Creating an Event in Student Success

Intro: This workflow guide covers how to create and launch an Event for students. Events are Care Unit-specific. To gain access to create Events, users need the **Create, Edit, Delete Their Own Events** and the **View Events** permissions. This is not the same as a General Event.

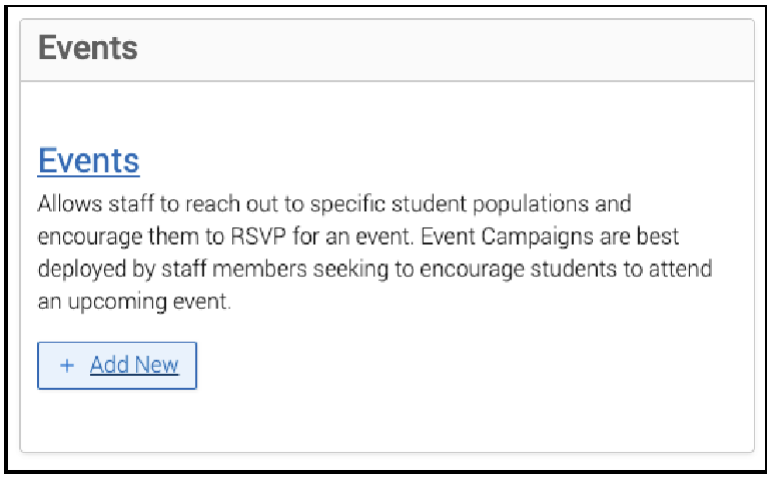
Events and Navigate360

Navigate360 for Student Success has added a feature that is very similar to campaign types, Events. Events allow staff to reach out to specific student populations to encourage them to sign up for events. Strategic questions should be asked when creating events, such as:

- How would you like to impact your students with events? What student populations do you envision this would be used for?
- Who should be creating events? Should events 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?

Launching an Event

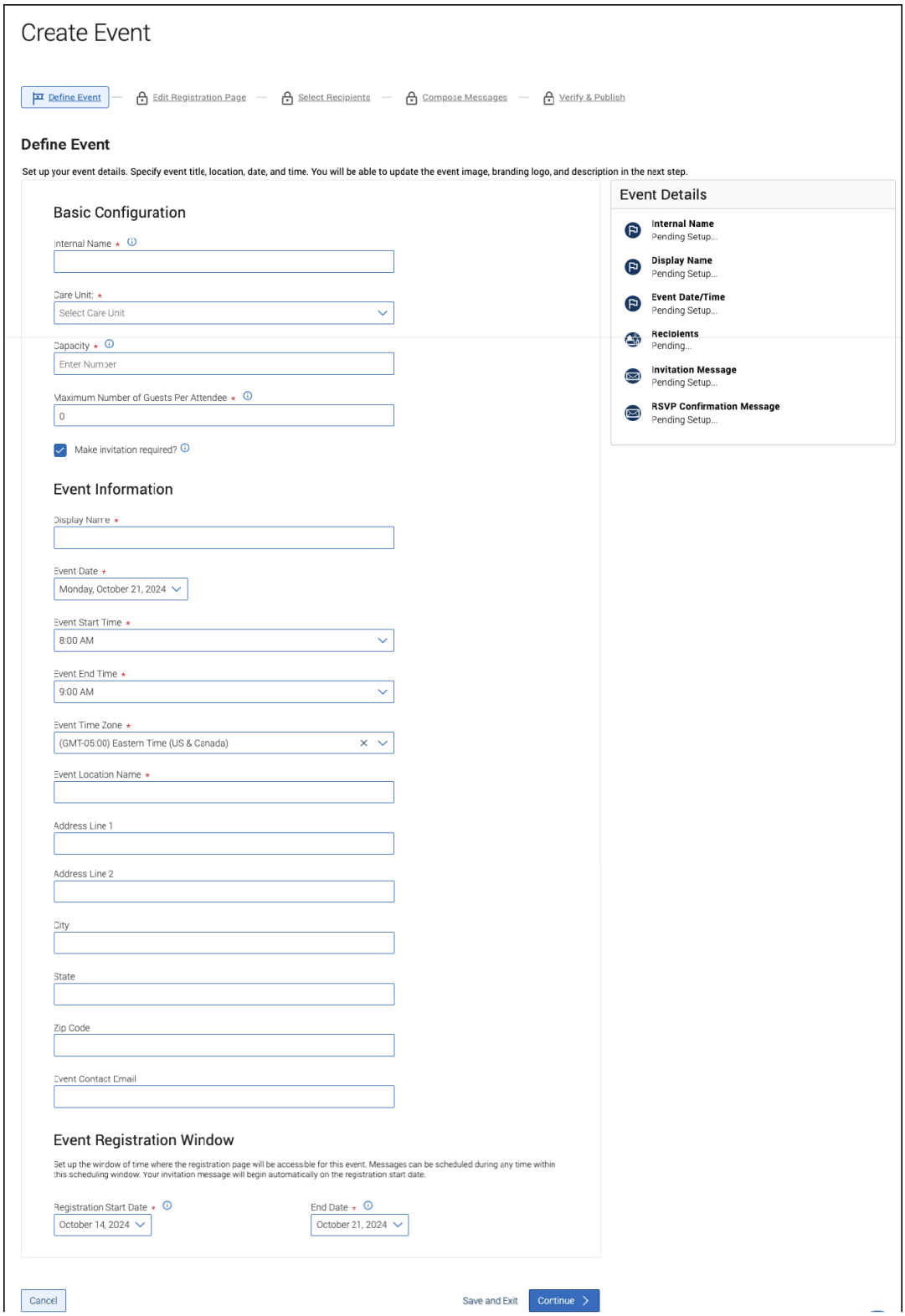
To begin, open the **Campaigns & Events** page and select **Add New** from the Events section.



Define the Event

The **Create Event** page opens. The fields that must be filled out are listed and defined below.

Events must be at least one day in the future.



Internal Event Title

The Internal Event Title is visible to the person creating the event and any other users who have access to view events, 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 events.

> **Note.** Start event names with the most important info so it's easy to identify the purpose and to avoid title duplication.

Care Unit

Events are tied to Care Units.

Capacity

The maximum number of attendees, both invitees and guests.

Maximum Number of Guests per Attendees

If guests are included with an invitation, the maximum number of guests the invitee can add when responding.

Make Invitation Required?

If this box is checked, then only students directly invited through the event structure would be able to RSVP for the event and attend. If this box is NOT checked, the event is displayed to all students in Student Engagement Hub on the public calendar and the Event List. If students who have not been invited should not be able to see the event, we recommend marking this event as Invitation Required.

Display Name

The event name invitees see in the invitation message for the event. Field is required.

Event Date

Date of the event. This must be at least one day in the future. Field is required.

Event Start Time

Time the event starts. Field is required.

Event End Time

Time the event ends. Field is required.

Event Time Zone

Time zone the event takes place in. This will be your institution's time zone by default. Field is required.

Event Location Name

Where the event takes place. This can be a physical or virtual location. Field is required.

Address Line 1 (optional)

Address for the event. This field is optional.

Address Line 2 (optional)

Address for the event. This field is optional.

City (optional)

City the event takes place in. This field is optional.

State (optional)

State the event takes place in. This field is optional.

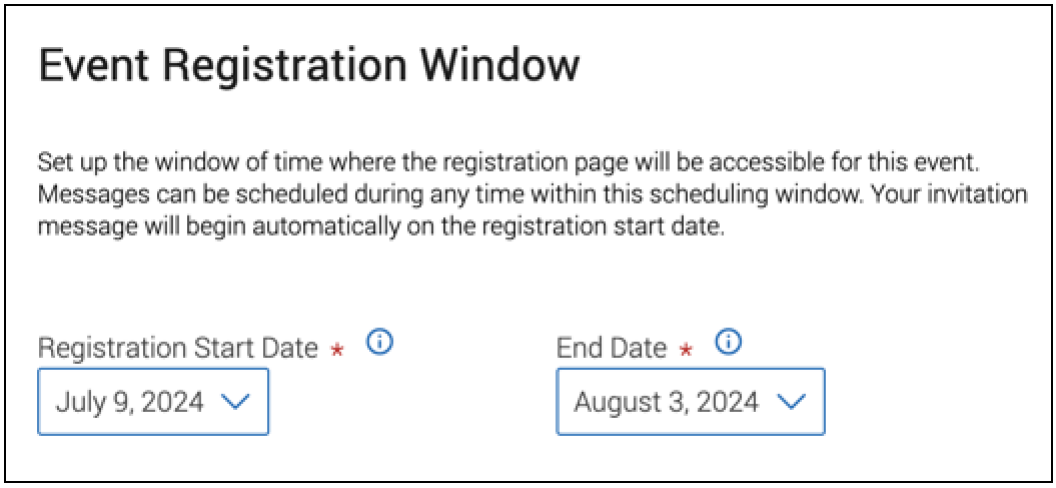
Zip Code (optional)

Zip code the event takes place in. This field is optional.

Event Contact Email

A contact email for the event.

The next two fields are part of the *Event Registration Window*, which is the time period where the registration page is accessible for the event. Messages can be scheduled any time during this window and the invitation message (similar to a welcome message) is sent on the Registration Start Date. Both date fields are required.



Registration Start Date

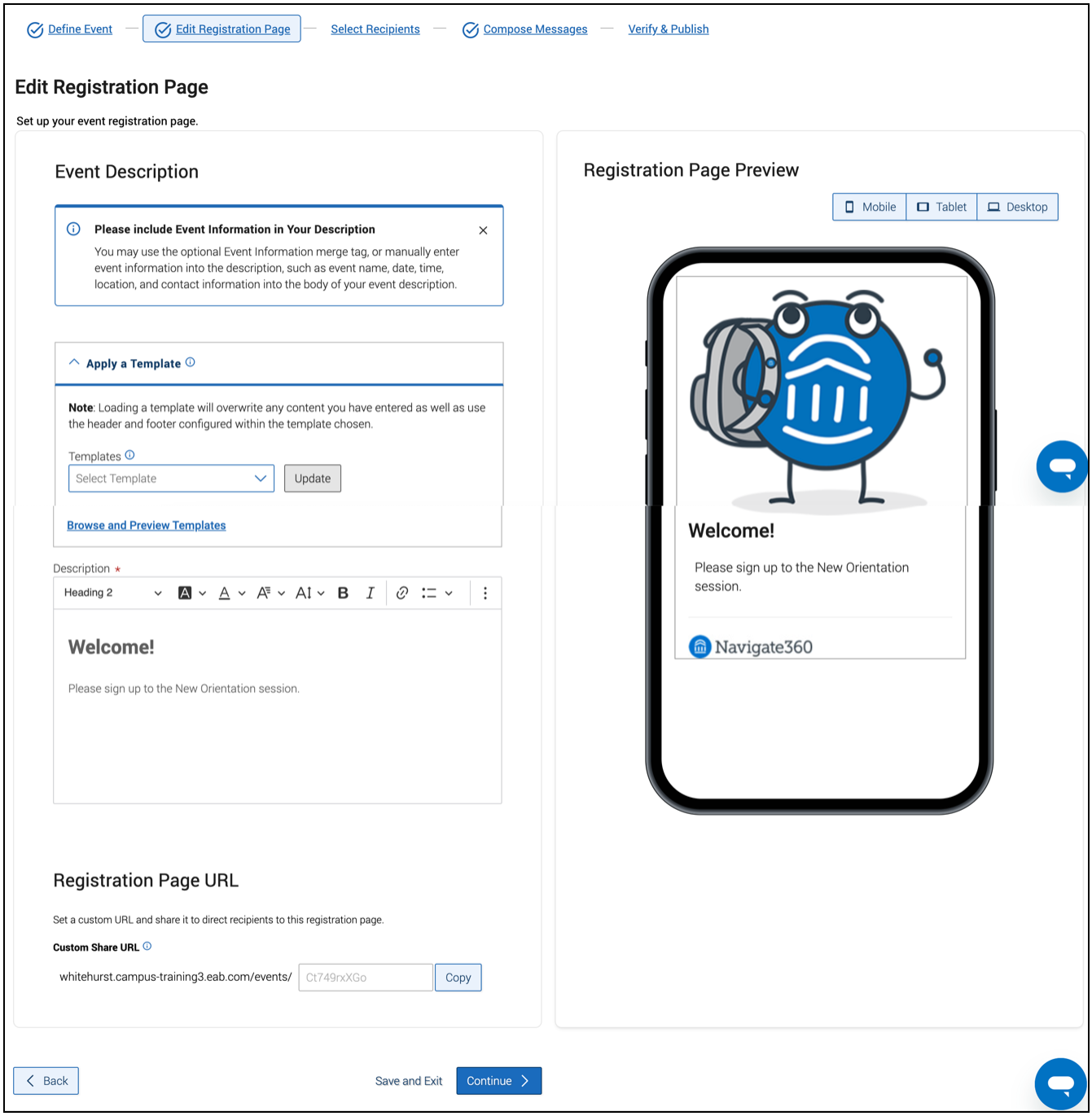
Date when invitees can begin registering for the event. This can be the same day as the Event creation.

End Date

Date when the registration window closes and invitees can no longer RSVP/register for the event. This must be at least one day in the future.

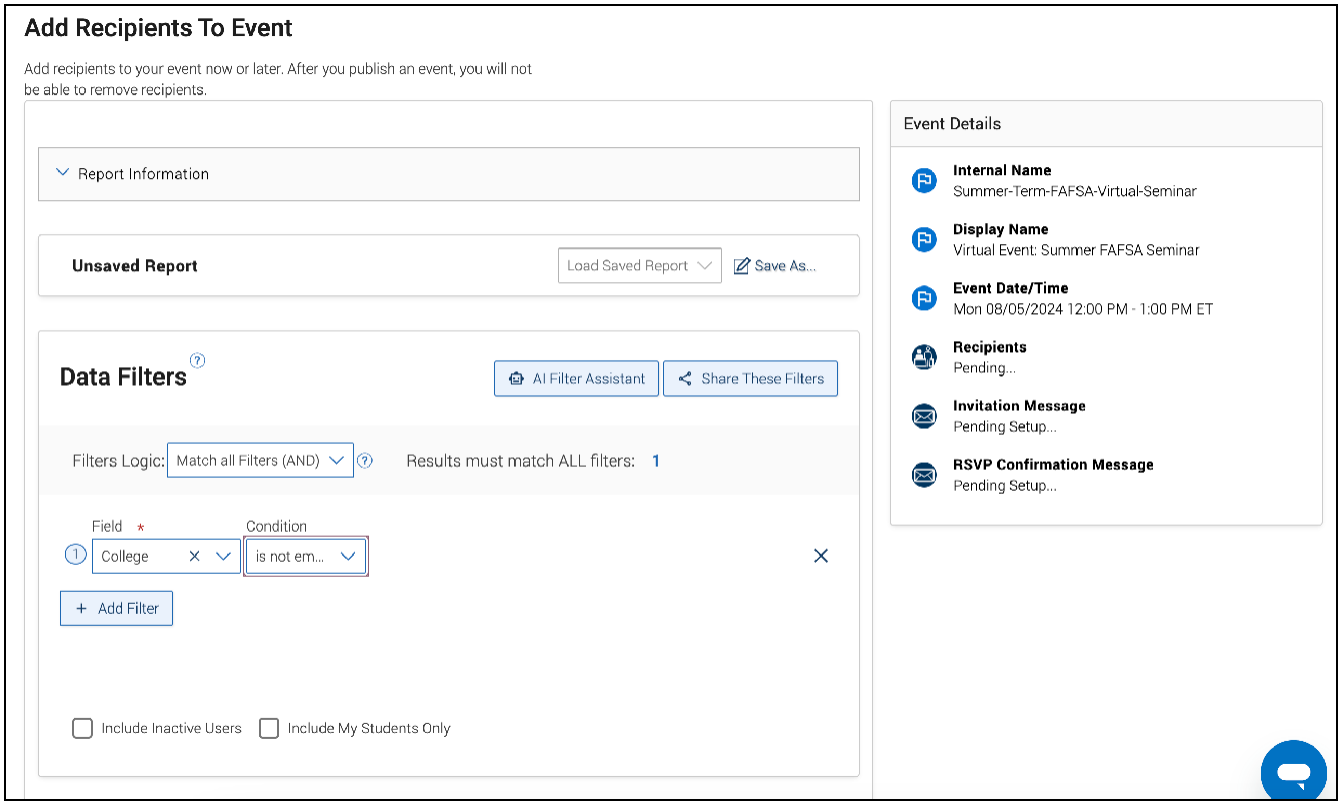
Edit Registration Page

Next, you create a registration page that displays to students when they click the event registration link. You can apply an Event Landing Page content template here. This step displays a Registration Page Preview and has a customizable registration page URL. One field is required: **Event Description.** This field is what displays to students when they open the registration page. You can insert Event Information on this page with the Merge Tags field.

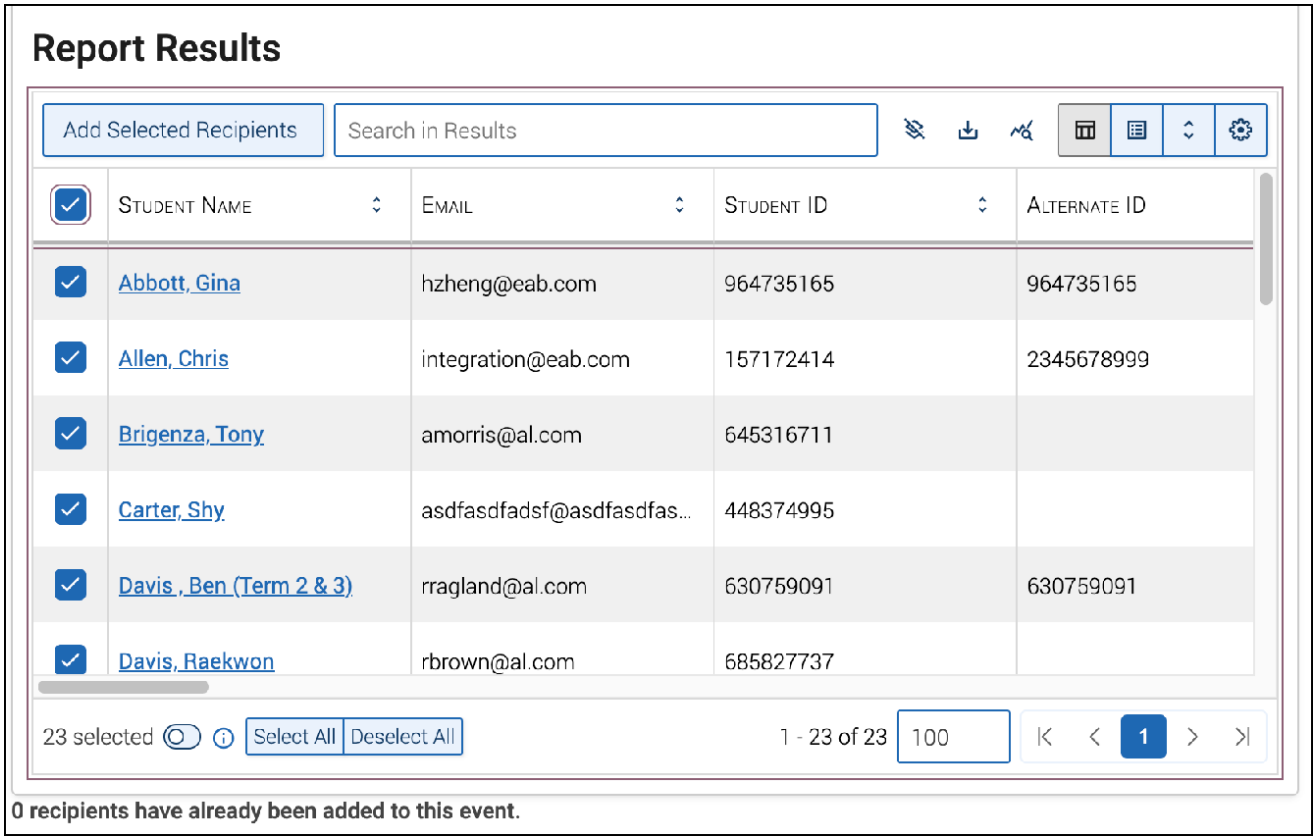


Add Recipients to Event

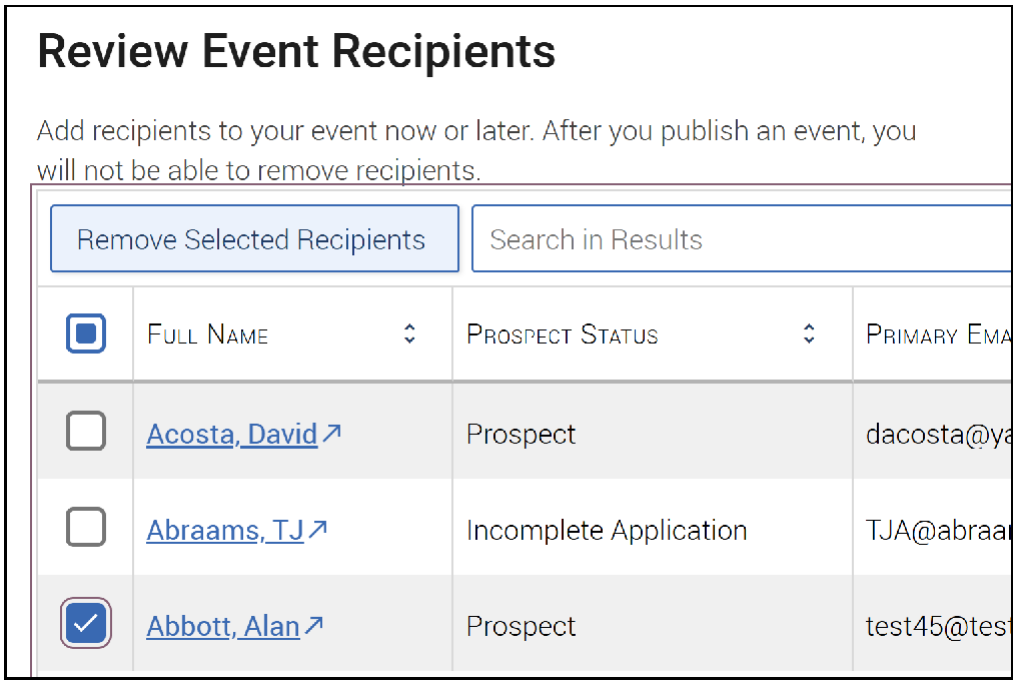
The next step is creating a V3 report search to add recipients to the event. This can be done immediately or later. However, once an event is published, you cannot remove recipients.



Set your criteria and then select **Run Report.** The students appear in Report Results. Select the students you want to add to the event by checking the box in front of their name and then click **Add Selected Recipients.**



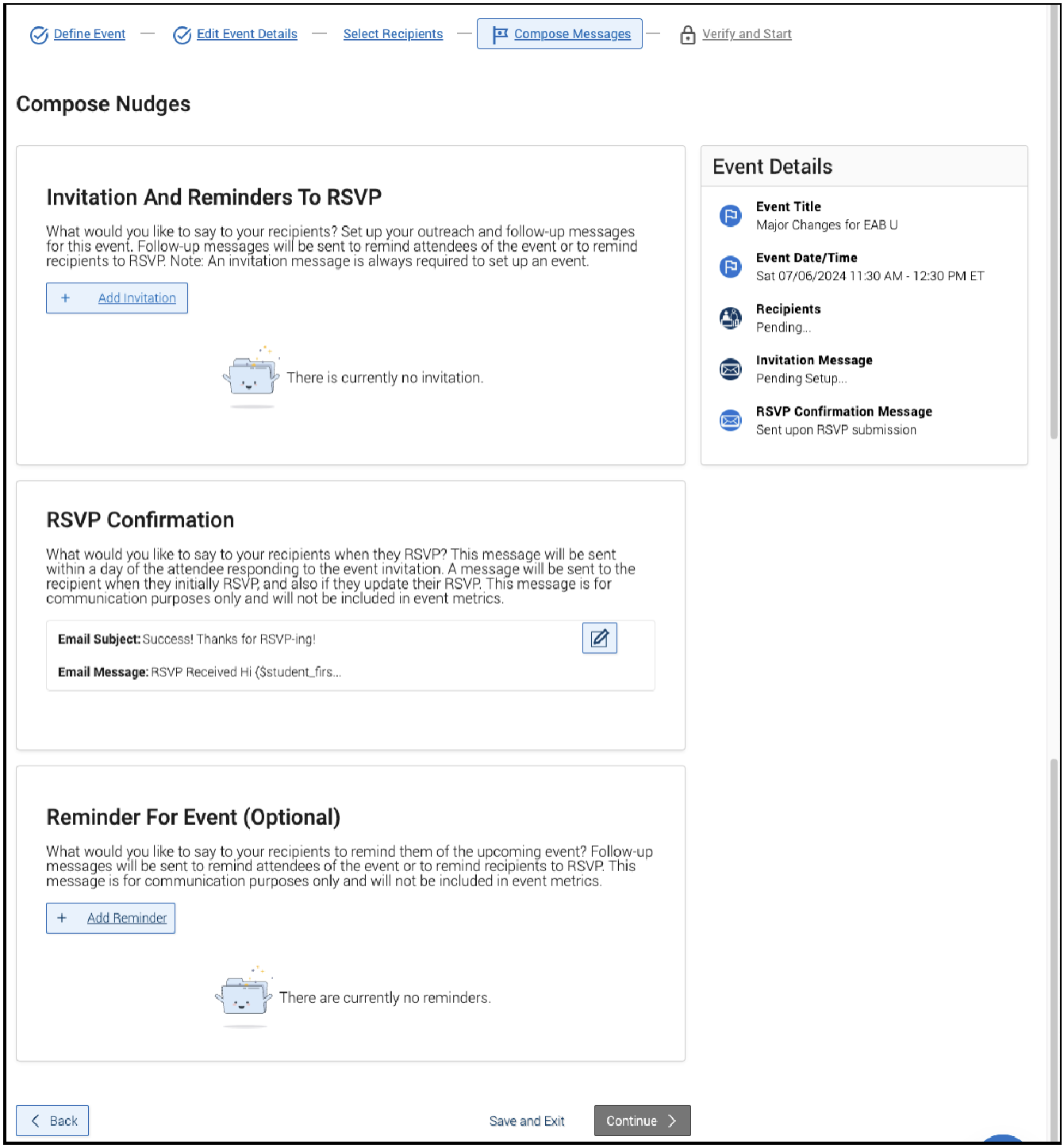
Review the students on the next page. If a student should not be in the campaign, select the box next to their name and choose **Remove Selected Recipients**.



Once finished setting your list of recipients, click **Continue.**

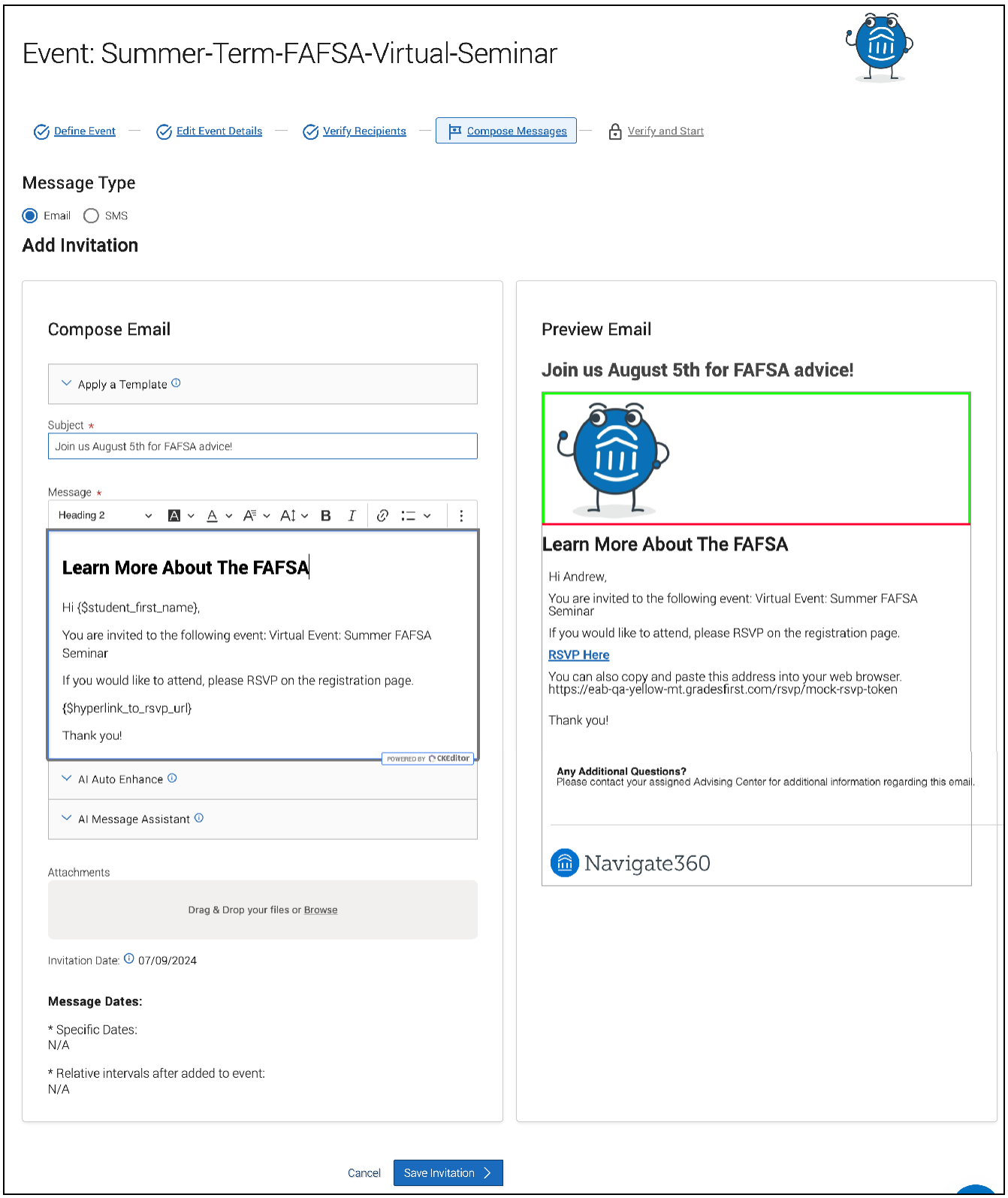
Compose Messages

There are three types of messages for an Event: the invitation and reminders to RSVP, RSVP confirmation, and event reminders. Users need to compose at least an invitation and the RSVP confirmation on this page.



Click **Add Invitation** to create your invitation. You can create either an email or SMS invitation. Note that you can only create one message of a single type per day. So for example, you can't have a text and an email message go out the same day, but you can have your invitation email the first day, then a text reminders to RSVP the next day, and so on.

There are no limits on how many reminders to RSVP you can send beyond the number of days in the Event Registration window and the one-message-per-day limit.



When you select the Email type, a page like the one above displays. Enter a subject line and customize the message. For email messages, you can add an attachment to the message. You can see a preview of the message in a panel right of the composition panel. Content Templates can be used when creating these messages for Email or Text.

Fields used in the message composition are:

Subject

The subject of the email going to the student.

Message

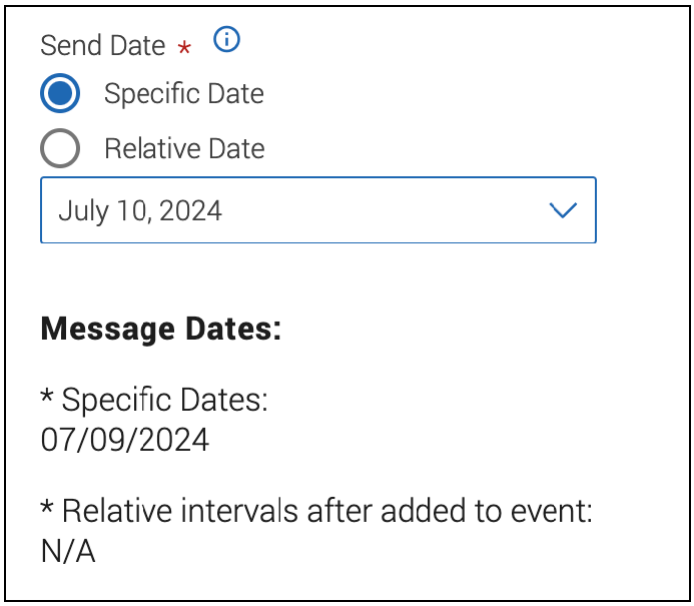
The customized email message going to the student. Merge tags are available for this message and are shown beneath the message field. If expanded merge fields are available, these appear instead of the legacy merge tags and use the columns from the V3 Students report.

Send Date (Only for Reminders)

The date the message is sent. This field does not appear when creating the invitation, as the message sends on the first day of the registration window. If you add students later, the send date will be immediately after they are added. For non-Welcome Message nudges, you can send a message on a Specific Date or a Relative Date.

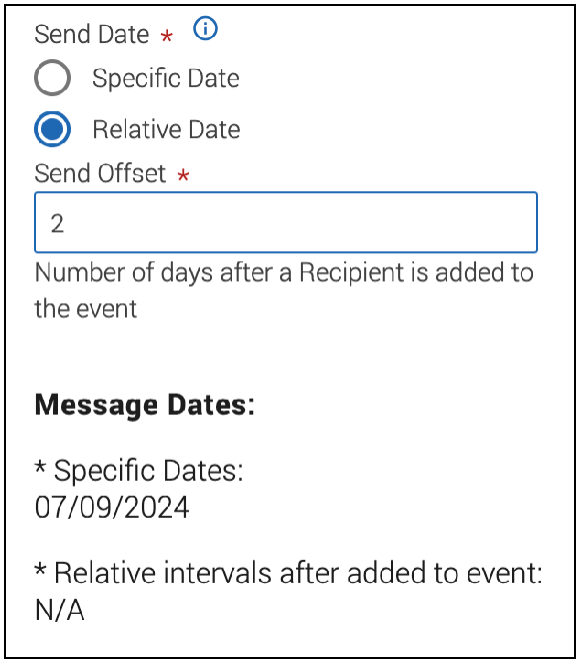
After creating a nudge, click **Save Invitation** to continue.

For RSVP reminders, you can send the nudge on a specific date or a relative date.

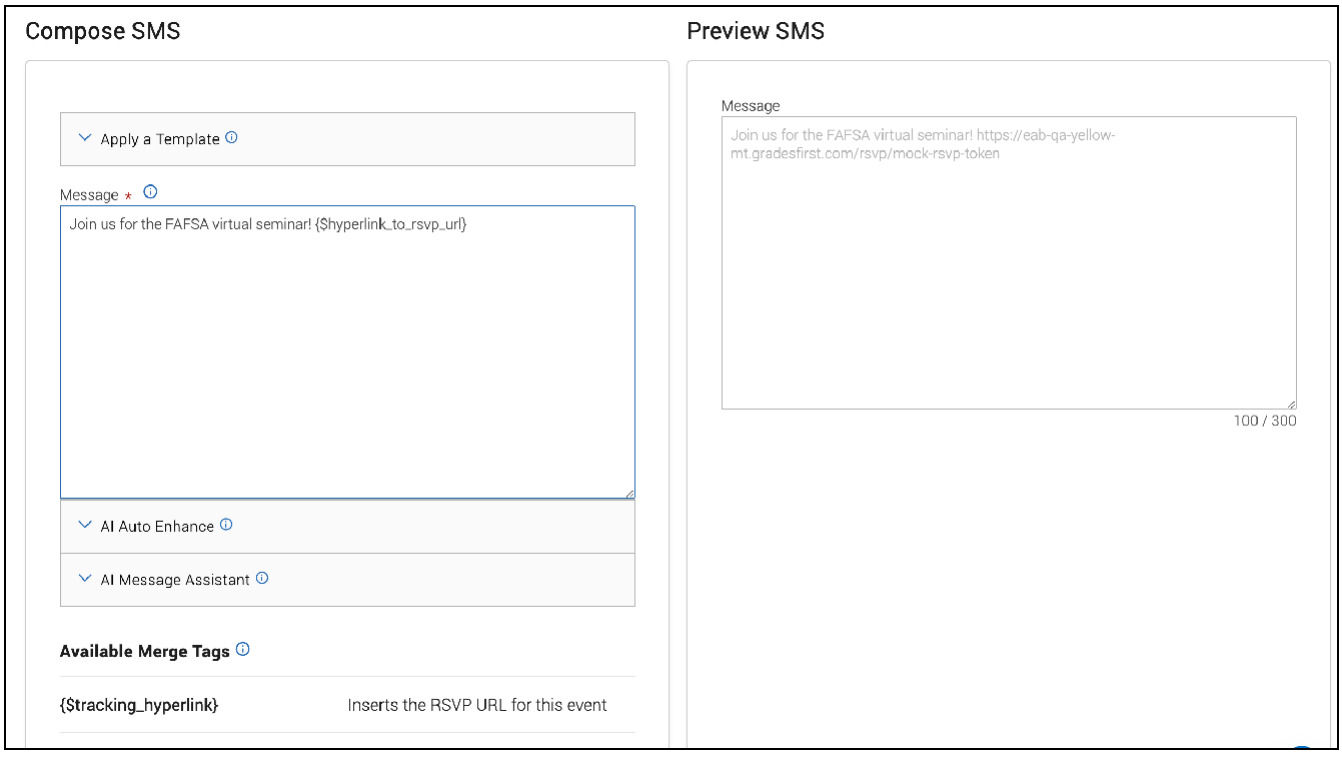


Sending on a specific date is more useful if you have an event that will not add many (if any) new students. If a student is added after a specific date reminder, they do not receive the reminder.

A relative date may be more helpful if you are using an automation to add students to the event, or if you will be adding new students to an event regularly. This allows you to send a nudge X number of days after being added to the event based on what you enter in the *Send Offset* field.



When you select the SMS nudge type, the Compose SMS page displays.



The SMS must be 300 characters or less, and the registration page URL counts toward the limit. You can insert the registration page URL by using the {$tracking hyperlink} merge tag. SMS nudges cannot be styled and pictures cannot be added.

Set a Send Date, create your SMS reminder and select **Save RSVP Reminder** to add it to your event.

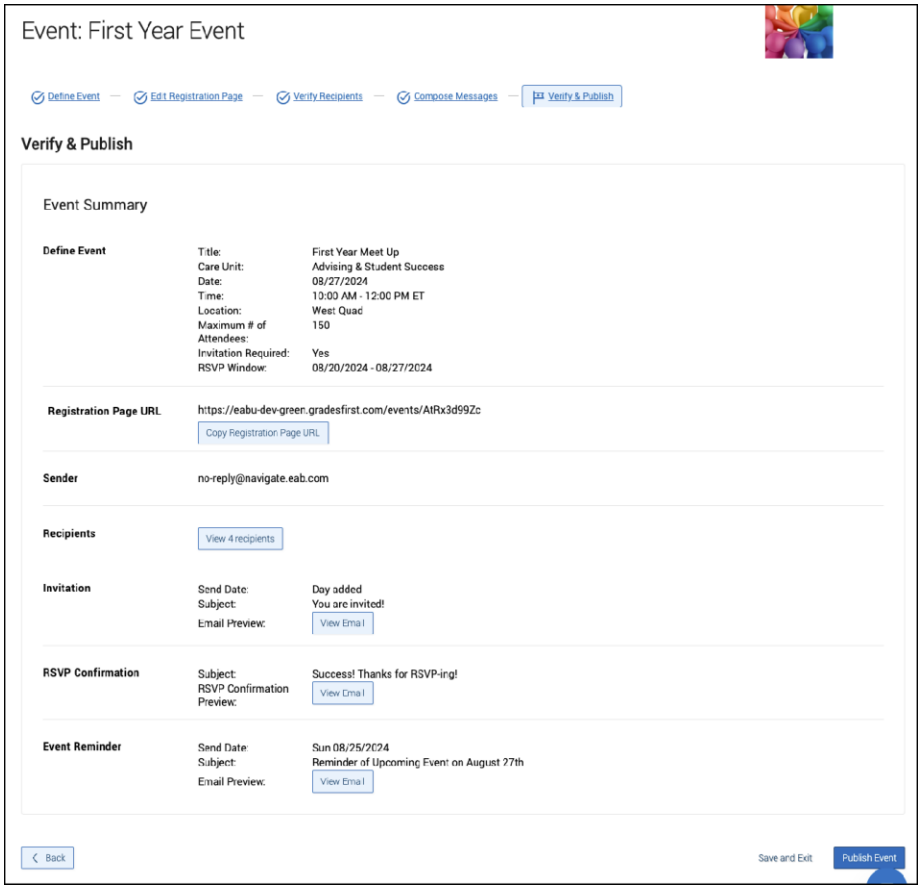
> **Important.** You must have an RSVP confirmation for a student to publish your event. Creating an RSVP confirmation is the same as creating other messages for your event, but the RSVP confirmation allows students to update their RSVP as needed.

After composing all messages for your event, including RSVP reminders and event reminders, which are two separate things (RSVP reminders are for recipients who have not yet RSVP'd to the event; event reminders are for recipients who have RSVP'd yes for an event), select **Continue** to finish creating your event. You may want to add the QR code or link to an event reminder, for example, making it simple for students to check in to an event they have RSVP'd to.

Verify & Publish

> **Note.** Recipients cannot be removed from the Event after it is published.

Review your event on this page before publishing. Event details, recipients, and messages are displayed on this page for a final check before publication, as recipients cannot be removed after publishing the event. Use the **View Email** button to view the message in different formats.



One unique field on this page is the *Registration Page URL*. This is the URL recipients are sent to when RSVP'ing to the event. Users can select **Copy Registration Page URL** and paste it into a browser window to preview the page before publishing the event.

Click **Publish Event** when you are ready to send the invites to the selected students.

Frequently Asked Questions

Should I mark my event as Invitation Required?

Now that events where invitations are not required show on the School Event Calendar for Navigate360 Student **and** on the Event List in Navigate360 Student, our users may be unsure the best way to handle the Invitation Required checkbox when creating an event. Here are the three scenarios possible:

1. Invitation Required **NOT** checked and no recipients added: students see this event on the Calendar and their Event list on the Navigate360 Student app and can RSVP from Navigate360 Student.
2. Invitation Required **NOT** checked and recipients added: Event still appears on Calendar and Event list on the Navigate360 Student app. Uninvited students may still RSVP from the app. However, the added recipients receive email/SMS communication (e.g. invitations and reminders) created as part of the Event creation.
3. Invitation Required: Only added recipients receive the invitation and reminder communications. Only these students can view the event on the Calendar and Event List in Navigate360 Student and only they can RSVP.