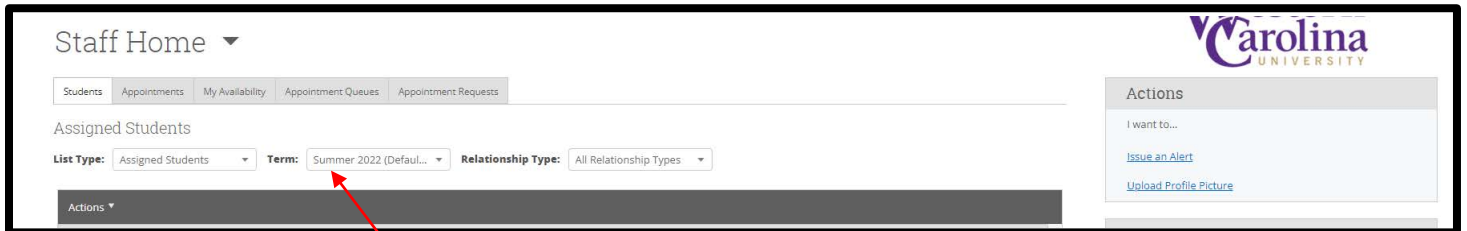


Navigate: How to Run an Advising Appointment Campaign

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](#))

What type of availability is this?

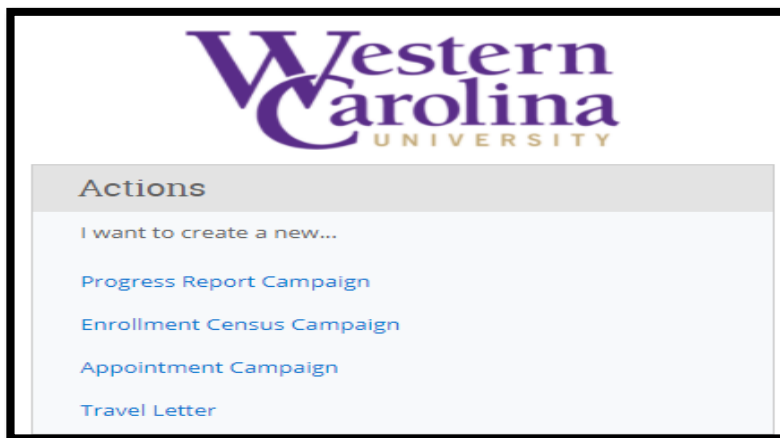
Appointments
 Drop-ins
 Campaigns

Available Times							
Actions ▼							
<input type="checkbox"/>	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK
<input type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	9:00am - 4:00pm	July 19, 2021 to August 02, 2021	Advising Center - Virtual Conferencing	Transfer Issues, 5th week grades, Change Major/Minor, Course Withdrawal, Initial Meeting, Orientation 2021 Professional Advisor Appointment, Registration For: Appointments/Campaigns	Advising	Yes 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 WCU 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 and options:

- Campaign Name:** Text input field.
- Care Unit:** Dropdown menu.
- Location:** Dropdown menu.
- Service:** Dropdown menu.
- Begin Date:** Date picker (05/20/2020).
- End Date:** Date picker (06/03/2020).
- Appointment Limit:** Dropdown menu (1).
- Appointment Length:** Dropdown menu (5 min).
- Slots Per Time:** Text input field (1).
- Allow scheduling over courses:** Checkbox (unchecked).

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

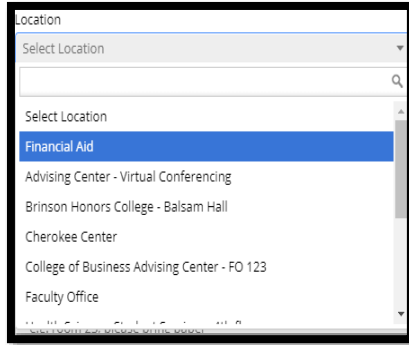
a. You can use the **allow scheduling over courses** to allow students to schedule an appointment on advising day even if they have a class during that time.

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

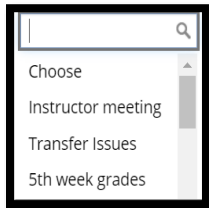
The screenshot shows the 'Care Unit' dropdown menu with the following options:

- Choose
- Advising
- Center for Career and Professional Development
- Educational Outreach
- General
- Mentoring and Persistence to Success (MAPS)
- Tutoring

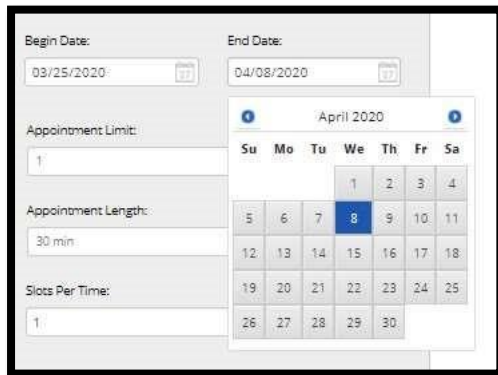
c. Your **Location** refers to your office or department



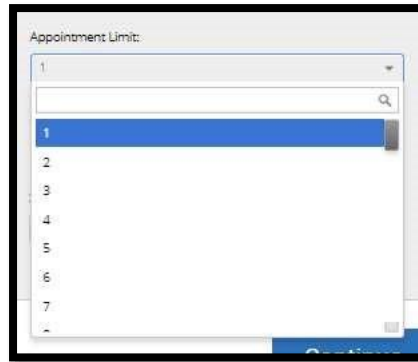
d. Your **Service** should be your purpose for the **Appointment Campaign**



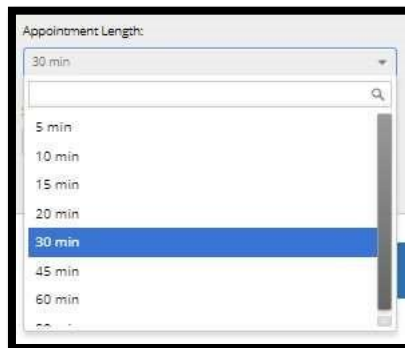
e. Adjust your **Begin Date** and **End Date** to reflect how long you would like your campaign to be active (two weeks is the recommended time frame)



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



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



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



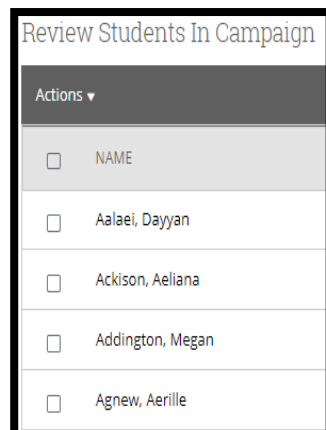
- i. Click the continue button on the lower right-hand side of the form



- 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**



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

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Steve Zwilling	For: Appointments/Campaigns Mon-Fri 9:00am - 4:00pm ET (July 19, 2021 - August 2, 2021)

- 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

Compose Your Message

{@student_first_name}, Schedule a College of Arts & Sciences appointment

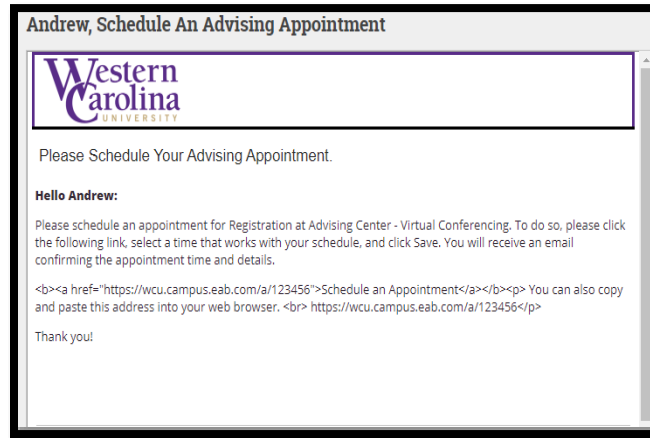
Please schedule your College of Arts & Sciences appointment.

Hello {@student_first_name}:

Please schedule an appointment for Academic or Career Advising at Biology Department. 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}

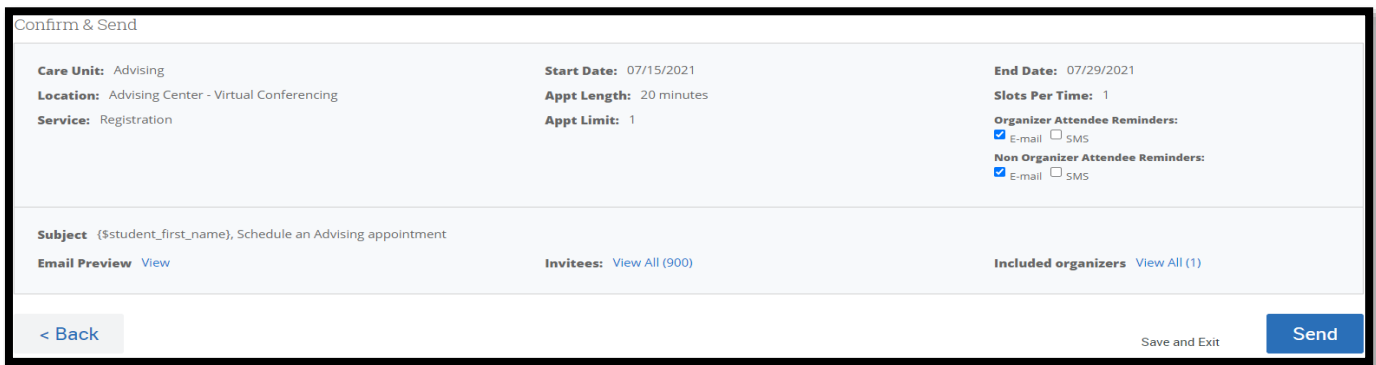
- n. Scroll down below the **Compose Your Message** box to review your email



- 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.