



Purdue University West Lafayette/Indianapolis

Last Updated April 2024

BoilerConnect and Purdue All Aboard 2024

Creating Appointment Campaigns

Overview:

An Appointment Campaign is an important feature that allows staff members to reach out to specific populations of students to encourage them to schedule appointments. This functionality is commonly used when you have identified a population of students in need of additional support, and you are sending them a request to schedule an appointment with you.

The expectation for is for all New Student Appointments to be scheduled for an advising appointment through BoilerConnect.

Log in:

Log in to www.purdue.edu/boilerconnect.

Create Campaign Availability:

From your Staff Home page, click the "My Availability" tab.

Staff Home

Students Upcoming Appointments **My Availability** Appointment Queues

My Assigned Students for Fall 2019

Actions	STUDENT NAME	ID	WATCH LIST	CUMULATIVE GPA
<input type="checkbox"/>	1			2.80
<input type="checkbox"/>	2			3.18
<input type="checkbox"/>	3			2.97
<input type="checkbox"/>	4			2.63
<input type="checkbox"/>	5			3.50
<input type="checkbox"/>	6			3.76
<input type="checkbox"/>	7			3.55
<input type="checkbox"/>	8			3.05

Actions

I want to...
Issue an Alert

Quick Links

Take me to...
School Information
Download Center for Reports
Campaigns...
Appointment Campaigns

Upcoming Appointments

You have no upcoming appointments.

Click on **Actions** and choose **Add Time**.

Staff Home

Students Upcoming Appointments My Availability Appointment Queues

Available Times

Actions

- Add Time
- Copy Time
- Delete Time

DAY OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
No available times have been listed. To add a time, click the "Add Time" button.					



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Set up your campaign appointment availability.

1. Select the days of the week you want to be available for appointments.

ADD AVAILABILITY

When are you available to meet?

Mon **Tue** Wed Thu Fri Sat Sun

2. Choose the time frame you want to be available for appointments. The systems "talks" to Outlook, so appointments will not be able to be made at the same time as something already scheduled on your calendar.

From: 8:00am To: 5:00pm

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

How long is this availability active?

Please select a duration

3. Select your availability duration.

Add to your personal availability link?

Add this availability to your personal availability link?

4. Leave PAL unchecked since this is a campaign.

What type of availability is this?

Appointments Drop-ins **Campaigns**

5. Select "Campaigns."

Meeting Type

Please select Meeting Types

6. Select "Virtual" for meeting type.

Care Unit

Please select a care unit

Location

Please select a location

7. Select the appropriate Care Unit and Location for you.

Cancel Save



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Services

Please select services

8. Select the service(s) students will be receiving in this appointment (Advising units ONLY use "New Student (All Aboard)")

URL / Phone Number

9. Include phone number or URL for your personal meeting room in Webex or Zoom.

Special Instructions for Student

B *I* | |

e.g. room 23, please bring paper

10. Include any special instructions (example: All appointments are currently taking place via Zoom. If this platform does not work for you, please indicate your preferred method of meeting in the Comments section.)

Will you be meeting with multiple students?

These settings will not be used for kiosk and campaign purposes.

Max Number of Students per Appointment

Cancel

Save

11. Click "Save."



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Creating an Appointment Campaign:

From your Staff Home page, click on **Appointment Campaigns** in the **Quick Links** box on the right side of the screen.

The screenshot shows the Staff Home page with a navigation bar at the top containing 'Students', 'Upcoming Appointments', 'My Availability', and 'Appointment Queues'. Below this is the 'Available Times' section with a table of appointment slots. A yellow arrow points from the 'Appointment Campaigns' link in the 'Quick Links' box on the right side of the page to the 'Appointment Campaigns' link in the 'Quick Links' box.

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Burton D. Morgan Center for Entrepreneurship (MRGN Z20D)	Non-Major Advising For: Campaigns	Academic Advising	Edit

Click on **+Add New** button on the right side of the screen.

Appointment Campaigns

[View All Campaign Types](#)

Filter by care unit:

[+ Add New](#)

View only my campaigns

Define your campaign by selecting the appropriate information for you.

**Note: Choosing more than one for the Appointment Limit will prompt students to schedule an appointment until they have fulfilled the total number set as the limit. Example: limit is set to 3, student will be prompted to schedule an appointment until 3 total appointments have been scheduled.*



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New Appointment Campaign

1 Define Campaign — Select Recipients — Select Staff —

This is what the student sees when they open the Appointment Campaign notification

Define Campaign
Set up your campaign. Specify your appointment details and timing.

Campaign Configurations

* Campaign Name: [Text Field] Instructions or Notes for Landing Page: [Text Field]

* Care Unit: [Select Care Unit] * Location: [Select Location]

* Service: [Select Service]

Appointment Configurations

* Appointment Limit: [1] * Appointment Length: [30 min]

* Slots Per Time: [1]

Number of appointments a single student can schedule*

Number of students per appointment slot

Must match availability service (Advising units ONLY use "New Student (All Aboard)")

All Aboard 2024— College – Advisor Name

Scheduling Window
Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

* Start Date: [Monday, March 14th 2022] * End Date: [Monday, March 28th 2022]

Cancel Save and Exit Continue >

TIMELINE

- Objective Pending Setup...
- Recipients Pending Setup...
- Staff Pending Setup...
- Nudge 1 Pending Setup...
- Campaign Ends Pending Setup...

Group Advising Tip: The "Slots Per Time" box should match the number of students you will be meeting with at one time.

Scheduling Window

Campaign appointments and events can be scheduled on any date within the scheduling window. For one-time events, select the same date for the start and end dates. Your campaign will begin automatically on the date of your first nudge.

Start Date *

April 22, 2024

End Date *

May 6, 2024

Launch Date

This is the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.

Launch Date *

April 22, 2024

Your **Scheduling Window** is when you want students to make the appointments. The **Launch Date** is when this campaign will be sent to students to schedule. This means you can send your campaign days or weeks before you will actually meet with them for your campaign.



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Your next step is adding students. The Advanced Search screen will open.

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Performance Data GPA, Hours, Credits

Term Data Classification, Term GPA

Course Data Course, Section, Status

Assigned To Advisor

Success Indicators Success Markers

My Students Only Include Inactive

Copy all of the PUIDs from your list of students who have completed the Student Information Form (SIF). Paste them (all at once) into the **Student ID** box under the Student Information block (no commas needed).

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

First Name?

Last Name?

From Last Name?

To Last Name?

Student ID?

Gender

Race

Watch List (In Any of These)

Transfer Student

After starting the search, you will be presented with a list of students. Double check that the total number of students returned in the search matches the number of PUIDs copied you're your list of students who completed Purdue 101. **If it did not, you may need to try the search again and check the **Include Inactive** box near the Search button.** Select the students you wish to add and then click the blue **Continue** button near the bottom right of the screen.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed by checking the box next to their name and choosing Actions → Remove.

You will be asked to review the students in the campaign. If these are correct, click **Continue**.



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If you are creating your campaign prior to having any students to add, please add Imogene Student (preferred name Lucy Student) to get your campaign started.

Add Staff to the Campaign:

Add applicable staff to the campaign by checking the box to the left of their name. Often this will only be you, though if you are creating a campaign for someone else you will choose their name. If you do not see the name of the staff member you are trying to add, refer to the earlier step [Create your Campaign Availability](#).

Add Organizers To Campaign

Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Staff Member	For: Campaigns Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	Albert	For: Campaigns Mon-Fri 8:00am-5:00pm

< Back

Save and Exit

Continue

“Include Appointment Availabilities?” – To Check or Not to Check

If this box is checked, a student will be able to schedule appointments for any open time matching the organizer’s pre-set Appointment Availability AND Campaign Availability. If the box is not checked, the student will only be able to schedule appointments for any open time matching the organizer’s pre-set Campaign Availability.

Create Messaging:

Develop the text you would like the student to receive when you send the appointment campaign, as well as any follow up nudge emails for students who delay in scheduling their appointment. For New Student Appointments, we recommend only using the Welcome Message and using the Send a Message feature for any follow up communication.

Nudges are a feature that allows you to schedule follow up emails to students in your campaign who have not yet scheduled their appointment. Each nudge is an email sent to individuals in your campaign recipient list. Nudge emails are sent the morning of the date chosen when creating the nudge.

[*See a sample message at the end of this guide.](#)

The option to create a nudge(s) will appear after the campaign is defined and the list of students is created. To create a nudge:

1. Enter a **subject line** and **customize the message**. Available Merge Tags are listed under the Message text box and work exactly the same as they did previously. A preview of the message is shown in a panel to the right of the message composition panel. Files can be attached to this



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message.

2. Choose a **send date**. This is the date the email nudge will be sent. The Welcome Message will start your Appointment Campaign.
3. Click **Save Nudge** to continue. Multiple nudges can be created, though for New Student Appointments, we recommend only using the Welcome Message and using the Send a Message feature for any follow up communication.

The screenshot shows the 'Appointment Campaign: Graduation Checklist' interface. The 'Add Nudge' section on the left includes a subject line, a message editor with a preview of the email content, a table of available merge tags, and a 'Send Date' dropdown menu. The 'Preview Email' section on the right shows a preview of the email with a subject line, a header image, and the main body text. The 'Save Nudge' button is visible at the bottom right.

You also have the option to create a Success Message. This is an email sent the day after the recipient completes the objective (the scheduling of an appointment). The success message is for communication purposes only. Click **Add Success Message** to begin creating a success message.

Things to Note About Nudges:

- An unlimited number of nudges can be created
- Only one nudge email can be sent per day, and they must be scheduled to take place between the start and end date of the Appointment Campaign
- Users can edit/delete nudge emails until they are sent
- Users can continue to create additional nudges until the Appointment Campaign ends
- The nudge functionality is for email messaging only at this time

After you are finished creating nudges and your success message, click **Continue** to go to the *Confirm & Send* page.

Confirm and Send Campaign:

Review all the final campaign information. Click **Send** to activate the campaign. The initial message will be sent to students around 8:00am EST on the date the Welcome Message was scheduled for.

Be prepared!

Your calendar will fill up fast with appointments – so be sure your calendar is ready!



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Adding Additional Students to Your Appointment Campaign

Using appointment campaigns for New Student Appointments means that you will be adding students to the campaign on an ad-hoc basis as students continue to complete their Student Information Form (SIF).

Navigate to Your New Student Appointment Campaign:

Click the campaign icon from the menu on the left side of the screen.



Click on the **Appointment Campaigns**.

Campaigns

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New](#)

Select the hyperlink for the appropriate appointment campaign.

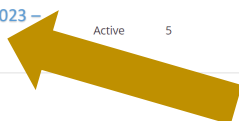
Appointment Campaigns

[View All Campaign Types](#)

[+ Add New](#)

Filter by care unit: Academic Support/Coaching View only my campaigns

NAME	STATUS	RECIPIENTS	APPTS SCHEDULED	APPTS ATTENDED	SUMMARIES CREATED
All Aboard 2023 - Zoo - Pete	Active	5	<div><div style="width: 60%;"></div></div> 60%	<div><div style="width: 60%;"></div></div> 60%	<div><div style="width: 100%;"></div></div> 100%





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Add Students to Campaign:

Click **Edit Campaign Details** on the right side of the screen.

Options

- [Edit Campaign Details](#)
- [Delete This Campaign](#)
- [Export Student List](#)

Then choose **Verify Recipients** from the top of the screen.

[✓ Define Campaign](#) — [✓ Verify Recipients](#) — [✓ Select Staff](#) — [✓ Compose Nudges](#) — [✓ Verify and Start](#)

Click **Add More Recipients**.

Review Students In Campaign

Actions ▾

- NAME
- Student, Imogene

[< Back](#) [Add More Recipients](#) Save and Exit [Continue](#)

Use the **Advanced Search** option to add the student(s) to your campaign.

Add Students To Campaign

[Invite All My Assigned Students](#)

[Advanced Search](#)



Advanced Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

[Student Information](#) First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

[Enrollment History](#) Enrollment Terms

[Area of Study](#) College/School, Degree, Concentration, Major

[Performance Data](#) GPA, Hours, Credits

[Term Data](#) Classification, Term GPA

[Course Data](#) Course, Status

[Assigned To](#) Advisor

[Success Indicators](#) Predicted Support Level, Success Markers



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Copy the PUIDs from your list of students. Paste them (all at once) into the **Student ID** box under the Student Information block (no commas needed).

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Type?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

First Name? <input type="text"/>	Last Name? <input type="text"/>	From Last Name? <input type="text"/>	To Last Name? <input type="text"/>	Student ID? <input type="text"/>
Gender <input type="text" value="All"/>	Race <input type="text" value="All"/>	Watch List (In Any of These) <input type="text" value="All"/>	Transfer Student <input type="text" value="Any"/>	

Select the student(s) you want to add to the campaign by checking the box to the left of their name. Once you have selected all the students you want to add, click **Continue**.

Actions ▾

<input type="checkbox"/> ALL		STUDENT NAME
<input type="checkbox"/>	1	Student, Imogene
<input checked="" type="checkbox"/>	2	Student, myPurdue
<input checked="" type="checkbox"/>	3	Student, Johnny
<input type="checkbox"/>	4	Student, Graduate
<input type="checkbox"/>	5	Student, Joe

Review the students in the campaign. Click **Add More Students** if you need to add more students. If the list is correct, click **Continue**.

Review Students In Campaign

Actions ▾

<input type="checkbox"/> NAME
<input type="checkbox"/> Student, Imogene
<input type="checkbox"/> Student, Johnny
<input type="checkbox"/> Student, myPurdue

[< Back](#) [Add More Students](#) [Save and Exit](#) [Continue](#)

Send Campaign to Newly Added Student(s):

Navigate to the **Verify and Start** tab by clicking **Continue** or by using the link near the top of the screen. You will see a new notification at the top of the screen.

[✓ Define Campaign](#) — [✓ Verify Recipients](#) — [✓ Select Staff](#) — [✓ Compose Nudges](#) — [✓ Verify and Start](#)

ⓘ Some newly added students in this campaign have not received a nudge yet
You can send a nudge to them now with the **Send Nudge Now** button below or Save and Exit the campaign without sending these users an initial nudge. **All students apart of this campaign will receive future nudge emails.**

Verify & Start



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Click **Send Nudge Now** located in the bottom right corner.

Save and Exit

Send Nudge Now

A pop-up box will appear displaying your Welcome Message. Edit as needed and be sure to check that any original attachments are still attached. Click **Send to Added Students**.


Compose Nudge Email for Newly Added Students

{Schedule_link}
Thank you!

Available Merge Tags ⓘ

{student_name}	Inserts the first name and last name of the student
{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{Schedule_link}	Inserts a link to schedule the appointment

Add Attachment:

 No file chosen

Cancel

Students will receive future dated nudge emails until they successfully schedule their appointment. Keep this in mind as you create your nudge emails, as recently added students may receive a later nudge (example: nudge #4) as their first one depending on when they are added to the campaign. For New Student Appointments, we recommend only using the initial nudge and using the Send a Message feature for any follow up communication.



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Checking in a Student/Documenting a Student Appointment – Before Appointment Begins

From the Staff Home page, click on the **Appointments** tab. Check the box next to the name of the student you wish to check in/document under the **Upcoming Appointments** section.

Staff Home ▾

Student **Appointments** My Availability Appointment Queues Appointment Requests

Upcoming Appointments

Care Unit: All care units ▾

Actions ▾		DATE	ATTENDEE	TIME	SERVICE	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	1/1	08/13/2019 10:00a - 10:30a	Student, Imogene	10:00a-10:30a	Academic Concerns		Not Yet.	Details

Click **Actions** and choose **Add Appointment Summary**.

Upcoming Appointments

Care Unit: All care units ▾

Actions ▾

- Send Message
- Add Appointment Summary
- Issue Alert
- Cancel Appointment

Document the appointment.

APPOINTMENT REPORT FOR IMOGENE STUDENT

Appointment Details

Appointment
08/13/2019 10:00a-10:30a - Academic Concerns ▾

Care Unit
Academic Advising ▾

Location
Aero & Astro Engineering (ARMS 2000) ▾

Service
 Academic Concerns

Course
Start typing to search all courses ▾

Date of visit
08/13/2019

Meeting Start Time
10:00am

Meeting End Time
to 10:30am

Appointment Summary

B I Paragraph

P

All appointment details are pre-populated from when the appointment was created.

Fill in your notes here.



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Checking in a Student/Documenting a Student Appointment – At the Time of the Appointment/After Appointment has Ended

From the Staff Home page, click on the **Appointments** tab. Check the box next to the name of the student you wish to check in/document under the **Recent Appointments** section.

Staff Home ▾

Students Appointments My Availability Appointment Queues

Recent Appointments

Care Unit: All care units

Actions	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
<input checked="" type="checkbox"/>	Academic Concerns	N/A		Student, Imogene	30 min	Not Yet.	Details

Click **Actions** and choose **Add Appointment Summary**.

Recent Appointments

Care Unit: All care units

Actions ▾

- Add Appointment Summary
- Mark No-Show
- Issue Alert

Document the appointment.

APPOINTMENT REPORT FOR IMOGENE STUDENT

Appointment Details

Appointment: 08/13/2019 10:00a-10:30a - Academic Concerns

Care Unit: Academic Advising

Location: Aero & Astro Engineering (ARMS 2000)

Service: Academic Concerns

Course: Start typing to search all courses

Date of visit: 08/13/2019

Meeting Start Time: 10:00am to Meeting End Time: 10:30am

Appointment Summary

B I [List Icon] [Link Icon] Paragraph

Fill in your notes here.

All appointment details are pre-populated from when the appointment was created.

Fill in your notes here.



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Frequently Asked Questions (FAQs)

Q: Can incoming students use the self-service scheduling feature in BoilerConnect or do I have to use an Appointment Campaign?

A: Students will not be able to use the self-service scheduling feature in BoilerConnect for their New Student Appointment. Appointment Campaigns are the recommended method for scheduling New Student Appointments. A few non-advising units that are open to all students are set up so that students can use the self-service scheduling feature.

Q: We do not normally assign advisors until just before the fall term begins. Do we have to assign advisors prior to students having their New Student Appointments?

A: No. By using the Appointment Campaign feature in BoilerConnect, students do not have to be assigned to an advisor in order to schedule an appointment. NOTE: advisors will not be able to use the "My Students" search filter in UniTime or see if students are not assigned to them. Advisors will still be able to look up students individually in UniTime.

Q: When do students become visible in BoilerConnect?

A: Students appear in BoilerConnect the day after a Banner record is created for them. This occurs after the students accepts their offer of admission and deposits.

Q: Are advisors expected to hold video call advising appointments with international students?

A: Yes, if at all possible. We understand time zones cause scheduling challenges. While video calls are the preferred method of communication, it is understood this is not always possible.

Q. When do my appointments campaigns need to be created by?

A: Appointment campaigns should be created and ready for students to be added beginning May 3, 2022 regardless of when advising appointments actually begin.

Q: I am away from the office for a few days, am I expected to add students to my campaigns daily even if I am not working?

A: No. If you will be out for multiple business days, please arrange to have a colleague add your new students to your campaign for you. Instructions on how to do this are included in the Appointment Campaign Creation documentation.

Q: Can another advisor or our administrative assistant create and add students to a campaign for me?

A: Yes, as long as that individual has an Advisor/Coach role or higher in BoilerConnect. In the step where staff is added to the campaign, they will choose your name instead of their own.

Q: Why is there so much central oversight on the appointment services we use and the timing of summary report completion?



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A: During Purdue All Aboard, University Undergraduate Academic Advising (UUAA) and Teaching & Learning Strategic Initiatives collaborate to provide weekly Purdue 101 completion data to the Office of the Provost. To ensure the data is as accurate as possible, consistency is critical.

Q: How do time zones work for students scheduling appointments from home?

A: When a student is choosing a time/date for their appointment, the times shown are based on the local time zone of their internet browser/current location. All email and text message reminder notifications sent to the student prior to the appointment will show times reflective of the time zone of Purdue University – West Lafayette (Eastern Daylight Time).

Q: Who do I contact for help with BoilerConnect specifically?

A: Your [Department Trainer](#) or boilerconnect@purdue.edu

Sample Campaign Message

STUDENT FIRST NAME,

Hello and welcome to DEPARTMENT NAME!

My name is ADVISOR NAME and I am an ACADEMIC ADVISOR (OR OTHER ROLE) for the Department of DEPARTMENT NAME in the College of COLLEGE NAME. Thank you for completing Purdue 101! It's now time to create your 1-on-1 Academic Advising appointment to discuss and complete pre-registration for fall 2022 courses. Please use this link (BOILERCONNECT CAMPAIGN-GENERATED LINK) to schedule your appointment with me between YOUR ADVISING DATES.

Prior to your advising appointment, please be sure to complete the following so I can best advise you during our appointment:

- [ALEKS Math Placement Test](#)
- [myCareerPlan](#)
- Request any AP scores and/or official college transcripts to be sent to [Purdue Admissions](#). If you have taken dual credit courses at Purdue Fort Wayne or Purdue Northwest these courses will already be on your transcript and do not need to be submitted. Please also have a list of any AP/Dual Credit coursework with you during your advising appointment.

I look forward to meeting you soon. If you have any questions prior to our appointment, please email me at EMAIL ADDRESS or call PHONE NUMBER.

Boiler Up!

ADVISOR NAME