

Creating an Event in Student Success



Help Center Manager
6 days ago Updated

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](#).

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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.

Events

Events

Allows staff to reach out to specific student populations and encourage them to RSVP for an event. Event Campaigns are best deployed by staff members seeking to encourage students to attend an upcoming event.

+ Add New

Events can also be added from **My Calendar** if the user has permissions to create their own events.

My Calendar

Calendar View

List of Calendar Items

Settings and Sync

The calendar view is a graphical representation of the calendar. If you need a **fully accessible** interface, please use the list of calendar items view here: [Calendar Items View](#).

Checking/unchecking the legend boxes will show/hide corresponding events on the calendar

☒ Course

☒ Assignment

☒ General

☒ Busy

☒ Cancelled

☒ School Wide Event

☒ Event Rsvp

* All times listed are in Eastern Time (US & Canada).

Print Calendar (PDF)

Add +

Schedule Appointment

Create Event

July 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13

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.

Create Event

- Define Event
- Edit Registration Page
- Select Recipients
- Compose Messages
- Verify & Publish

Define Event

Set up your event details. Specify event title, location, date, and time. You will be able to update the event image, branding logo, and description in the next step.

Basic Configuration

Internal Name * ⓘ

Care Unit: *

Select Care Unit

Capacity * ⓘ

Maximum Number of Guests Per Attendee * ⓘ

☒ Make invitation required? ⓘ

Event Information

Display Name *

Event Date *

Monday, October 21, 2024

Event Start Time *

8:00 AM

Event End Time *

9:00 AM

Event Time Zone *

(GMT-05:00) Eastern Time (US & Canada)

Event Location Name *

Address Line 1

Address Line 2

City

State

Zip Code

Event Contact Email

Event Registration Window

Set up the window of time where the registration page will be accessible for this event. Messages can be scheduled during any time within this scheduling window. Your invitation message will begin automatically on the registration start date.

Event Details

- Internal Name

Pending Setup...
- Display Name

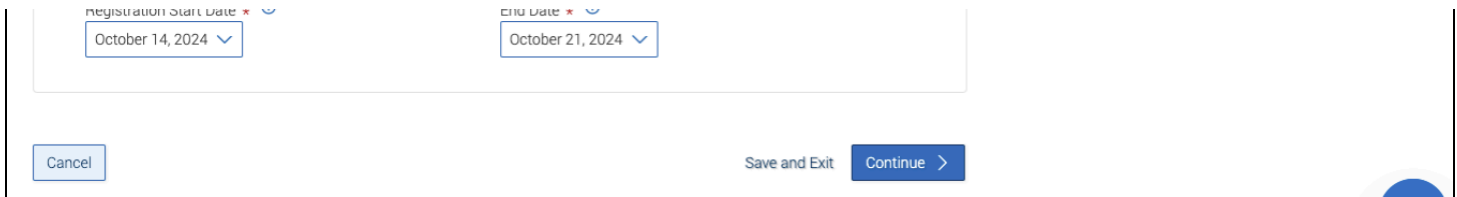
Pending Setup...
- Event Date/Time

Pending Setup...
- Recipients

Pending...
- Invitation Message

Pending Setup...
- RSVP Confirmation Message

Pending Setup...



Registration Start Date: October 14, 2024

End Date: October 21, 2024

Buttons: Cancel, Save and Exit, Continue

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.

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.

Event Registration Window

Set up the window of time where the registration page will be accessible for this event. Messages can be scheduled during any time within this scheduling window. Your invitation message will begin automatically on the registration start date.

Registration Start Date * ⓘ
July 9, 2024 ▼

End Date * ⓘ
August 3, 2024 ▼

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.

[Define Event](#) —
 [Edit Registration Page](#) —
 [Select Recipients](#) —
 [Compose Messages](#) —
 [Verify & Publish](#)

Edit Registration Page

Set up your event registration page.

Event Description

Please include Event Information in Your Description

You may use the optional Event Information merge tag, or manually enter event information into the description, such as event name, date, time, location, and contact information into the body of your event description.

Apply a Template

Note: Loading a template will overwrite any content you have entered as well as use the header and footer configured within the template chosen.

Templates

[Browse and Preview Templates](#)

Description *

Heading 2

Welcome!

Please sign up to the New Orientation session.

Registration Page URL

Set a custom URL and share it to direct recipients to this registration page.

Custom Share URL

Registration Page Preview

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.

Add Recipients To Event

Add recipients to your event now or later. After you publish an event, you will not be able to remove recipients.

▼ Report Information

Unsaved Report

Load Saved Report ▼

Save As...

1

Field *

College

×

▼

Condition

is not em...

▼

+ Add Filter

☐ Include Inactive Users

☐ Include My Students Only

AI Filter Assistant

Share These Filters

Filters Logic: Match all Filters (AND) ▼ ?

Results must match ALL filters: 1

Event Details

Internal Name

Summer-Term-FAFSA-Virtual-Seminar

Display Name

Virtual Event: Summer FAFSA Seminar

Event Date/Time

Mon 08/05/2024 12:00 PM - 1:00 PM ET

Recipients

Pending...

Invitation Message

Pending Setup...

RSVP Confirmation Message

Pending Setup...

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**.

Report Results

Add Selected Recipients
Search in Results

<input checked="" type="checkbox"/>	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID
<input checked="" type="checkbox"/>	Abbott, Gina	hzheng@eab.com	964735165	964735165
<input checked="" type="checkbox"/>	Allen, Chris	integration@eab.com	157172414	2345678999
<input checked="" type="checkbox"/>	Brigenza, Tony	amorris@al.com	645316711	
<input checked="" type="checkbox"/>	Carter, Shy	asdfasdfsdf@asdfasdfs...	448374995	
<input checked="" type="checkbox"/>	Davis, Ben (Term 2 & 3)	rragland@al.com	630759091	630759091
<input checked="" type="checkbox"/>	Davis, Raekwon	rbrown@al.com	685827737	

23 selected
Select All
Deselect All

1 - 23 of 23
100
K < 1 > >I

0 recipients have already been added to this event.

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**.

Review Event Recipients

Add recipients to your event now or later. After you publish an event, you will not be able to remove recipients.

Remove Selected Recipients
Search in Results

<input type="checkbox"/>	FULL NAME	PROSPECT STATUS	PRIMARY EMAIL
<input type="checkbox"/>	Acosta, David	Prospect	dacosta@ya
<input type="checkbox"/>	Abraams, TJ	Incomplete Application	TJA@abraa
<input checked="" type="checkbox"/>	Abbott, Alan	Prospect	test45@test

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.


[Define Event](#) — [Edit Event Details](#) — [Select Recipients](#) — [Compose Messages](#) — [Verify and Start](#)

Compose Nudges

Invitation And Reminders To RSVP


What would you like to say to your recipients? Set up your outreach and follow-up messages for this event. Follow-up messages will be sent to remind attendees of the event or to remind recipients to RSVP. Note: An invitation message is always required to set up an event.

[+ Add Invitation](#)

 There is currently no invitation.

RSVP Confirmation

What would you like to say to your recipients when they RSVP? This message will be sent within a day of the attendee responding to the event invitation. A message will be sent to the recipient when they initially RSVP, and also if they update their RSVP. This message is for communication purposes only and will not be included in event metrics.


Email Subject: Success! Thanks for RSVP-ing! 

Email Message: RSVP Received Hi {Student_firs...

Reminder For Event (Optional)

What would you like to say to your recipients to remind them of the upcoming event? Follow-up messages will be sent to remind attendees of the event or to remind recipients to RSVP. This message is for communication purposes only and will not be included in event metrics.

[+ Add Reminder](#)

 There are currently no reminders.

[< Back](#)

Save and Exit

Continue >

Event Details

- Event Title**
Major Changes for EAB U
- Event Date/Time**
Sat 07/06/2024 11:30 AM - 12:30 PM ET
- Recipients**
Pending...
- Invitation Message**
Pending Setup...
- RSVP Confirmation Message**
Sent upon RSVP submission

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.



Event: Summer-Term-FAFSA-Virtual-Seminar

[Define Event](#) —
 [Edit Event Details](#) —
 [Verify Recipients](#) —
 [Compose Messages](#) —
 [Verify and Start](#)

Message Type

☒ Email
 ☐ SMS

Add Invitation

Compose Email

[Apply a Template](#)

Subject *

Join us August 5th for FAFSA advice!

Message *

Heading 2 [A](#) [A](#) [A](#) [A](#) [B](#) [I](#) [@](#) [:](#) [:](#) [:](#)

Learn More About The FAFSA

Hi {Student_first_name},

You are invited to the following event: Virtual Event: Summer FAFSA Seminar

If you would like to attend, please RSVP on the registration page.

{Hyperlink_to_rsvp_url}

Thank you!

POWERED BY CKEditor

[AI Auto Enhance](#)

[AI Message Assistant](#)

Attachments

Drag & Drop your files or [Browse](#)

Invitation Date: [07/09/2024](#)

Message Dates:

* Specific Dates:
N/A

* Relative intervals after added to event:
N/A

Preview Email

Join us August 5th for FAFSA advice!



Learn More About The FAFSA

Hi Andrew,

You are invited to the following event: Virtual Event: Summer FAFSA Seminar

If you would like to attend, please RSVP on the registration page.

[RSVP Here](#)

You can also copy and paste this address into your web browser.
<https://eab-qa-yellow-mt.gradesfirst.com/rsvp/mock-rsvp-token>

Thank you!

Any Additional Questions?

Please contact your assigned Advising Center for additional information regarding this email.

 **Navigate360**

Cancel

Save Invitation >

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.

Send Date * ⓘ

☒ Specific Date

☐ Relative Date

July 10, 2024

▼

Message Dates:

* Specific Dates:

07/09/2024

* Relative intervals after added to event:

N/A

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.

Send Date * ⓘ

☐

 Specific Date

☒

 Relative Date

Send Offset *

2

Number of days after a Recipient is added to the event

Message Dates:

* Specific Dates:

07/09/2024

* Relative intervals after added to event:

N/A

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

Compose SMS

▼ Apply a Template ⓘ

Message * ⓘ

Join us for the FAFSA virtual seminar! {\$hyperlink_to_rsvp_url}

▼ AI Auto Enhance ⓘ

▼ AI Message Assistant ⓘ

Available Merge Tags ⓘ

{\$tracking_hyberlink}

Inserts the RSVP URL for this event

Preview SMS

Message

Join us for the FAFSA virtual seminar! https://eab-qa-yellow-mt.gradesfirst.com/rsvp/mock-rsvp-token

100 / 300

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_hyberlink} 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.

<https://helpcenter.eab.com/hc/en-us/articles/24759155166743-Creating-an-Event-in-Student-Success>

13/15

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

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.



Event: First Year Event

- [Define Event](#)
- [Edit Registration Page](#)
- [Verify Recipients](#)
- [Compose Messages](#)
- [Verify & Publish](#)

Verify & Publish

Event Summary

Define Event

Title:

Care Unit:

Date:

Time:

Location:

Maximum # of Attendees:

Invitation Required:

RSVP Window:

First Year Meet Up

Advising & Student Success

08/27/2024

10:00 AM - 12:00 PM ET

West Quad

150

Yes

08/20/2024 - 08/27/2024

Registration Page URL

https://eabu-dev-green.gradesfirst.com/events/AtRx3d99Zc

Copy Registration Page URL

Sender

no-reply@navigate.eab.com

Recipients

View 4 recipients

Invitation

Send Date:

Subject:

Email Preview:

Day added

You are invited!

View Email

RSVP Confirmation

Subject:

RSVP Confirmation Preview:

Success! Thanks for RSVP-ing!

View Email

Event Reminder

Send Date:

Subject:

Email Preview:

Sun 08/25/2024

Reminder of Upcoming Event on August 27th

View Email

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.