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,

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])

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

3. Now, under Appointment Campaigns button, click Appointment Campaigns and then Add New
4. A form will appear on your screen, fill out each box as instructed.

   a. You can use the **allow scheduling over courses** to allow students to schedule an appointment on advising day even if they have a class during that time.

   b. Your **Care Unit** refers to your office or school

   c. Your **Location** refers to your office or department

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

![Image showing service options]

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)

![Image showing date selection]

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

![Appointment Limit Image]

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

![Appointment Length Image]

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

![Slots Per Time Image]
i. Click the continue button on the lower right-hand side of the form

![Continue button]

j. The next screen will ask you to **Add Recipients To Campaign**, search for your list of students. If you would like to invite another list of students, select **Advanced Search** and choose your criteria.

![Add Recipients To Campaign]

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**

![Review Students In Campaign]
I. On the **Select Staff for Campaign** screen, select the check box next your name, and click **Continue**

![Select Staff for Campaign screenshot]

m. The next screen prompts you to **Compose Nudges**, select **Add Nudge**, then Compose Message

All text is customizable, but don't 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. You can add more than to send the message by adding more nudges.

![Compose Nudge screenshot]
n. Scroll down below the **Compose Your Message** box to review your email.

![Compose Your Message](image)

o. Click **Continue**

![Continue Button](image)

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

![Compose Nudges](image)

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.