on the Campaign icon (looks like mountains) on the left menu.

The screenshot shows the NAVIGATE Staff Home interface. A blue arrow points to the 'Campaigns' icon (mountains) in the left-hand navigation menu. The main content area shows a table of 'My Assigned Students for Fall 2019' with columns for Student Name, ID, Watch List, Cumulative GPA, and Predicted Risk Level. On the right side, there are 'Quick Links' and 'Upcoming Appointments' sections.

- Click appointment campaign link in the Actions box on the far right side of the page.

The screenshot shows the 'Fall 2019 Campaigns' page. The page title is 'Fall 2019 Campaigns'. Below the title, there is a filter by care unit dropdown set to 'All care units'. The main content area is empty, displaying the message: 'You have not created any appointment campaigns. Click the link to the right to get started.' On the right side, there is an 'Actions' box with a link for 'Appointment Campaign' highlighted by a blue arrow.

- You will be asked to define the campaign. In the spaces available:
  - Provide a campaign name.
    - NAVIGATE Campaign Naming Conventions**
      - TERM** (Fall 2019, Spring 2020, etc.)
      - COLLEGE** (CAM, CITE, COEPD, COHP, COLA, COS, LCOB, RBA, UC)
      - PURPOSE** (ADV, SCHED, SR-EVAL, JR-EVAL, GR-CHECK, PROB, AIP, SUSPENSION, etc.)
      - ADVISOR** (First Initial, Last Name: C. Atkins)
        - EXAMPLE 1:** Fall 2019 UC ADV C. Atkins
        - EXAMPLE 2:** Fall 2020 CAM GR-CHECK T. Reynolds
  - Select a "Care Unit" (Advising).
  - Select a "Location" (College)
  - Select a "Service" the Care Unit, Location and Service must match your availability
  - Select a begin date and end date (how many days/weeks do you want the campaign to be active). Students can schedule their appointment times during the selected time period. The campaign link is only active from the time you send the campaign email through the end of the selected campaign period. If the student selects the link after the selected campaign dates have ended, the student will receive an error message.
  - Select "appointment limit" (you probably want 2). This is the number of times a student can schedule an appointment through the campaign link. We recommend 2 in case the student needs to cancel or is unable to attend the appointment, the student can select another appointment time.

- Select the length of the appointment to be scheduled (10, 15, 20 minutes, etc.) We recommend 30 minutes to avoid gaps in your calendar.
- Select the number of “slots per time” (you probably want one student at a time).
- Click “continue.”
- At this point, you can choose “Invite All My Assigned Students” or select an “Advanced Search” to narrow the selected population. If you select all assigned students, this will include any student with your name as assigned advisor in Banner who is currently enrolled. If you want to select a different set of students, you need to select the “Advanced Search” option. If you want to select a subset of your assigned students, there are multiple options. (See advanced search instructions.)
- You now have the opportunity to review the list of students you selected for the campaign. These are the students who will be able to click the link to schedule an appointment with you. If additional students should be added, click “Add More Students.” If you want to remove students, click the check box next to his or her name, click the “actions” button and select “remove selected users.” If the list is correct, click “continue.”
- You then must select at least one advisor for the campaign. Click the box next to the advisor’s name.
- Click “continue.”
- You now have the opportunity to compose your message that will be sent via email to your selected population. You can customize the body of the text as well as the subject line; however, you cannot edit anything inside the brackets as these are reserved for the mail merge process. The email will include a link for the student to follow and select a meeting time. The landing page (where the link is directed) will show the same text as the email.
- Click “continue.”
- You can now view all of the campaign information you selected. If all is correct click send.

How does a student request an appointment outside of the campaigns?

- At this time, students do not have direct access to the SSC platform. Students can request an advising appointment via the SSC Navigate application on their mobile devices that correspond with your appointment availability. It is important to note that appointment availability can be different from your campaign availability.
- In addition to your set time of availability, appointment access is limited by appointments on your Outlook calendar, your class meeting times, as well as the student’s class times (all courses).