

# Navigate Creating a Progress Report Campaign

## About Progress Report Campaigns

Progress Report Campaigns allow you to gather feedback from faculty to help determine which students may need intervention. To get started, click on the **Progress Report Campaigns** tab. Then under Actions – **I want to create a new...** click on **Progress Report Campaigns**.

## Create a Progress Report Campaign

### Step 1: Name & Message

To create a progress report campaign, fill out the following fields:

1. **Name of Campaign:** the name of the campaign; make sure its descriptive enough for you to be able to revisit for analytics
2. **Email Subject:** the subject of the email that the faculty will receive
3. **Email Message:** this is where you will define the body of the email that will be sent to your professors. A brief message summarizing what you are asking your professors to do is usually best. It is always a good idea to give your professors a “heads up” notification/email so they know exactly what a progress report is and what your expectations are.

### Progress Reports

- Step 1 : Name & Message  
Name your Progress Report Campaign, and provide a message for professors.
- Step 2 : Choose Students  
Choose all-students, subset of students, or classes that are to be monitored.
- Step 3 : Define Behavior  
Define how your Progress Report will behave with thank you notes and expiration dates.
- Step 4 : Confirm  
Confirm the students enrollments which are the target of the Progress Report campaign.
- Step 5 : Send & Complete  
Your Progress Report Campaign has been sent to instructors.

### Create New

**Name of Campaign**

**Email Subject**

**Email Message**

Dear Professor,

Please take a few minutes to fill out progress reports for the students in your class. The feedback you give us will be used to help identify those students who may be in need of extra help.

Your help is very much appreciated.

Regards,

Provost Joe Smith

[Save and Next : Choose Students](#)

## Step 2: Choose Students or Courses

Choosing which students/course sections that will be included in your progress report campaign is perhaps the most important step of the creation process. You can select specific groups of students or entire cohorts.

Options available are described below:

1. **All Students Active for the Academic Term:** This should be used when sending a progress report campaign for all students. This option is best used if you wish to send a campaign for all students that are enrolled in the current term.
2. **Select Specific Students and Courses (<2000 students):** Use this to send to a selective group; for example, all students on the football or Women's Tennis team.
  - a. When you click this option, the bottom half of the page opens up giving you a filter for both students and classes:
    - i. **Filter Students:** In the Filter Students section, you can select students by criteria.
    - ii. **Filter Course Sections:** You can use the Course Sections filter either independently of, or in conjunction with, the Student filter. For example, I could choose to run my campaign for only Math courses for my Football and Women's Tennis students. I would just need to search for and select all the Math courses and then click the Next: Define Behavior button.
      1. When using the Course Section filter in conjunction with the Student filter, we have a checkbox option called **Only show courses for the above selected students**. When checked, this option will only display courses that are currently being taken by your selected students. Users could then select only Math courses for the student athletes in the campaign. Narrowing down the course list this way is a lot easier than searching your entire course catalog for all Math courses.
      2. The course filter can be used independently of the student filter to create a campaign for ANY student in certain courses. To do this, do not select ANY students via the student filter and only search for and select the appropriate courses via the Course Section filter.
    - iii. Once all of your students and courses have been selected, click the **Next: Define Behavior** button to move to the next step.
3. **Select Cohorts of Students and Courses (>2000 students):** This option should be used when sending a campaign for a selective group (or cohort) greater than 2000 students. For example, all freshman and sophomores. Checking this option opens up the a Search Filter.

**How would you like to select which students receive progress reports?** The following 3 selection methods offer the power to drill down into a particular student/class or scale to the entire campus:

- All Students Active for Academic Term** : Send requests for all students active for the Spring 2014 term. This includes all students who are active in their courses (i.e. not dropped). This will include everyone in your GradesFirst environment, and **is not** restricted by any requirement other than academic term.
- Select Specific Students and Courses (< 2000 students)** : Send requests for specific students filterable by any condition within GradesFirst. You can also choose to send to specific course sections. By choosing both a list of students and a list of courses, you can select specific students in a specific course.
- Select Cohorts of Students and Courses (> 2000 students)** : Send requests to cohorts of students filterable by any condition. Differs from the "Specific Students" above since you will not choose specific students or specific courses. In the "Confirm" stage, you will see a sample of students and courses you chose.

## Step 3: Define Behavior

Here, you can define parameters around this campaign to help prevent professors from being sent multiple campaign emails to when the campaign should expire and whether the professors should receive a "Thank you" email when they complete their evaluations.

Complete the following details:

1. **Exclude Students Requested Since:** This date is used to ensure duplicate progress report requests are not sent to the same professors for the same students in the event a second campaign is sent.
  - a. For example, a progress report is created and sent on 11/1, and you upload your latest schedule changes on 11/5, therefore adding (and removing) students to classes. With an updated roster, you may want to send out another progress report campaign to ensure those newly added students are also evaluated. In theory, you would not want the professors to have to re-evaluate all students again. So this allows you to exclude those students already evaluated from appearing in this second campaign.
  - b. All that needs to be done, in this example, is when you create your second campaign, enter the date 11/1, which tells Navigate to exclude the students who have already been evaluated from the professors list.
2. **Expire Professor Links On:** This is the progress report campaign expiration date. Select the date you wish for any unfilled professor evaluations to expire on. If a professor tries to access the campaign after that date, they will be notified that the “link has expired.”
3. **Send Thank You Message to Instructors upon Completion?:** you can customize the message the instructors will receive.

## Progress Reports

### Progress Report for Fall

[Edit](#)

**Step 1 : Name & Message**

Name your Progress Report Campaign, and provide a message for professors.

**Step 2 : Choose Students**

Choose all-students, subset of students, or classes that are to be monitored.

**Step 3 : Define Behavior**

Define how your Progress Report will behave with thank you notes and expiration dates.

**Step 4 : Confirm**

Confirm the students enrollments which are the target of the Progress Report campaign.

**Step 5 : Send & Complete**

Your Progress Report Campaign has been sent to instructors.

**Exclude Students Requested Since**

Prevent new student requests from being sent to professors who have already received a request since the below date.

09/18/2015 

**Expire Professor Links On**

Prevent professors from responding to the campaign after the below date.

11/27/2015 

Send Thank You Message to Instructors upon completion?

Back : Choose Students    Next : Confirm

## Step 4: Confirm

This final page will give you a detailed count of how many students, professors and course sections will be included in your campaign. Also, a complete list of your included students will also be displayed.

**Step 1 : Name & Message**

Name your Progress Report Campaign, and provide a message for professors.

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**Step 2 : Choose Students**

Choose all-students, subset of students, or classes that are to be monitored.

---

**Step 3 : Define Behavior**

Define how your Progress Report will behave with thank you notes and expiration dates.

---

**Step 4 : Confirm**

Confirm the students enrollments which are the target of the Progress Report campaign.

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**Step 5 : Send & Complete**

Your Progress Report Campaign has been sent to instructors.

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**Cancel?**

[Delete this unsent campaign.](#)

Based on your student selection(s), the application will send 69 evaluation requests for 11 students in 16 sections to 40 professors. Below is a list of all the evaluation requests that will be sent. Please review this list to ensure all desired students and courses are included.

### Evaluation Requests To Be Sent

	STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
1	E				DESCRIPTIVE ASTRONOMY IA	1
2	J				ORGANIC CHEMISTRY LAB I	1
3	J				GLOBAL ISSUES	1
4	J				ORGANIC CHEMISTRY I	1
5	J				PRINCIPLES OF BIOLOGY II	1
6	J				LEADERSHIP & TEAMWORK	1
7	S				NATURAL HIST-S CAROLINA	J655
8	L				INTRO TO THE BIOL SCIENCES	1
9	L				SURVEY OF WORLD HIST TO 1500	1
10	L				INTRODUCTORY PHYSICS I	1
11	L				PRINCIPLES OF BIOLOGY II	1

## Campaign Status Update Email

When a campaign is created and issued out, the campaign creator will receive an email notifying them of the status of the campaign. It'll contain the name of the campaign and how many staff it was sent out to.

# University Of The Incarnate Word

## Evaluation campaign status update

**Campaign Name**  
Test/Sample Campaign

**Status**  
You have successfully requested progress reports from 11 professors.

Contact for Undergraduate Main Campus academic advising: University Advising Center: 210-805-5814, [advising@uiwtx.edu](mailto:advising@uiwtx.edu).

School of Professional Studies Students Contact for Academic Advising: 210-702-2402.

Contacts for tutoring: Writing and Learning Center/Tutoring Services: 210-829-3870. Cancellation guidelines: [www.uiw.edu/wlc/writing-consultations](http://www.uiw.edu/wlc/writing-consultations).

## Faculty View

### Email Recieved by Faculty

## Student Feedback Request

Professor's last name will auto-populate

Dear Professor Ha,

Custom body text included in email (the **Email Subject** field filled out when building the Progress Report campaign)

This is the message I'm including for the campaign.

[Click to Begin Entering Student Feedback](#)

The link above expires on 01/11/2021. If you would like to provide feedback after the expiration above, please contact your administrator.

The date the link expires is customized when building campaign.

If you have trouble with the above link, copy and paste this address into your browser:

[https://](#) //

Global footer that appears in every email sent from Navigate platform.

Contact for Undergraduate Main Campus academic advising: University Advising Center: 210-805-5814, [advising@uiwtx.edu](mailto:advising@uiwtx.edu).

School of Professional Studies Students Contact for Academic Advising: 210-702-2402.

Contacts for tutoring: Writing and Learning Center/Tutoring Services: 210-829-3870. Cancellation guidelines: [www.uiw.edu/wlc/writing-consultations](http://www.uiw.edu/wlc/writing-consultations).



## Access the Student Feedback Form

When the faculty clicks on the link provided in the email, they will be required to log in to Navigate.

If the faculty already had an active Navigate session open, they will get an alert on their Professor Home showing they have a progress report to fill out, as follows:

### Professor Home ▾

**R** ██████████ please respond to the following progress report request(s):

- Mar ██████████ would like you to complete 1 progress report(s) by **Monday, January 11, 2021** [Fill Out Progress Reports](#)

### Class Listing

CLASS NAME	TIME	ROOM	
(PHAR-3170) Introduction to Pharmacy	T 1:00p-2:00p CT	FSOP-513	<a href="#">Assignments</a> <a href="#">Progress Reports</a>

### Actions

I want to...  
[Issue an Alert](#)

### Quick Links

The faculty can then visit the progress report feedback form via the email link provided, or the link shown in their Professor Home. When clicked they will see the following feedback form:

# Student Feedback



**Your information is secure.**  
Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.  
Thank you!

## Professor A

You have been asked to fill out progress reports for students in the following classes. Update each student based on your best knowledge of their performance at this point in the term.

PHAR-3170-55605-A Introduction To Pharmacy

Student Name	At-Risk to Fail Your Class?	Alert Reasons (You must choose at-least one if the student is at risk)	How Many Absences?	Current Grade	Comments
1 A	<input type="radio"/> Yes <input type="radio"/> No	Alert Reasons			

Submit only marked students (but I'm not done)

This button will submit students you have marked as being complete (effectively removing them from your list of students). However, the students you have not marked will remain on your list. As a result, you can re-use the link in the progress report email, at any time, to continue marking the rest of the students in your classes. Repeat this process until all students have been marked in some form or fashion.

Submit unmarked students as not At-Risk (I'm all done)

This is your "I'm all done" button. It will submit the students you have marked as you indicated. It will also submit the rest of your students as not at-risk. For example, if there are ten students in your course and only two of them are at-risk, you don't have to mark them all. You can mark the two at-risk students and then use this button to mark the remaining students as not at-risk, therefore saving time and effort. Please use this button carefully because with just a single click, it will totally complete your progress report campaign.

## Submit Reports

As a tip, fill out the records of students who are at-risk or you have some comments to make about the student. Afterwards, click on the **Submit only marked students (but I'm not done)** button. The students' reports will be submitted and their records will be removed from the list.

Now, for all of those students who you don't have any concerns or feedback for, you can click on the **Submit unmarked students as not At-Risk (I'm all done)**. This is a quick way to complete your task of submitting your reports at once.

## Complete all Progress Reports

When complete, the faculty will see the following screen:

### Student Feedback



**Your information is secure.**  
Security measures allow your school to adhere to government rules and regulations concerning FERPA and overall student privacy.  
Thank you!

#### You completed your Student Feedback; the progress reports are being saved.

Saving the progress reports can take up to a few minutes (if there are many reports to save). You will receive a follow-up email if there were any errors saving the progress reports.

If you have any remaining progress reports to complete, you can return to the progress report page from the banner link on your home page.

Go Home

## View Submitted Reports

The faculty has access to view the progress reports that were submitted by accessing the Professor Home, then clicking on the **Progress Reports** link for a given class:

### Class Listing

CLASS NAME	TIME	ROOM	
(PHAR-3170) Introduction to Pharmacy	T 1:00p-2:00p CT	FSOP-513	<a href="#">Assignments</a> <a href="#">Progress Reports</a>
(PHAR-5185) Geriatric Phar/Perspect in Agi	M 4:00p-7:00p CT	FSOP-478	<a href="#">Assignments</a> <a href="#">Progress Reports</a>
(PHAR-6450) LAU Comm Care Adv Phar Prac Ex	MTWRF 8:00a-5:00p CT	Not Specified	<a href="#">Assignments</a> <a href="#">Progress Reports</a>

When clicking on the **Progress Reports** link, the faculty will see submitted reports, and have the option to submit adhoc progress reports on a student or several students on the section below.

### Progress Reports for PHAR-3170(Introduction to Pharmacy)

STUDENT NAME	AT RISK?	ALERT REASONS	ABSENCES	EXPECTED	COMMENTS	CREATED AT	
[Redacted]	No					11/12/2020	<a href="#">Details</a>

**Class Information**

**Name:**  
PHAR-3170 – Introduction to Pharmacy

**Class Days:**  
F 1:00p-2:00p CT

**Hours:**  
1.0

**Professor(s):**  
[Redacted]

Use The Checkboxes To Select Students From Your Classes And Then Click The "Create A New Progress Report" Option From The Actions Dropdown To Begin Adding A New Progress Report.

Actions ▾			
<input type="checkbox"/>	STUDENT NAME	PHONE NUMBER	EMAIL ADDRESS
<input type="checkbox"/>	A [Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	A [Redacted]	[Redacted]	[Redacted]
<input type="checkbox"/>	A [Redacted]	[Redacted]	[Redacted]

The faculty can click on the **Details** link in the submitted progress reports section to view the details of the progress report for that specific student:

**PROGRESS REPORT DETAILS** [Close]

At-Risk to Fail Your Class?  Yes  No

Alert Reasons (You must choose at-least one if the student is at risk)

How Many Absences?

Current Grade

Comments



## Additional Resources

Navigate Help Center: <https://support.gradesfirst.com/hc/en-us>