



CREATING AN APPOINTMENT CAMPAIGN - XU EAB NAVIGATE TRAINING

NAVIGATE AND YOUR ROLE

This training will help you learn how to:

- Log in to Navigate
- Set up your availability
- Launch an appointment campaign

PURPOSE OF APPOINTMENT CAMPAIGNS

Appointment campaigns allow you to easily track who has or has not scheduled an appointment.

Appointment campaigns also provide an opportunity to schedule reminders (nudges) to students that have not yet signed up for an appointment

If you have a small amount of students, you may want to send them a message in Navigate rather than set up a campaign.

LOGGING IN TO NAVIGATE

1. Navigate to <https://xavier.campus.eab.com/home> or select Navigate from the list of options on the Employee Hub
2. Enter your Xavier username and password

SETTING UP YOUR AVAILABILITY

You will need to set up your availability before you set up your campaign. This allows you to have more control over your appointments.

From your home screen in Navigate, click on the “My Availability” tab

Staff Home

Students Appointments My Availability

Assigned Students

List Type: Assigned Students Term: Fall Semester 2023 (De... Relationship Type: All Relationship Types

NAME	ID	STUDENT LIST	CUMULATIVE GPA	PREDICTED SUPPORT LEVEL	CATEGORY
No matching records found					

Actions

I want to...

[Issue an Alert/Kudos](#)

Quick Links

Take me to...

[School Information](#)

Campaigns...


[Appointment Campaigns](#)

Click on the arrow next to "Actions"

Staff Home

Students | Appointments | My Availability

Available Times

Actions ▾ 

<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE
No available times have been listed. To add a time, click the "Add Time" button.								

** All times listed are in Eastern Time (US & Canada)*


Click on "Add Time"

Staff Home

Students | Appointments | My Availability

Available Times

Actions ▲

- Add Time 
- Copy Time
- Delete Time

<input type="checkbox"/>	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE
No available times have been listed. To add a time, click the "Add Time" button.							

** All times listed are in Eastern Time (US & Canada)*

You will then see this box:

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 8:00am To 5:00pm

All times listed are in Eastern Time (US & Canada).

How long is this availability active?

Please select a duration

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

Please select Meeting Types

Care Unit

Please select a care unit

Location

Please select a location

Cancel Save

Now it's time to start adding your personal availability. For this training purpose, we are going to set up availability for an academic advising campaign.

- You can sync your availability with your Outlook calendar
- When students make an appointment, it will show up on your Outlook calendar

WHEN ARE YOU AVAILABLE TO MEET?

Start by selecting the day(s) you are available. *(If you have the same availability for multiple days, you can select all those days at the same time.)*

FROM AND TO

List the time (From and To) you will be available.

HOW LONG IS THIS AVAILABILITY ACTIVE?

Select the date range of your appointment campaign.

ADD TO YOUR PERSONAL AVAILABILITY LINK?

If you want to include an availability link in your email signature and you want any student to be able to use the link to make an appointment during the availability you are creating, you would want to select this. For the purpose of this training, we will leave this box unchecked to indicate we only want the recipients of this campaign to be able to utilize this time.

WHAT TYPE OF AVAILABILITY IS THIS?

How do you want to use this time? For this training, we will select *Campaigns*.

MEETING TYPE

Do you want to meet in person or virtual? You can add both options if you prefer.

CARE UNIT

Use the drop down to select your care unit. For this training, we will select *Academic Advising*.

LOCATION

Where will you be located for these appointments? (You must select a care unit before the options in this drop down will appear.) For this training, we will select *Student Success Center*.

SERVICES

Options in this box will be based on your previous selections. For this training, we will select *Advising*.

URL/PHONE NUMBER

If you are providing a virtual option, you can add your phone number or video link here.

SPECIAL INSTRUCTIONS FOR STUDENT

Use this space to share any special instructions you want the student to know. Do they need to bring anything with them? Do you want to provide directions to your office location?

WILL YOU BE MEETING WITH MULTIPLE STUDENTS?

If you plan to meet with multiple students at the same time (i.e. group advising), you will want to select a maximum number. For this training, we will select *1*.

You can now save your availability and go back and repeat the process if you have different availability for different days.

ADD AVAILABILITY✕

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From To
All times listed are in Eastern Time (US & Canada).

How long is this availability active?

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

Care Unit

Location

Cancel Save

LAUNCHING YOUR APPOINTMENT CAMPAIGN

Let's get ready to set up your campaign. From the home screen, click on the "Campaigns" icon in the left navigation panel.

The screenshot shows the Staff Home dashboard. On the left is a vertical navigation panel with icons for Home, Dashboard, Mail, Calendar, Campaigns (highlighted with an orange arrow), and other functions. The main content area is titled "Staff Home" and includes tabs for "Students", "Appointments", and "My Availability". Below the tabs is a section for "Assigned Students" with filters for "Type" (Assigned Students), "Term" (Fall Semester 2023 (De...)), and "Relationship Type" (All Relationship Types). A table with columns for NAME, ID, STUDENT LIST, CUMULATIVE GPA, PREDICTED SUPPORT LEVEL, and CATEGORY is shown, but it contains no data. On the right side, there are "Actions" and "Quick Links" panels. The "Actions" panel includes a link for "Issue an Alert/Kudos". The "Quick Links" panel includes links for "School Information" and "Campaigns...". The Xavier University logo is visible in the top right corner.

Click on “+ Add New” under “Appointment Campaigns”

XAVIER UNIVERSITY

NAVIGATE

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New](#)

Messaging Campaigns

Email or text a group of students on specified dates about certain things they may need to do or attend.

[+ Add New](#)

Enrollment Campaigns

Allows staff to reach out to specific student populations and encourage them to enroll for a specific term. Enrollment Campaigns are best deployed by staff members seeking to encourage students to enroll in an upcoming term.

[+ Add New](#)



New Appointment Campaign



[Define Campaign](#) — [Select Recipients](#) — [Select Staff](#) — [Compose Nudges](#) — [Verify and Start](#)

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

Appointment Limit: * x

Timeline

- Objective**
Pending Setup...
- Recipients**
Pending Setup...
- Staff**
Pending Setup...
- Welcome Message**
Pending Setup...
- Campaign Ends**
Pending Setup...

CAMPAIGN NAME

What would you like to add your campaign? It can be helpful to include something in the name to indicate the term/year. For this training, we will call the campaign *F23 Advising Appointments*

INSTRUCTIONS FOR LANDING PAGE

Do you want students to see any additional information on the landing page? For this training, we will live this option blank.

CARE UNIT/LOCATION/SERVICE

This information should match what you entered in your availability for this campaign.

Appointment Configurations

Appointment Limit: * 1 x v

Appointment Length: * 30 min x v

Slots Per Time: * 1 x v

Allow Scheduling Over Courses

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 * September 19, 2023 v

End Date * October 3, 2023 v

Cancel Save and Exit Continue >

APPOINTMENT LIMIT

How many appointments would you like to allow an individual student to make? It can be helpful to select a number higher than 1 in case a student cancels their appointment and would like to make a new appointment.

APPOINTMENT LENGTH

How long would you like each appointment to be?

SLOTS PER TIME

If you are meeting individually with students, you would select 1. If you are meeting with a group, you would adjust this number to reflect that.

ALLOW SCHEDULING OVER COURSES

This box should be left unchecked.

STAFF REMINDERS/RECIPIENT REMINDERS

How would you like to receive reminders and how would you like your students to receive appointment reminders? This defaults to email.

START DATE/END DATE

Provide the date range for your campaign and then select "Continue."

ADDING STUDENTS TO YOUR APPOINTMENT CAMPAIGN WITH BID/EMAIL/NAME

Now it's time to add students to your campaign. There are multiple ways to do this.

If you have a list of students, you can copy and paste that information into the search box. For example, if you are using a list of ID numbers from a spreadsheet, you can copy and paste them all at once into the search box.


It can also be helpful to filter by selecting the current enrollment term.

Define Campaign — Select Recipients — Select Staff — Compose Nudges — Verify and Start

Add Recipients To Campaign

New 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 ▾

Timeline




- Objective: Schedule Appointment(s)
By Fri 10/20/2023
- Recipients
Pending Setup...
- Staff
Pending Setup...
- Welcome Message
Pending Setup...
- Campaign Ends
Fri 10/20/2023

ADDING STUDENTS TO YOUR APPOINTMENT CAMPAIGN WITH FILTERS

If you don't want to add your students to your campaign from a list, you may be able to use filters. If students are assigned to you in Banner/Navigate, that can be a great way to add them to your campaign.

You can select your own name as the assigned staff member and search.

It can also be helpful to filter by selecting the current enrollment term and selecting "My Students Only"

IGATE   

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 ▾

Success Indicators Predicted Support L ▾

Timeline

- Pending Setup...
- Staff
Pending Setup...
- Welcome Message
Pending Setup...
- Campaign Ends
Fri 10/20/2023

You can also find students in a variety of other ways. For example, you may want to find students from a particular major.

IGATE

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

Success Indicators Predicted Support Level

Search Include Inactive My Students Only

Pending Setup...
Staff
Pending Setup...
Welcome Message
Pending Setup...
Campaign Ends
Fri 10/20/2023

You should now see a list of students. Now is a great time to spot-check your list to ensure you used the right filters or search functions. Once you have the students you want to add to your campaign, you will select them here.

If your list is multiple pages long, you can select “Name” and then “Select all # items” to add all students.

Hit “Continue.”

Add Recipients To Campaign

Review Recipients in Campaign

Actions ▾

100 items on this page are selected. [Select all 210 items.](#)

<input checked="" type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	Adelman, Emma
<input checked="" type="checkbox"/>	Adkins, Lizzie
<input checked="" type="checkbox"/>	Aisthorpe, Jack
<input checked="" type="checkbox"/>	Alameen, Zayd
<input checked="" type="checkbox"/>	Allen, Alisha
<input checked="" type="checkbox"/>	Anez, Luciano
<input checked="" type="checkbox"/>	Artikova, Jasmine
<input checked="" type="checkbox"/>	Augustine, Owen
<input checked="" type="checkbox"/>	Bair, Wyatt

Showing items 1-100 of 210

← previous 1 2 3 next →

Timeline

- Objective: Schedule Appointment(s)
By Fri 10/20/2023
- Recipients
210
- Staff
Pending Setup...
- Welcome Message
Pending Setup...
- Campaign Ends
Fri 10/20/2023

ADDING STAFF TO YOUR APPOINTMENT CAMPAIGN WITH FILTERS

On the next screen, you should see the availability you entered earlier. Select your name and your availability for this specific campaign then select “Continue.”

CREATING COMMUNICATIONS FOR YOUR APPOINTMENT CAMPAIGN

Now you are ready to create your communications to the student. Select “Add Welcome Message” and draft the email you want students to see.

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.

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](#)

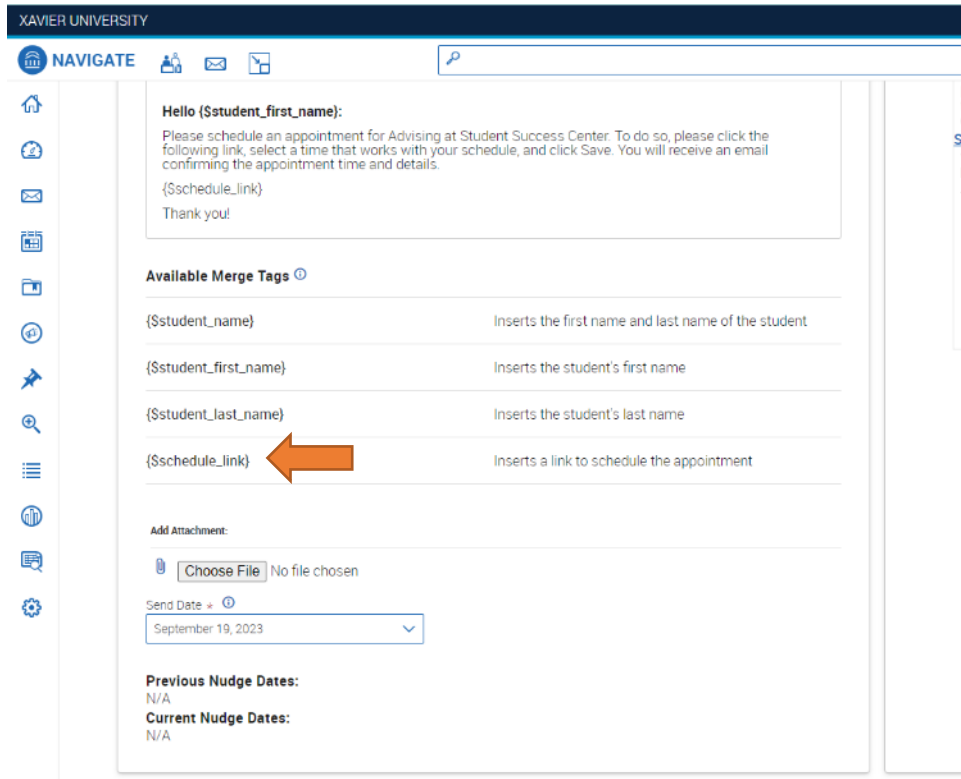
No success message specified for this campaign.

Timeline

- Objective: Schedule Appointment(s)
By Fri 10/20/2023
- Recipients
210
- Staff
1
- Welcome Message
Pending Setup...
- Campaign Ends
Fri 10/20/2023

< Back Save and Exit Continue >

You will enter your subject line and then add your text to the message box. You can copy and paste merge fields to personalize your communication. Be sure to copy and paste your schedule link to the body of the message! Select your Send Date and then save your message.



XAVIER UNIVERSITY

NAVIGATE

Hello (**{Student_first_name}**):

Please schedule an appointment for Advising at Student Success Center. 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_link}

Thank you!

Available Merge Tags

{Student_name}	Inserts the first name and last name of the student
{Student_first_name}	Inserts the student's first name
{Student_last_name}	Inserts the student's last name
{Schedule_link}	Inserts a link to schedule the appointment

Add Attachment:

No file chosen

Send Date *

Previous Nudge Dates:
N/A

Current Nudge Dates:
N/A

NUDGE

You may choose to add a nudge to your campaign. This will send a reminder email to students that have not scheduled an appointment by a certain date.

SUCCESS MESSAGE

If you want to set up a message to send to students after they have completed their appointment, you can use the success message option to do so.

After you are finished creating messages, you will click "Continue."

You will then verify your campaign information on the next page and start your campaign.



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 Nudge

Send Date: 09/19/2023



Email Subject: (\$student_first_name), Schedule an Academic Advising appointment

Email Message: Please schedule your Academic Advis...

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.

< Back

Save and Exit

Continue >

Questions? When in doubt, email eab@xavier.edu