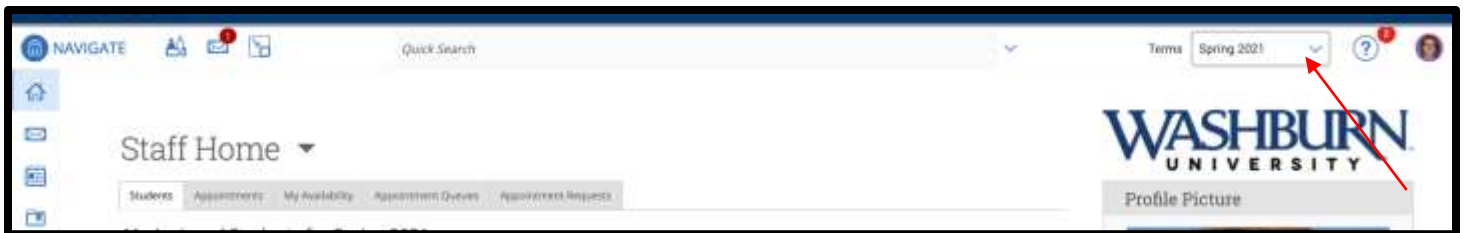


Navigate: How to Run an Advising Appointment Campaign

1. Appointment Campaigns allow you to invite a group of students to schedule an appointment with you for a specific reason. While there are many reasons you might conduct an Appointment Campaign, most faculty and staff use this feature for advising. Once you have logged in to Navigate, and adjusted your term in the upper right-hand corner,



Make sure that your Navigate Calendar is synced to your electronic calendar (for instructions on how to synch your calendar, [Click Here](#)) and make sure that your appointment availability is set up for **Campaigns** (for instructions on how to set up your availability, [Click Here](#))



Available Times							
Actions ▼							
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	9:00a-4:00p	Forever	Biology Department	Academic or Career Advising For: Campaigns	College of Arts & Sciences	Edit

2. Click on the **Campaigns** icon on the left-hand side blue bar



3. Now, click on the **Appointment Campaigns** button, located in the **Actions** box, below the Washburn University logo



4. A form will appear on your screen, fill out each box as instructed

The screenshot shows a 'Define Campaign' form with the following fields:

- Campaign Name: [Text Input]
- Care Unit: [Dropdown Menu]
- Location: [Dropdown Menu]
- Service: [Dropdown Menu]
- Begin Date: [Date Picker]
- End Date: [Date Picker]
- Appointment Limit: [Text Input]
- Appointment Length: [Dropdown Menu]
- Slots Per Time: [Text Input]

Buttons at the bottom: Cancel, Save and Exit, Continue.

- a. Your **Campaign Name** should be created using this naming convention: Last Name, First Initial_Campaign Name_Term Code (Term Codes contain the current year, followed by **10** for spring terms, **20** for summer terms, and **30** for fall terms) ex. Foreman, C_Fall Advising_202010

Campaign Name:
Foreman, C_Campaign Name_202010

- b. Your **Care Unit** refers to your academic college or school

Care Unit:
College of Arts & Sciences
Choose
College of Arts & Sciences
Mabee Library: Center for Student Success
Peer Educators
School of Applied Studies
School of Business
School of Nursing

c. Your **Location** refers to your academic department

The screenshot shows a dropdown menu for 'Location'. The current selection is 'Biology Department'. Below the dropdown, a search bar is visible. The list of options includes: 'Art Department: Virtual & Phone Appointments', 'Biology Department' (highlighted in blue), 'Biology Department: Virtual & Phone Appointments', 'Chemistry Department: Virtual & Phone Appointments', and 'College of Arts & Sciences Dean's Office - Morgan 209: Virtual & Phone Appointments'.

d. Your **Service** should be your purpose for the **Appointment Campaign**

The screenshot shows a dropdown menu for 'Service'. The current selection is 'Academic or Career A...'. Below the dropdown, a search bar is visible. The list of options includes: 'Academic or Career Advising' (highlighted in blue) and 'Class Support'.

e. Adjust your **Begin Date** and **End Date** to reflect how long you would like your campaign to be active (two weeks is the recommended time frame)

The screenshot shows a form for configuring an appointment campaign. It includes fields for 'Begin Date' (03/25/2020) and 'End Date' (04/08/2020). Below these are fields for 'Appointment Limit' (1), 'Appointment Length' (30 min), and 'Slots Per Time' (1). A calendar for April 2020 is displayed, with the date 04/08/2020 highlighted in blue.

April 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- f. Your **Appointment Limit** refers to how many times the student can schedule an appointment with during this campaign

The screenshot shows a dropdown menu titled "Appointment Limit:". The number "1" is selected and highlighted in blue. Other visible options include 2, 3, 4, 5, 6, and 7.

- g. Set your **Appointment Length** to the amount of time you would like scheduled for each appointment

The screenshot shows a dropdown menu titled "Appointment Length:". The option "30 min" is selected and highlighted in blue. Other visible options include 5 min, 10 min, 15 min, 20 min, 45 min, and 60 min.

- h. **Slots Per Time** should be set to **1**, unless you would like to have multiple students schedule for the same time slot

The screenshot shows an input field titled "Slots Per Time:" with the number "1" entered.

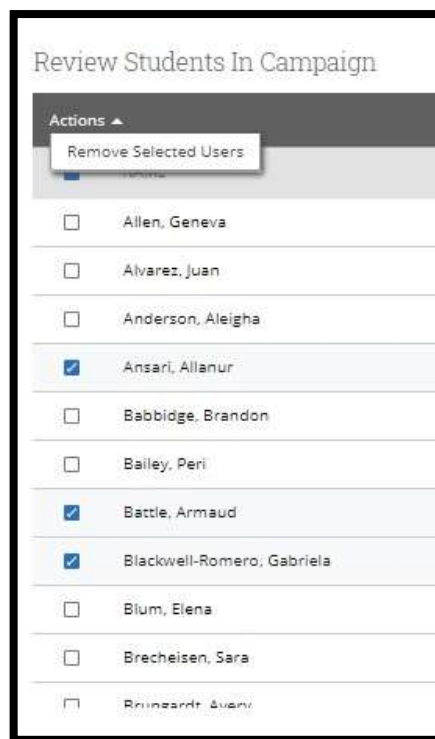
- i. Click the continue button on the lower right-hand side of the form

A blue rectangular button with the word "Continue" written in white text.

- j. The next screen will ask you to **Add Students To Campaign**, select **Invite All My Assigned Students** to invite all your advisees. If you would like to invite another list of students, select **Advanced Search** and choose your criteria.



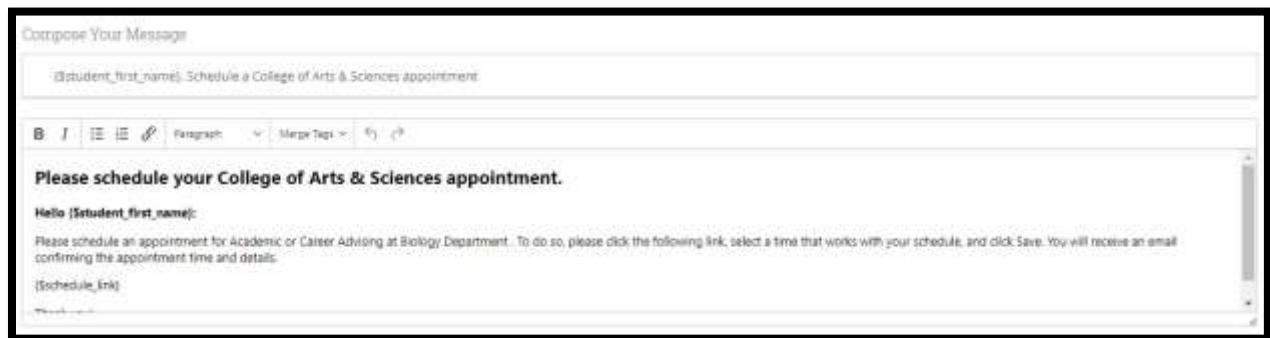
- k. **Review Students In Campaign**, if you have certain advisees you do not need to meet with, click the check box next to their name, then click the **Actions** button in the dark gray bar, and select **Remove Selected Users**



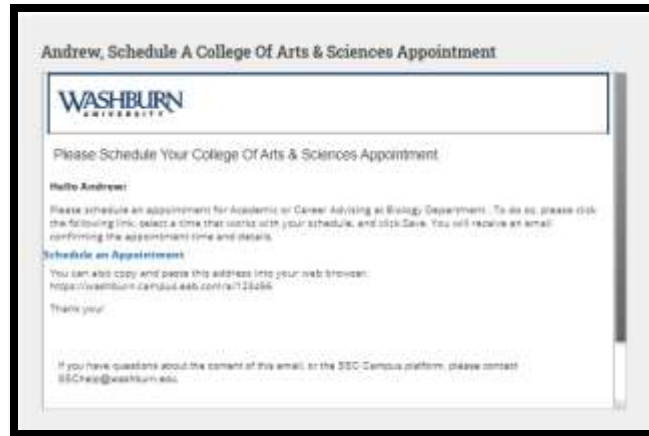
- l. On the **Add Organizers To Campaign** screen, select the check box next your name, and click **Continue**



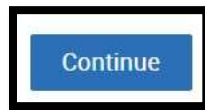
- m. The next screen prompts you to **Compose Your Message**, all text is customizable, but do not delete any text found in {brackets, as these will auto-populate the student’s first name as well as the link to schedule the appointment



- n. Scroll down below the **Compose Your Message** box to review your email



o. Click **Continue**



p. On the final screen, review the details of your campaign, and click **Send**



When a student has scheduled an appointment, you will receive an email notification, and the appointment will auto-populate onto your electronic calendar and theirs.