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# Launching a Campaign



Help Center Manager 20 days ago · Updated

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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.

Quick Links
Take me to
Schedule General Event
Record Class Attendance
Manage Assignments
School Information
Download Center for Reports
Campaigns
Appointment Campaigns
Travel Letters
Book Slip Campaign

# **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.

New Invitation C	ampaign				
Define Campaign	te visible on the Appointment Campaigns Ta	ds and the Ourlant Droffie for use	er also have correlation to view it		
Campaign Name:	e noure un sie appointment camplegro te		Begin Date:	End Date:	
	8		07/24/2018	06/07/2018	
Care Unit:			Appointment Limit:		
Choose			1		
Location:			Appointment Length:		
	*		5-min		•
Service:			Sixts Per Time:		
			1		•
Cancel			Save and	Exit Con	tinue

- **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 1<sup>st</sup> 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.

# 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 Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.

Add Students To Campaign					
Advanced Search					v
Saved Searches +					
Keywords (First Name, Lest Name, E-mail, Student (0)					
Student Information First Name	: , Last Name, Student ID, Category, Tag, Gender,	Race, Watch List			
First Name <sup>7</sup>	Last Name <sup>7</sup>	From Last Name <sup>7</sup>	To Last Name?	Student 10 <sup>7</sup>	
Gender	Race	Watch List (in Any of Th	vesie)	Transfer Student	
Al *	Al *	Al			
Category (In Any of these)?					
AI 0					
Tag (In Any of these) <sup>2</sup>					
AI 0					
Enrollment History Enrolment To	press.				*
Area of Study College/School, Degr	ee, Concentration, Major				*
Performance Data GPA, Hours, C	redits				*
Term Data Classification, Section Tag	, Term GPA				*
Course Data Course, Status					*
Assigned To Advisor, Tutor, Coach					*
Success Indicators Concern, Succ	ess Markers				*
Search Orly Students Only	Include Inactive				
< Back					Continue >

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.

id	Advisors To Campaign	Include Appointment Availabilities
	NAME	AVAILABLE TIMES
	Emily Sentz	Tue, Thu 3:00pm-5:00pm
	Maanie Hamzaee	Mon-Fri 8:00am-5:00pm
	LaToya White	Mon-Fri 8:00am-5:00pm
	Matthew Mustard	Tue. Thuild@am_fc@pm
	Matthew Mustard	Tue, Thu 8:00am 5:00pm
	Gina Schorr	Mon-Fri 12:45pm-5:00pm
	Kirsten Smith	Tue-Thu 1:00pm 5:00pm
	Ashlee Demastus	Mon-Wed, Fri 8:00am-6:00pm
	Ashley Liberio	Mon-Fri 8:00am-5:00pm
	Rachel Wolfowitz	Mon-Fri 8:00am-12:00pm
	Thomas Sellers	Mon-Fri 8:00am-5:00pm
	Christine Duchouquette	Tue, Thu 1:00pm-5:00pm (Fall Semester 2017) Mon-Tue, Thu-Fri 10:30am-12:00pm (Fall Semester 2017)

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.

Get a Final Check Up			
Compose Your Message			
(\$student_first_name), Get a Final Check Up			
B I   □ □ = □   4. ∧   Nml →			
Are You Ready for Finals? Get a Check Up Hele (Betudent, Sirst, name): Your advice requests that you schedule an appointment. To do confirming the appointment time and details. (Bechedule_Sirs)		s with your schedule, and click Bave. You will	Inoceive an email
body p			×
Merge Tags: 7 (Sstudent_first_name) inserts the student's first name	(Sstudent_last_name) inserts the student's last name	(Sschedule_link) Inserts a link to schedule the appointe	nent
Instructions or Notes for Landing Page			
Preview Email Preview Landing Page			
Andrew, Get A Final Check Up			
Are You Ready For Finals? Get A Check Up! Hells Andrew: Your advisor requests that you schedule an appointment, that works with your schedule, and click Save. You will rec details. Schedule an Appeintment You can also copy and paste this address into your web br https://helburyt.campoor training?ass.com/sr12365	ive an email confirming the appointment time and		
Thank you!		ł	
< Back		Save and Exit	Continue

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.

î ≥	Fall Semester 2017 Campaigns	💼 EAB
曲	Progress Report Campaigns Enrollment Censules: Appointment Campaigns Book Silp Campaign Travel Letters	Actions
	(unsent) Kirsten's Class 2 of 5 steps complete. This evaluation campaign was incomplete and has not been sent. Cick on the campaign's title to continue editing and send the campaign.	Fwant to create a new Progress Report Campaign
~	rq         Seric 11.05/2017   Quick States           Seric 11.05/2017   Quick States         Image: Comparison of Com	Enrollment Cansus Campaign
A	Fail 2017 - Biology 🚯 Response (19%) 🌖 Response (19%)	Appointment Campaign
	EmilyTest Serie. 16/21/2017   Quild Stats	Book Silp Campeign
	AlertTEST 🕘 Response (37%) 🔮 Au-Rok (100%)	Travel Letter
Q	Alert reason test Sere: 1907/2017   Qurix Suns	Progress Reports
8	(Unsent) new     3 of 5 steps complete. This evaluation campaign was incomplete and has not been	All Progress Reports
1	sent, Click on the campaign's title to continue editing and send the campaign. Test See: 10/30/2017   Quirk Stells Ad-Risk (21%)	Detail Progress Reports
т <u>ж</u>	(unsent) Athlete Campaign 3 of 5 steps complete. This evaluation campaign was incomplete and has not been see, click on the campaign's tible to continue editing and send the campaign.	At-Risk Progress Reports Detail At-Risk Progress Reports
0	. Test (h anno 100 de anno 100	

# 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.

=	Progress Reports	Create New
î	Step 1 : Name & Message	Name of Campaign Progress Report for Fall
2	Name your Progress Report Campaign, and provide a message for professors.	Email Subject
İ	Step 2 : Choose Students	Fall Progress Report Campaign
	Choose all-students, subset of students, or classes that are to be monitored.	Email Message
₩ 🖈 🖸 🔍 ጵ	Step 3 : Define Behavior Define how your Progress Report will behave with thank you notes and expiration dates. Step 4 : Confirm Confirm the students enrollments which are the target of the Progress Report campaign.	Dear Professor. Please take a few minutes to fill out progress reports for the students in your class. The feedback you give us will be used to help identify those students who may be in need of extra help. Your help is very much appreciated. Regards. Provost Joe Smith
	Step 5 : Send & Complete Your Progress Report Campaign has been sent to instructors.	
Ċ.		Save and Next : Choose Students

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.

How would you like to select which students receive progress reports? The following 3 selection methods offer the power to drill down into a particular student/class or scale to the entire campus:

O All Students Active for Academic Term : Send requests for all students active for the Spring 2014 term. This includes all students who are active in their courses (i.e. not dropped). This will include everyone in your GradesFirst environment, and is not restricted by any requirement other than academic term.

Select Specific Students and Courses (< 2000 students): Send requests for specific students filterable by any condition within GradesFirst. You can also choose to send to specific course sections. By choosing both a list of students and a list of courses, you can select specific students in a specific course.

Select Cohorts of Students and Courses (> 2000 students): Send requests to cohorts of students filterable by any condition. Differs from the "Specific Students" above since you will not choose specific students or specific courses. In the "Confirm" stage, you will see a sample of students and courses you chose.

#### **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.

Filter Studer	its		
Simple Search	Bwitch To Advanced Bearch		
Keywords			
Search	My Students Only	Az-Risk Students Only	Include inactive
Search Results		Send Requests for These S	Rudenta
Nare Nare	Classification	Name	Classification
Add Student(s)		Remove Student(x)	

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.

Filter Course Sections		
Section Search		
Course/Section Keyword Search	Filter by Professor	Filter by Section Tag
	Al *	AL
Search Only show courses for the above selected students		

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.

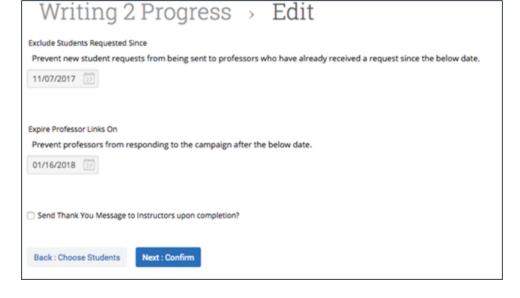
### Select Cohorts of Students and Courses (>2000 students)

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.

Filter Students				
Simple Search Switch To Advanced Search				Saved Searches +
Keywords				
My Students Only    AniRisk Students Only    Include Inactive				
Filter Course Sections				
Filter Course Sections				
Section Search		-		
	Filter by Professor		Filter by Section Tag	
Section Search	Fiter by Professor All	•	Filter by Section Tag	
Section Search		•		
Section Search CourseSection Keyword Search		•		
Section Search CourseSection Keyword Search		•		
Section Search CourseSection Keyword Search		•		
Section Search CourseSection Keyword Search	Al	•		

# **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.

Progress Reports	> Wr	riting 2 I	Progres	s > Edit			
Step 1 : Name & Message				on will send 1 evaluation req review this list to ensure all o		ts in 1 sections to 1 professors. Bei nd courses are included.	ow is a list of all
Name your Progress Report Campaign, and provide a message for professors.							
	Evalu	ation Requ	iests To Be	e Sent			
Step 2 : Choose Students	INDEX	STUDENT	ID.	PROFESSOR	COURSE	COURSE NAME	SECTION
Choose all-students, subset of students, or classes that are to be monitored.	1	Hirsi Kusuma	076983830	Ashlee Demastus	ANTH-1102	INTRO TO ANTHROPOLOGY	009
Step 3 : Define Behavior							
Define how your Progress Report will behave with thank you notes and expiration dates.	You <b>ha</b>	we not selected to se	end a follow up thank	you E-mail to professors.			
espiration oates.							
Step 4 : Confirm	Back : Def	ine Behavior Next	Send & Complete				
Confirm the students enrollments which are the target of the Progress Report campaign.							

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.

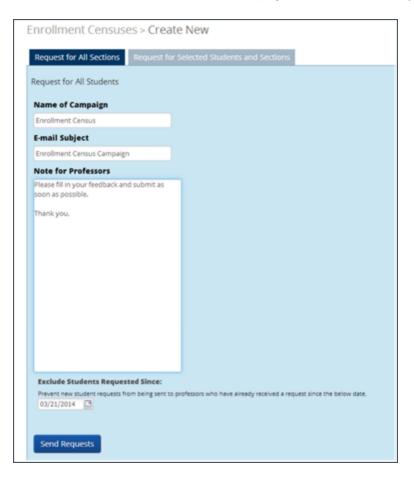
Enrollment censuses are often run during the early weeks of the term to check that students are meeting SAP requirements to continue being eligible for their financial aid. In addition, institutions may be ensuring that students are going to class in those early weeks where they could catch a student 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.

Simple Search       Switch To Advanced Search         Keywords	
Search My Students Only At-Risk Students Only Include Inactive	
Search My Students Only At-Risk Students Only Include Inactive	
Search	
Search	
Search	
Search	
d av Barnava Eta ante	
dd or Remove Statients	
earch Results Send Requests for These Students	
V Name A Classification Name A Classificat	m
📝 1 Abercrombie, Jerald Freshman 📩 🛅 1 Abercrombie, Jerald Freshman	
🛛 2 Abernathy, Norell Sophomore 📃 2 Abernathy, Norell Sophomore	
🛛 3 Adams, Brittany Sophomore 📃 3 Adams, Brittany Sophomore	
🗹 4 Adams, Julian Freshman 📄 4 Adams, Julian Freshman	
🛛 5 Akhimien, Anne 🛛 Freshman 🔄 5 Akhimien, Anne Freshman	
📝 6 Alarape, Rahman Freshman 🔄 6 Alarape, Rahman Freshman	
7 Allen-Wright, Deonta Freshman 7 Allen-Wright, Deonta Freshman	

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.

Keywords					Filter by Professor		Filter by Section Tag	
	·							
-								
Search For	Selected Students Only							
d or Remove Sect	0.04							
	Unis		_					
arch Results		Send	Send Requests for These Sections					
Name .	Professor			Name .	Professor			
1 ACCT225-6 8	TRO TO FIN Charlie Sox, DJ M		1	ACCT225-6 NTRO TO FIN	Charlie Sox, D	U Mr. *		
2 ACCT324-30	SURVEY O Charle Sox		2	ACCT324-5 SURVEY OF	Charlie Sox			
3 ACCT324-5 5	URVEY OF Charle Sex		3	ACCT502-2 ADV COSTM	Charlie Sox			
4 ACCT405-1 P	NANCIAL A Charle Sex		4	ARAB201-1 INTERNEDIAT	Charlie Sox, R	latie 🛛		
5 ACCT502-2 A	OV COSTM Charle Sox		5	ASTR111-13 DESCRIPTIV	Charlie Sox			
6 ACCT502L-1	ADV COST/ Charle Sox		6	ASTR111A-1 DESCRIPTIV	Charlie Sox			
7 ARA8201-1	NTERNEDIAT Charle Sox, Rolle		7	BIOL101-2 BIOLOGICAL P	Charlie Sox			
8 ASTR111-12	DESCRIPTIV Charlie Sox, DJ III		8	BIOL302-501 CELL & MOL	Charlie Sox			
9 ASTR111-13	DESCRIPTIV Charle Sox		9	BIOL302L-2 CELL&MOLEC	Charlie Sox			
	DESCRIPTIV Charle Sox	1 1	10	CRU041-1 SOCIOLOGY	Charle Sox	*		
10 ASTR111A-1								

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**.

# **Related Articles**

- Strategic Care Campaigns: Appointment Campaigns
- Appointment Campaign Administration
- Strategic Care Campaigns: Progress Report Campaigns
- Guide to Alerts, Cases, and Progress Reports
- Progress Report Administration
- Managing a Campaign
- Responding to a Campaign
- Strategic Care Campaigns: Enrollment Census
- Enrollment Census Administration
- Targeted Advising Campaigns Toolkit
- Campaign Ideas
- Campaign Tracker

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