

Create Appointment Campaign in Navigate360

1 Log into Navigate

The screenshot displays the 'Staff Home' dashboard in the Navigate360 system. At the top, a blue header bar reads 'UNIVERSITY OF HOUSTON-CLEAR LAKE'. Below this, a navigation bar includes the 'Navigate360 | STUDENT SUCCESS' logo, several utility icons (people, mail, calendar, search), and a search input field. A left-hand sidebar contains a vertical list of icons for home, calendar, mail, calendar, folder, calendar, mail, and a plus sign. The main content area is titled 'Staff Home' with a user profile icon. Below the title is a horizontal menu with tabs for 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. The 'Assigned Students' section is active, featuring filters for 'List Type' (Assigned Students), 'Term' (Spring 2024), and 'Relationship Type' (All Relationship Types). At the bottom, a dark grey 'Actions' bar is visible, and a table header row lists columns: NAME, ID, STUDENT LIST, CUMULATIVE GPA, PREDICTED SUPPORT LEVEL, CATEGORY, and EARNED CREDITS.

2 Click "Campaigns"

The screenshot shows the 'Staff Home' dashboard. At the top, there are navigation tabs: 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. Below these is the 'Assigned Students' section with filters for 'List Type' (set to 'Assigned Students') and 'Term' (set to 'Spring 2024 (Default T...)'). A sidebar on the left contains several icons, with the 'Campaigns' icon (a megaphone) highlighted by an orange circle. A tooltip box is visible over the 'Campaigns' icon, containing the text 'Campaigns' and 'Type: All Relationship Types'. Below the sidebar, a table header is visible with columns: 'NAME', 'ID', 'STUDENT LIST', 'CUMULATIVE GPA', 'PREDICTED SUPPORT LEVEL', 'CATEGORY', and 'EARNED CREDITS'. The table body is empty, displaying the message 'No matching records found'.

3 Click "Appointment Campaigns"

The screenshot shows the 'Campaigns' page. It is divided into two main columns: 'Student Campaigns' and 'Staff Campaigns'. The 'Appointment Campaigns' section under 'Student Campaigns' is highlighted with an orange circle. This section includes a description: 'Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.' Below the description is a blue button labeled '+ Add New'. The 'Staff Campaigns' section includes a description: 'Staff Campaigns are campaigns to Staff users to complete a specific outcome for each campaign.' Below this is another blue button labeled '+ Add New'. The page also shows the start of a section for 'Enrollment Census Ca'.

4 Click "Add New"

campaigns

+ Add New

View only my campaigns

RECIPIENTS APPTS SCHEDULED APPTS ATTENDED SUMMARIES CREATED

appointment campaigns have been created for this term.

5 Click "Enter Campaign Name"

Define Campaign

Set up your campaign. Specify your appointment details and timing.

Campaign Configurations

Campaign Name * Instructions or Notes for Landing Page:

Care Unit: * Location: *

Service: *

Appointment Configurations

6 Click "Select a Care Unit"

The screenshot shows the 'Campaign Configurations' form. The 'Campaign Name' field contains 'Sample_probation students'. The 'Care Unit' dropdown menu is open, showing a list of options: 'Advising' (highlighted with an orange circle), 'Center for Student Advocacy and Community', 'Former Coaching Care Unit', 'Orientation and New Student Programs', 'Student Job', and 'Student Success Center'. Other fields include 'Instructions or Notes for Landing Page', 'Location' (set to 'Select Location'), and 'Appointment Length' (set to '30 min').

7 Click "Select a Location" and select your location

The screenshot shows the 'Appointment Configuration' form. The 'Location' dropdown menu is open, showing a list of options: 'Academic Advising -UHCL Pearland Campus' (highlighted with an orange circle), 'Business Advising', 'Education Advising', 'Exploring Majors Office', 'Human Sciences & Humanities Advising', and 'Science & Engineering Advising'. Other fields include 'Appointment Name' (set to '_probation students'), 'Instructions or Notes for Landing Page', 'Service', 'Appointment Limit', and 'Time'.

8

Click "Select a Service" to choose the service you want students to schedule an appointment for.

Advising x v Business Advising x v

Service: *

Select Service ^

- Candidate Plan of Study (CPS)/My Degree Requirements
- Changes to my Schedule
- Choose Classes for Next Semester**
- First Semester Advising
- First Semester Mandatory Advising
- Graduate School Questions

Appointment Length: *

30 min x v

Allow Scheduling Over Courses

Staff Reminders: Email Text

Recipient Reminders: Email Text

9

Select your other Appointment Configurations. The configurations shown below are recommended under a 1 student per appointment setting. Keep in mind that **Appointment Limit** is How many appointments you want students to schedule during the campaign - please refer to your supervisor or colleagues when entering this number. Many departments set this limit to 3 in case students schedule an appointment but don't attend and need to schedule another one through the link you will send them as part of this campaign. **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** If checked, this box lets students schedule over course conflicts. *Course conflicts* refer to time slots where the student has class scheduled. **Staff and Recipient Reminders** These checkboxes select what kinds of Appointment Campaign notifications the staff and students attached to the campaign will receive.

Service: *

Choose Classes for Next Semes X ▾

Appointment Configurations

Appointment Limit: * 1 X ▾

Appointment Length: * 30 min X ▾

Slots Per Time: * 1 X ▾

Allow Scheduling Over Courses

Staff Reminders: Email Text

Recipient Reminders: Email Text

Scheduling Window

10

Set your start and end dates for this campaign this is the date range that you want students make campaign appointments for.

Staff Reminders:

Email Text

Recipient Reminders:

Email Text

Scheduling Window

Campaign appointments and events can be scheduled on any date within the scheduling window. For one-time events, select the same date for the start and end dates. Your campaign will begin automatically on the date of your first nudge.

Start Date *

June 27, 2024 ▾

End Date *

April 15, 2024 ▾

Launch Date

This Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.

Launch Date *

April 1, 2024 ▾

11

Select your Launch

Start Date *

June 27, 2024 ▾

End Date *

August 29, 2024 ▾

Launch Date

This Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.

Launch Date *

April 1, 2024 ▾

Cancel

Save and Exit

Continue >



[Privacy Policy](#) | [Legal Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#)
© 2024 EAB. All Rights Reserved. Release Version: 24.5.2

Page last refreshed
All times listed are

12 Click "Continue"

End Date *

August 29, 2024

be the date that the "Welcome Message" will send. If students are added to your launch date via Automation, the "Welcome Message" will send to that student as of the date.

Save and Exit

Continue >

[Legal Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#)

Page last refreshed at 4:22pm
All times listed are in Central Time (US & Canada)

Support

Copyright Reserved. Release Version: 24.5.2

13 Set your student audience for this campaign. We recommend utilizing the "Advanced Search" tool to identify your audience before setting up a campaign and saving the students under a list. If you take the suggested route, you will be able to see your list under the "Student List" field. However, for this example, we will identify our audience as we are building the campaign. I am selecting "Academic Probation" under the "Category" field to select students on probation.

Race or Ethnicity: All

Preferred Name: [Text Field]

Student List (In Any of These): All

Transfer Student: Any

E-mail(s): [Text Field]

Category (In Any of these): Academic Probation (PROB)

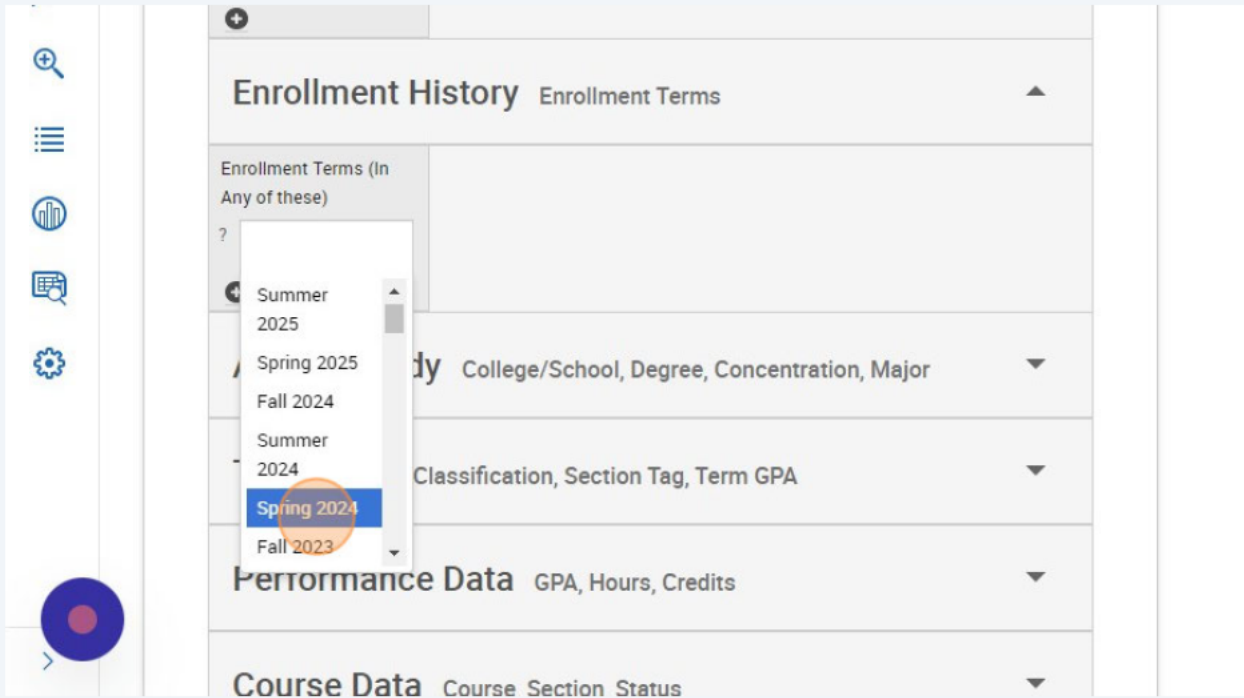
Tag (In Any of these): All

Enrollment History: Admit Term: 0770 (0770NE)

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

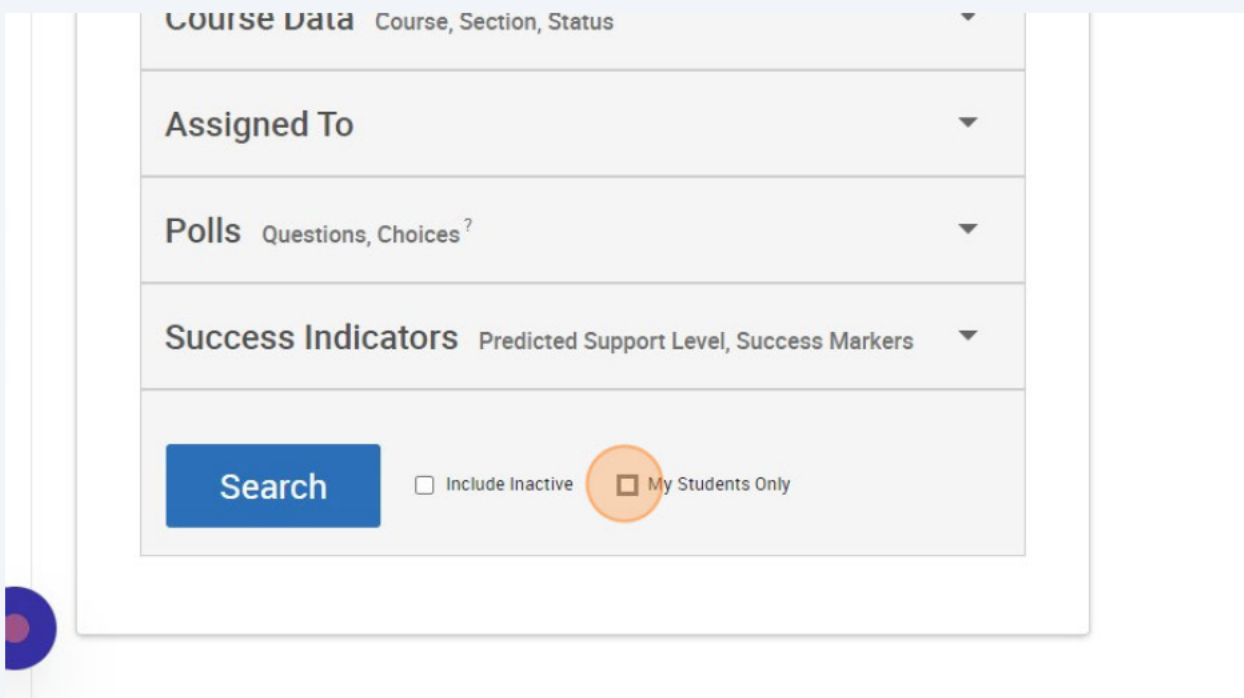
14

Click the "Enrollment Terms (In Any of these)" field and I selected "Spring 2024" because I only want students that are on probation for the current semester (Spring 2024).

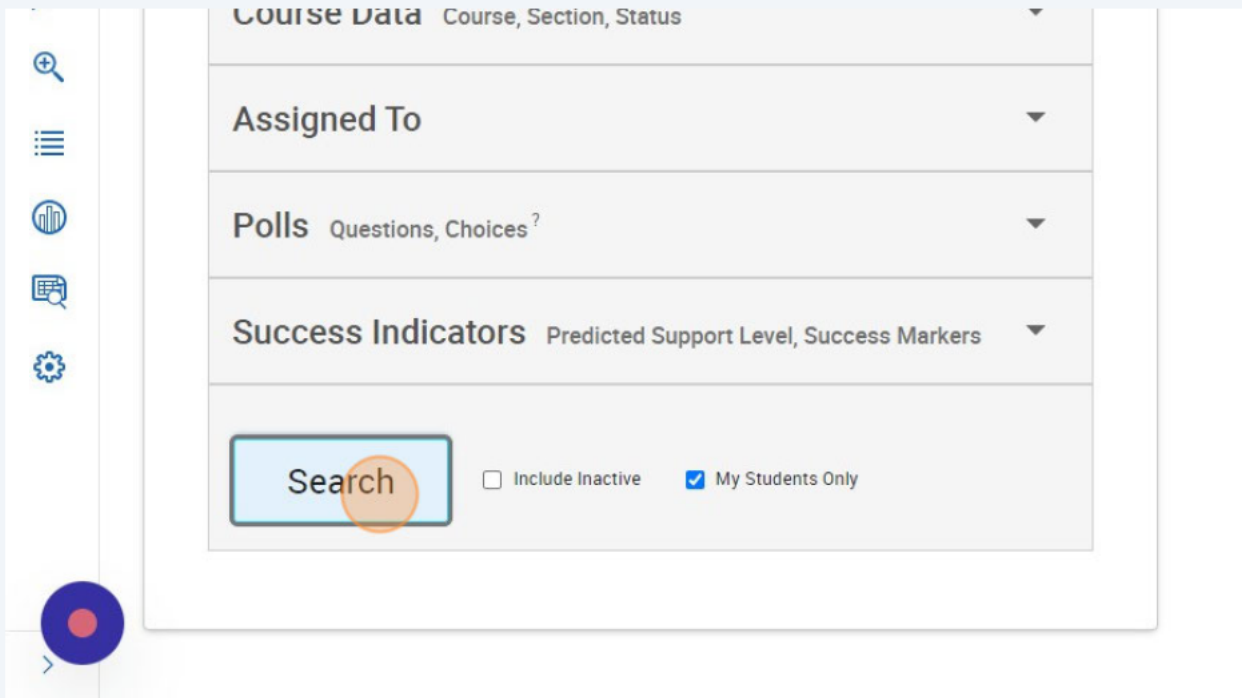


15

Click the "My Students Only" field if you only want to see your assigned students

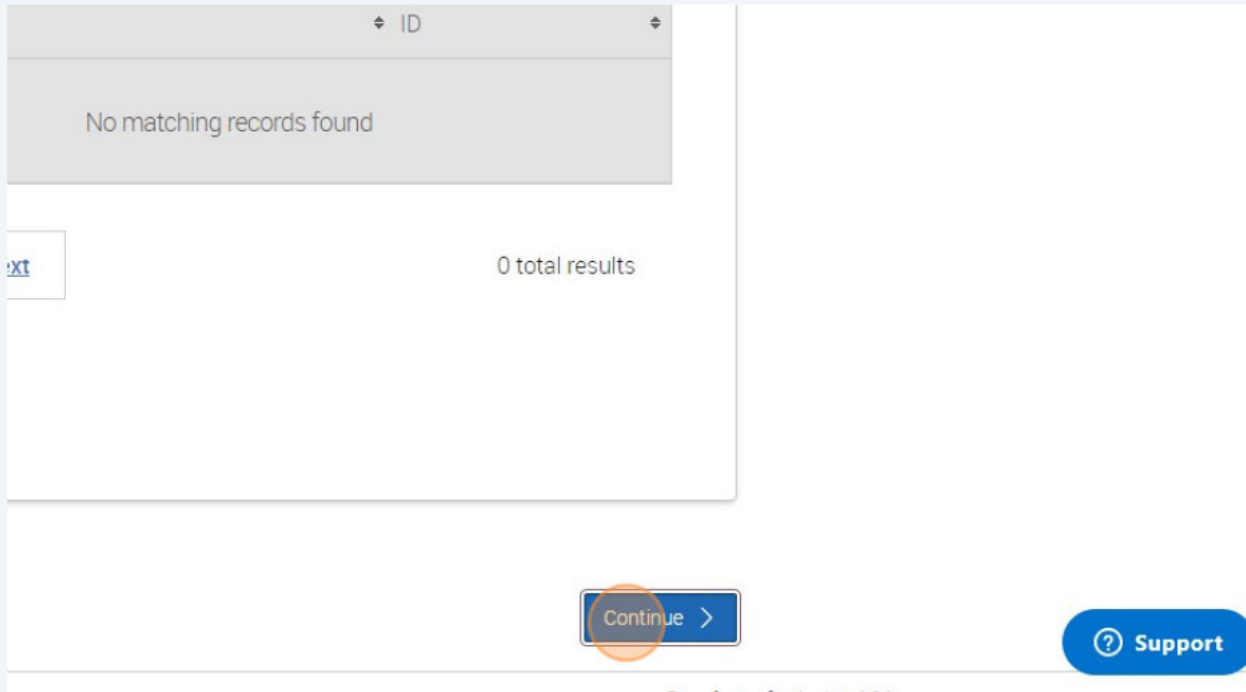


16 Click "Search"



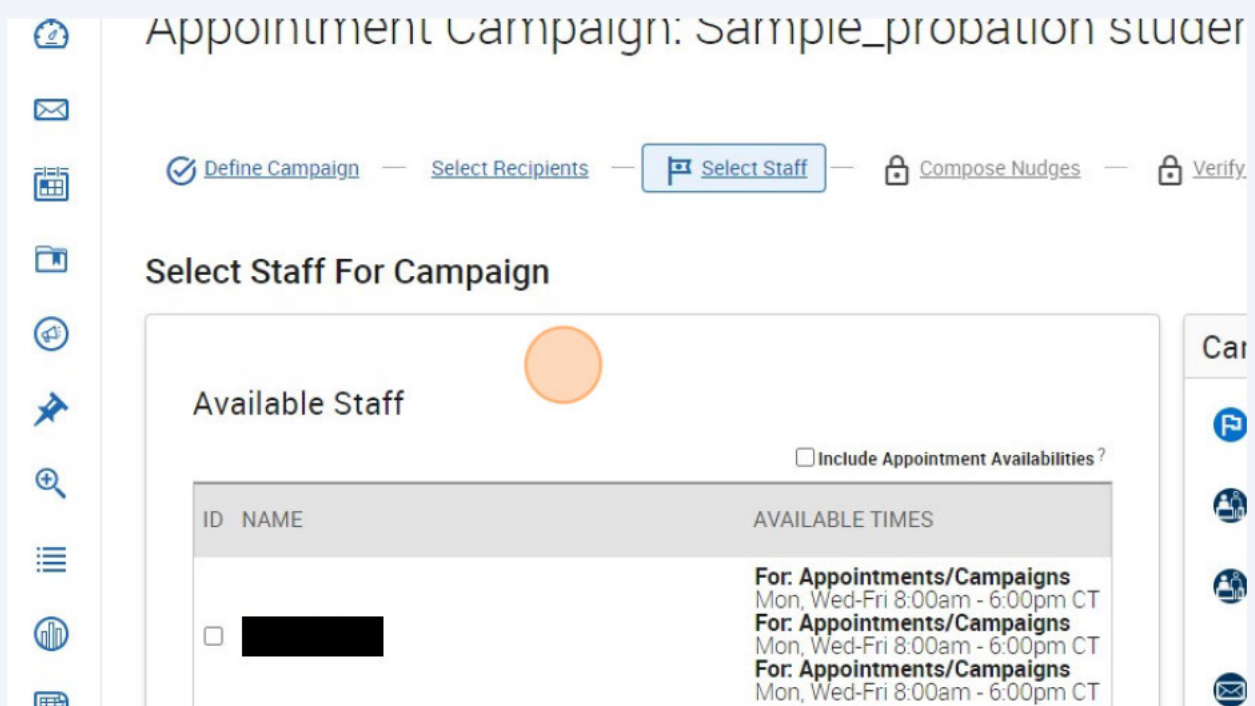
17

Since I do not have any assigned students, I did not generate any results. 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 you have added students. If these are correct, click **Continue**.



18

Next, you need to choose Organizers for the campaign. You must select yourself.



19 Click "Continue"

Mon-Wed, Fri 9:00am - 5:00pm C I

For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT

For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT

For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT

For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT

Save and Exit **Continue >**

[al Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#) | Page last refreshed at 4:24pm
Reserved. Release Version: 24.5.2 All times listed are in Central Time (US & Canada)

Support

20 Click "Add Welcome Message"

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Welcome Message


There are currently no nudges

21 Draft your welcome message

The screenshot shows an email draft interface. On the left is a sidebar with icons for undo, redo, search, list, charts, messages, and settings. The main area is divided into two columns. The left column contains the email editor:

- Subject ***: A text box containing the placeholder text `{Sstudent_first_name}, Schedule an Advising appointment`.
- Message ***: A rich text editor with a toolbar showing bold (B), italic (I), bulleted list, numbered list, link, and heading 2. Below the toolbar is a preview window showing the rendered email content:
 - Please Schedule Your Advising Appointment.** (with an orange circle next to the period)
 - Hello {Sstudent_first_name}:**
 - Text: "Please schedule an appointment for Choose Classes for Next Semester at Business Advising. 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."
 - Footer: "POWERED BY CKEditor"
- Available Merge Tags ⓘ**: A section for selecting merge tags.


The right column shows a preview of the final email:

- Andrew, Schedule appointment**
- 
- Please Schedule Your Appointment.**
- Hello Andrew:**
- Text: "Please schedule an appointment for Choose Classes for Next Semester at Business Advising. 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."
- [Schedule an Appointment](#)
- Text: "You can also copy and paste the following link into your browser. <https://uhcl.campus.eab.c>

22 Click "Save Welcome Message"

The screenshot shows a dialog box for saving a welcome message. The left panel contains the following information:

- Add Attachment:** A section with a "Choose File" button and the text "No file chosen".
- Welcome Message Date:** A date field showing "06/27/2024".
- Nudge Dates:** A section with two sub-items:
 - * Specific Dates: N/A
 - * Relative intervals after added to campaign: N/A

The right panel features the  **Navigate360** logo.

At the bottom of the dialog, there are two buttons: "Cancel" and "Save Welcome Message >". The "Save Welcome Message >" button is highlighted with an orange circle.

23 Set your "Success Message (Optional)"

Email Subject: {\$student_first_name}, Schedule an Advising appointment

Email Message: Please schedule your Advising appoi...

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

+ Add Success Message

No success message specified for this campaign.

24 Click "Continue"

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

No success message specified for this campaign.

Save and Exit Continue >

[Legal Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#) | Page last refreshed at 4:25pm
All rights Reserved. Release Version: 24.5.2 All times listed are in Central Time (US & Canada) [Support](#)

25 Review "Campaign Summary"

UNIVERSITY OF HOUSTON-CLEAR LAKE

Navigate360 | STUDENT SUCCESS



Verify & Start

Campaign Summary

Define Campaign

Name:	Sample_probation students
Care Unit:	Advising
Location:	Business Advising
Service:	Choose Classes for Next Semester
Appointment Limit:	1
Appointment Length:	30 mins
Slots Per Time:	1
Scheduling Window:	06/27/2024 - 08/29/2024
Allow Scheduling Over:	No

26 Select "Start Campaign"

View 0 recipients

View 1 staff

Send Date: Day added
Subject: {Sstudent_first_name}, Schedule an Advising appointment
Email Preview: [View Email](#)

Save and Exit

[Start Campaign](#)

[Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#)
Reserved. Release Version: 24.5.2

Page last refreshed at 4:25pm
All times listed are in Central Time (US & Canada)

[Support](#)