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# Launching a Progress Report Campaign



Help Center Manager

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**Intro:** This workflow guide covers how to create and launch a Progress Report Campaign.

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## Progress Report Campaigns and Navigate

Progress Reports allow your institution to gather feedback on student performance and identify potential barriers to success. Progress Reports proactively request feedback from faculty and strategic questions should also be used when trying to launch them, such as:

- How would you like your early alert process to change? Who should be accountable for following up on alerts submitted by faculty and staff?

- Progress Reports: who should initiate campaigns? Will this replace any existing process? What expectations do you have of faculty?
- General Case Management: should each alert reason initiate a case? Write our process workflow by each reason? Who owns follow up? Who should receive communication?

## Launching a Progress Report Campaign

Progress Report Campaigns allow you to gather feedback from faculty to help determine which students may need intervention.

To begin, open the **Campaigns** page and select **Progress Report Campaign** from the Actions panel.

The screenshot displays the 'Spring Semester 2019 Campaigns' interface. At the top, there are tabs for 'Progress Report Campaigns', 'Enrollment Censuses', 'Appointment Campaigns', and 'Travel Letters'. The main content area lists several campaigns, each with a status indicator (e.g., '3 of 5 steps complete') and progress bars for 'Response' and 'At-Risk'. The 'Actions' panel on the right is titled 'I want to create a new...' and lists four options: 'Progress Report Campaign' (highlighted with a red box), 'Enrollment Census Campaign', 'Appointment Campaign', and 'Travel Letter'.

### Name & Message

The first step is to name your campaign, define the subject of your email, and write your message. We have listed the fields to fill out below.

## Progress Reports > Create New

**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.

**Name of Campaign**

**Email Subject**

**Email Message**

**B** *I* Paragraph ↶ ↷

[Save and Next : Choose Students](#)

### Name of Campaign

The name of your campaign. It will be visible on the Campaign tab.

### Email Subject

The subject of the email that is sent to your faculty requesting them to fill out the Progress Report campaign.

### Email Message

This field is where you write the message that will be sent to your faculty. We recommend a brief message summarizing what you are asking them to do. It is also a good idea to give your faculty a “heads up” notification/email so they know exactly what a progress report is and what your expectations are.

## Choose Students or Courses

Choosing which students/course sections to include in the progress report campaign is critical for campaign success. You can select specific groups of students or entire cohorts as defined below.

**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.

## Potential Selections

### All Students Active for Academic Term

This option creates a progress report campaign for all students enrolled in the active term.

### Select Specific Students and Courses (<2000 students)

This option should be used when sending a progress report campaign for a selective group (or cohort) of less than 2000 students. Examples of a group include all students on the Men's Football or Women's Tennis team.

When you click this option, the bottom half of the page opens up giving you a filter for both students and classes.

In the Filter Students section, you can find students based on a simple keyword search OR use Advanced Search features. You may also use a saved search.

You can ALSO use the Course Sections filter either independently of, or in conjunction with, the Student filter. For example, you may want progress reports from only Math courses for your Football and Women's Tennis students. Search for and select all the Math courses and then click the **Next: Define Behavior** button.

When using the Course Section filter in conjunction with the Student filter, use the option **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.

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.

Users can also filter by Section Tags. A Section Tag is an optional identifier if there is a need to distinguish between the types of course section (ex. Lab, Lecture or various sessions within a term – 3 week, 5 week, and 8 week). These can be generated and imported directly from your institution's SIS.

Once all of your students and courses have been selected, click the **Next: Define Behavior** button to move to the next step.

### Select Cohorts of Students and Courses (>2000 students)

This is the third method of selecting which students should be included in your progress report campaign. 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 filters shown below.

From here, follow the same steps as in the specific students and courses instructions.

## Define Behavior

This step sets administrative options for the campaign.


Progress Reports > S21 Progress Reports > Edit

**Step 1 : Name & Message**

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

Exclude Students Requested Since

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


11/29/2020 

**Step 2 : Choose Students**

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

Expire Professor Links On

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

12/19/2020 

**Step 3 : Define Behavior**




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

Send Thank You Message to Instructors upon completion?

Thank You Subject

Thank You For Submitting Your Progress Report

Thank You Email Message

**B** *I*    Paragraph ↶ ↷

Thank you for submitting your progress reports. This will assist our students, and empower student support services to better serve them in the days to come.

**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.

**Cancel?**

Delete this unsent campaign.

[Back : Choose Students](#) [Next : Confirm](#)

### 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. For example, if 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 in Navigate, 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 to prevent this, we have the ability to exclude those students already evaluated from appearing in this second campaign. All that needs to be done, in this example, is when you create your second campaign, enter the date of 11/1, which tells Navigate to exclude the students who have already been evaluated from the professors list.

### Expire Professor Links On

This is essentially your progress report campaign expiration date. Select the date you want any unfiled 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*.

### Send Thank You Message to Instructors upon Completion?

Select this option if you want to automatically send a “thank you” email to each professor that completes their evaluations. When checking this box, you will be able to define both the subject and message of the email. And as each professor completes their evaluations, they will automatically receive your thank you email.

Click **Next: Confirm** to move to the next step.

## Confirm

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

Progress Reports > Writing 2 Progress > Edit

**Step 1 : Name & Message**  
Name your Progress Report Campaign, and provide a message for professors.

Based on your student selection(s), the application will send 1 evaluation requests for 1 students in 1 sections to 1 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.

**Step 2 : Choose Students**  
Choose all-students, subset of students, or classes that are to be monitored.

**Evaluation Requests To Be Sent**

INDEX	STUDENT	ID	PROFESSOR	COURSE	COURSE NAME	SECTION
1	Hirsi Kutuma	076983830	Ashlee Demastus	ANTH-1102	INTRO TO ANTHROPOLOGY	009

**Step 3 : Define Behavior**  
Define how your Progress Report will behave with thank you notes and expiration dates.

You **have not** selected to send a follow up thank you E-mail to professors.

**Step 4 : Confirm**  
Confirm the students enrollments which are the target of the Progress Report campaign.

Back : Define Behavior    Next : Send & Complete

The summary at the top details exactly how many students, course sections, and professors that are included in your campaign.

### Evaluation Requests to be Sent

Shows the list of students who are to be included in your campaign.

### What happens if I don't see any students in my list?

Depending on how large your campaign is, the **Evaluation Requests To Be Sent** table may populate instantaneously or it may take several hours. But in either case, you cannot click **Next: Send & Complete** until your students populate in this grid. If this process takes a while, you do not have to wait on this page while your campaign is being built. Users can continue using the site when your list and do other things in Navigate.

Once everything looks good, click the **Next: Send & Complete** button to complete and send your progress report campaign.

## Related Articles

- [Campaigns: Progress Report Campaigns](#)
- [Progress Report Administration](#)
- [Responding to Progress Report Requests](#)