Clarivate

campusM Playbook

CUSTOMER V1.3.3 – updated 04 Aug 2026

The campusM playbook was created to help customers effectively deploy and use campusM in a number of common scenarios. For each scenario, it details the goals for using campusM in that scenario, lists the campusM features that can be used to achieve those goals, and provides examples.

Contents

Contents **1**

Introduction to the Playbook *3*

Introducing campusM *3*
Value Proposition 4

The Open Day **6**

Overview *6*

Personalization *7*
Option 1 – Separate Profiles 7
Option 2 – Quick Polls & Roles 8

General Information and Communication *8*
Static Content Pages 9
FAQs Using List Product Integration 9
Notifications and Alerts 10

Navigating the Open Day *10*
Maps 10
Events & Timetable Product Integrations 11

After the Open Day *12*
Explicit Feedback – Quick Polls and the Feedback feature 12
Implicit Feedback – Analytics 13
How do I apply? – List / Task Board Product Integration 13

Welcome Week **14**

Overview *14*

Adoption Strategy *15*
Marketing the App 15
Other Incentives 16

Personalization *16*
Profiles 16
Roles and RoleSync 17

Tags *17*

Socialization *18*
Events PI 18
Gamification Ideas 19

Orientation and Onboarding *19*
LMS/VLE PIs 19
Library PIs 20
IT Onboarding 20
Maps 21
Timetable PI 22
Task Board and List PI 22

Information & Comms *23*
Banner/Feeds Tiles 23
Notifications and Alerts 24
FAQs Using List Product Integration 24
Important Contacts using the My Advisor PI 25

Feedback *25*
Explicit Feedback – Quick Polls and the Feedback feature 25
Implicit Feedback – Analytics 25

Playbook Scenario – Current/Continuing Student **27**

Overview *27*
Introduction 27
Goals 27

Feature Focus *28*

Playbook Scenario – Alumni **36**

Overview *36*
Introduction 36
Goals 36

Feature Focus *36*

Notifications & Alerts **41**

Overview *41*

Push Notifications, Alerts, Reminders – What's the Difference? *42*

Methods of Sending Notifications *42*
Notification Center 42
New User Registration Campaign 42
BCC Email Notifications 43
API Notifications 43

Grouping and Targeting *43*
An Individual/A List of Individuals 43
Notification Groups/Channels 44
Roles 44
"All users" groups 44

Best Practices for Group Notifications *45*
Target Your Message 45
Title Composition 46
Quality Gatekeeping 46
Performance Benchmarks 47
Focus on What Matters 47

About Clarivate **48**

Introduction to the Playbook

The campusM playbook is designed to guide institutions in effectively using and deploying campusM. It is divided into scenarios that reflect a typical student's progress through the stages of their academic career. Each scenario provides suggestions for how campusM can be optimally deployed, and includes discussions about the goals, the features that can be used to achieve them, and examples of use cases.

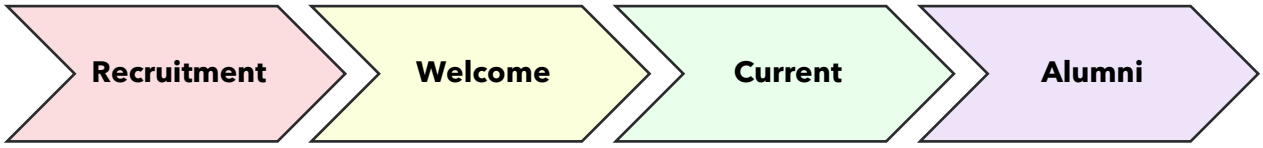


Figure 1 Scenarios: Stages of Students' Academic Careers

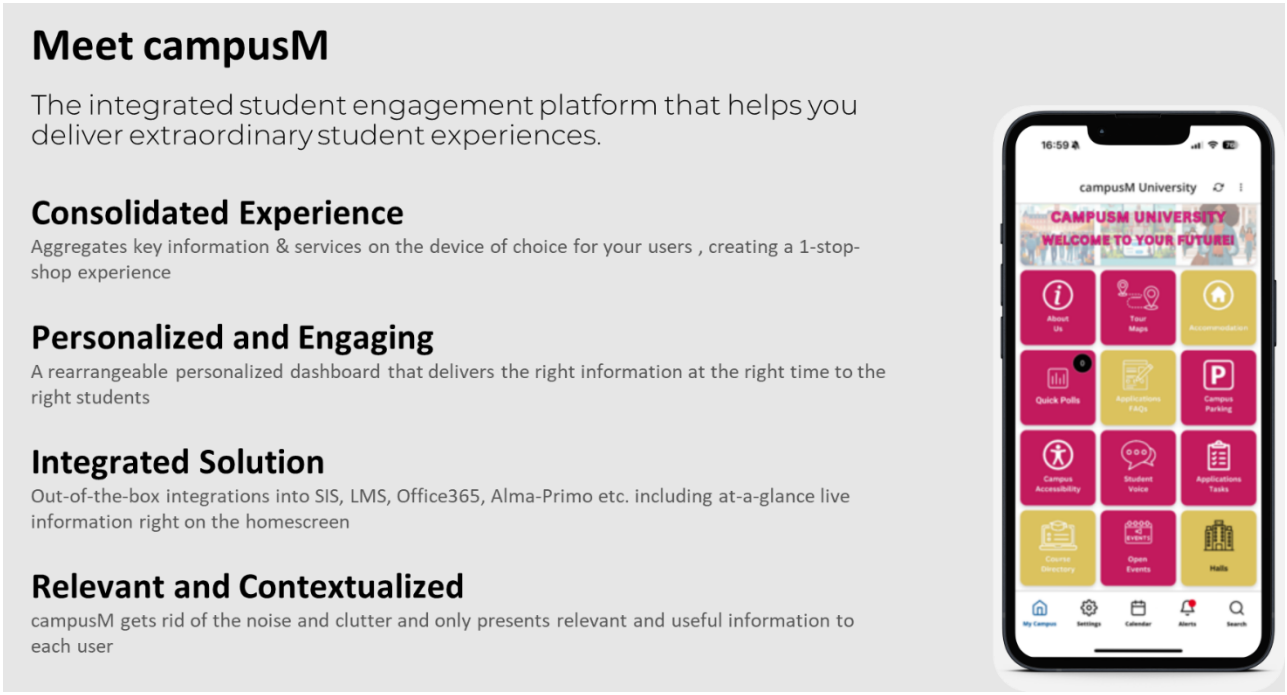
The following is a general overview of these stages and the potential roles campusM can play in them:

Journey Stage	Stage Description	Goals	campusM Feature Highlights
Prospective Student	A space for prospective students to engage with digital services and use them as a guide through the application process	Engage prospects, build a relationship, and showcase institutional strengths	▪ Profile & Tags ▪ Notification Campaign ▪ Recruitment Events Directory ▪ FAQs for application ▪ Accommodation Content Pages ▪ Marketing Banners & Social Media Feeds ▪ Application Task Board
Welcome/ Orientation	Help new students transition to the institution and feel supported	Guide students through the initial weeks, reduce stress, and ensure retention	▪ Welcome Events Directory ▪ New Student FAQs ▪ International Student Hub ▪ Campus Maps ▪ Registration Task Board ▪ Digital ID Card ▪ Personalized Feedback and Polls
Current/ Continuing Student	Offer continuous support to students during their studies, including daily logistics, engagement, attendance, information, service delivery, and communication	Boost student engagement, academic success, administrative efficiency, personalized digital experiences, communication, and well-being through personalized features, LMS integration, streamlined tasks, unified communication, and wellness resources	▪ Unified Calendar ▪ Attendance Capture ▪ Library Services ▪ LMS ▪ Digital ID Card ▪ Room Booking ▪ Email ▪ Task Board ▪ Campus Maps ▪ Student FAQs
Alumni	Keep graduates connected and provide career and fundraising opportunities	Maintain relationships, assist in career growth, and encourage donations	▪ Profile & Tags ▪ Upsell Course Directory ▪ Alumni Events Directory ▪ Career Outcome Polls ▪ Careers Support

Introducing campusM

campusM is an all-inclusive resource for students and staff to interact with an institution digitally, all in one place and on their device of choice, wherever they are and whenever they need to use it.

campusM creates a single windowpane to the systems that students need and the information they want to access at all stages of their academic journeys. Its rich, integrated feature-set delivers a personalized and contextualized experience that is designed to both engage and inform. Whether students are looking to find out when and where their next class is, locate a learning resource in their learning management systems or library, or just see what's on the menu in the local canteen, campusM has them covered.



campusM was developed with the express purpose of supporting students and helping them succeed. In the complex environment of the modern student experience, campusM creates a single point of entry for students to access services and information, on their mobile devices or on the web. This creates a focused experience that helps them navigate the logistics of being a student – from prospect to alumnus.

Value Proposition

Students comprise the largest group of stakeholders within a university or college, and from a business perspective, universities have a vested interest in catering to their expectations regarding digital resources. With smartphones cited by an IBM study as the device of choice for 75% of Gen Z'ers, offering a modern, useful campus app experience is now a must for both recruitment and retention purposes.

campusM is designed to enable universities to build engaging mobile apps and web portals that make it easier for students to navigate through and successfully complete their academic journeys. By providing students with a single access point for digital university services and resources, with an intuitive, consistent, and effortless user experience, campusM helps universities clear barriers to graduation and helps students focus on what matters to them most.

campusM can also help universities support their core educational mission: to teach, reach, inspire, and support all students. Integrations with core teaching and learning systems, such as library solutions, learning management systems, and student information systems, help students connect with peers and instructors and access information at the times they choose and on their own terms.

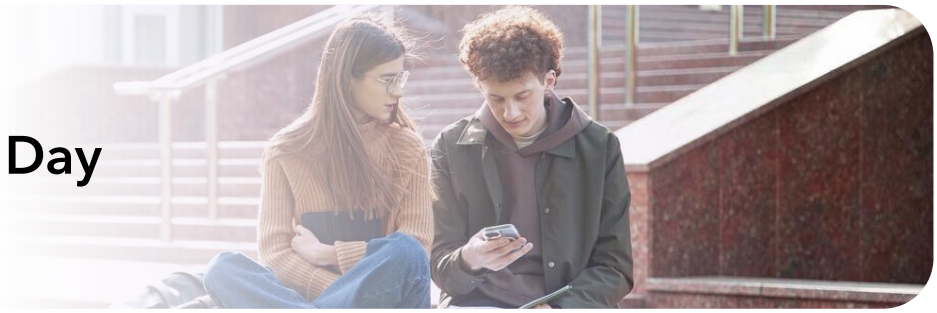
At the same time, administrators can use data from features like Quick Polls, Attendance, and app-tile access to create unique wellness dashboards for each student. Armed with this information, administrators and instructors can identify struggling students in real-time, offer them support, and get them back on track toward finishing their degrees.

Integrate: The app integrates with core university systems, including the Student Information System, Learning Management System (Virtual Learning Environment), Library Solutions, and more, to offer students a seamless digital experience across devices. campusM currently offers over 50 out-of-the-box integrations and enables universities to develop their own integrations using Application Extension Kits.

Engage: Using features like Quick Polls, Attendance, and Task Board to target granular student groups, from prospects to alumni, with personalized content and messaging, the app empowers admins to engage and communicate with students at scale.

Support: App user-data from Quick Polls, Attendance, and tile clicks allows administrators to build wellness profiles, identify struggling students, and offer support in real-time.

The Open Day



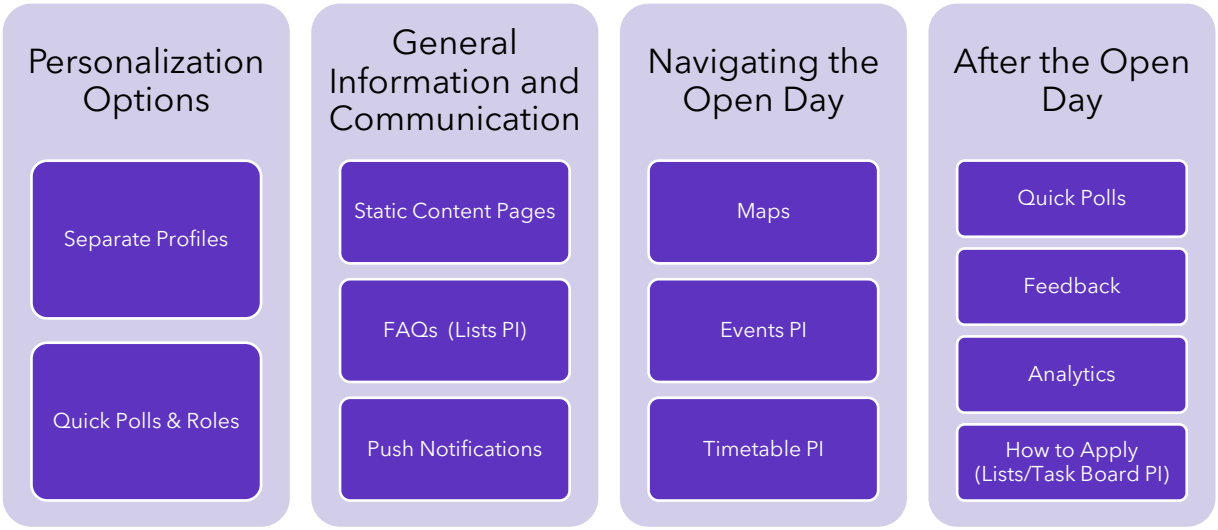
Overview

The Open Day Event is often the first interaction that a prospective student has with your institution – and we all know what they say about first impressions: you have to make them count! In this section we've gathered our best-practice recommendations to optimize your app so both your institution and your prospective students get the most you can from the Open Day Event.

Before we begin, let's stop for a moment and review the needs and wants of your institution – and of the prospective students!

*As an **institution** having an Open Day, my **goal** is...*	To provide easily accessible and clear information to prospects.
	To showcase my campus and my institution.
	To help people navigate confidently in unfamiliar surroundings and make the most of their day here.
	To motivate prospects choose this institution for Higher Education.
*As an **institution** having an Open Day, I want to **avoid**...*	Confusing people by providing too much information, conflicting information, or by overcomplicating the information's delivery.
	Technical issues, logistical issue and other frustrating factors.
	Leaving the prospective student with a negative experience.
*As a **prospective student** at an Open Day, my **goal** is...*	To see the area/city/campus - in order to understand what living here might fee like.
	To see the campus, talk to other prospects, current students and staff - in order to understand what stuying here might feel like.
	Navigate new surroundings confidently by having certainty ahead of time on when and where I need to be.
	Be able to navigate the open day successfully while being as social (or a-social) as I feel comfortable being.
*As a **prospective student** at an Open Day, I want to **avoid**...*	Navigation failures: getting lost, missing a session I wanted to go to, not undertsanding where and when I need to be.
	Negative emotional experience - feeling isolated, awkward, overwhelmed, unprepared, like an imposter, or culture shock.
	Not being able to find the information I need to make a decision on whether I should study here or not.

In this Open Day section, we've found four key areas of configuration that will determine your prospects' experience, and your outcomes:



Personalization

Prospective students are, almost by definition, not yet registered into any of your systems – and so in this section we will assume that there is no institutional login that they can use to authenticate into the app. This makes it hard to personalize their experience in any meaningful way and to get any data on the different preferences and behaviors of your user base. To facilitate personalization, we recommend using one of the following options (but you can also mix and match).

User Story

As a prospective student I want to only see information that's relevant to me so that I don't get overwhelmed.

As an institution I want to provide a personalized experience so that my prospects are not confused by irrelevant information.

Note: *As having some form of authentication is a prerequisite for many of the features listed in this chapter, the Open Day* ***Profile Group*** *should use the* ***"Standard Authentication"*** *option (and not the anonymous "No Authentication") in the Profile Registration Authentication page. This will require prospects to enter a first and last name, an email address, and their own password.*

Option 1 – Separate Profiles

Description: This option will suit institutions who have structured discrete open days, which don't vary too much on a personal level. Having several Open Day Profiles under one Profile group would allow to apply different branding for each profile if desired, and completely separate experiences for different prospects.

Usage Examples: The different profiles can be used for different departments, different dates, or academic paths. In this scenario, the student will open the app, choose the Open Day profile group, and then choose the Open Day profile that's relevant to them. Your prospects could then switch between these profiles at will.

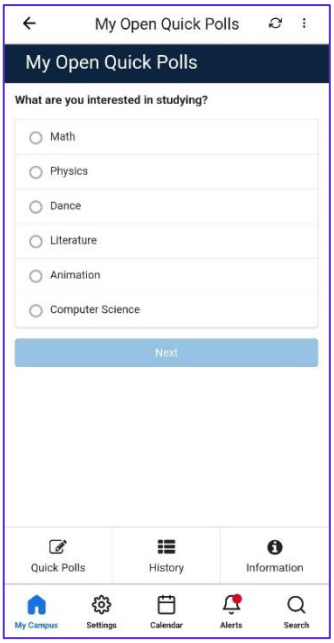
Pros & Cons: The main downside to using this option is that because the experiences are completely separated, many of the configurations are as well. Choosing this option might lead to a duplication of work as you configure each profile slightly differently. If not combined with

any of the options below, this does not provide much personalization, rather only a crude targeting.

Documentation on creating profiles can be found in our Knowledge Portal.

Option 2 – Quick Polls & Roles





Description: We usually think of Roles as an automated process, reserved for authenticated users, in which the administrator applies personalization to a user's experience based on what they already know about the users. But, using the power of Quick Polls (which are one-question surveys built into campusM), we can apply Roles to users based on their answers – and use those for user-driven personalization.

Usage Examples: The user will receive a notification that they have a Quick Poll waiting for them, and they will have a badge on the app icon in their mobile device's home screen and on the appropriate tile until they answer it. If the Quick Poll is configured as a multiple-choice question, the user's selection(s) can be configured to add a campusM app Role to their user. For example, the Quick Poll would ask which subjects the user is interested in studying, and the selection of each answer would expose the schedule of events for the relevant department.

Pros & Cons: Once the user has answered the Quick Poll, their app will be automatically updated with their new role, per your configurations – new tiles can appear, notifications can be sent, locations on the map can be revealed, Timetables can be added to the app calendar… This allows the user to expose the information that's relevant to them to avoid overwhelm and unnecessary noise. The main limitation to using Quick Polls in this way, is that while it provides you with the most functionality, these roles cannot be changed easily by the user if they regret their choice later on, as the Quick Poll Role, once applied, can only be changed by admin.

Documentation on Roles and setting up a Quick Poll can be found in our Knowledge Portal.

General Information and Communication

The average Open Day event contains a vast amount of information for prospective students to learn, process and base their decisions on. It's easy to understand why they would be overwhelmed and why communicating that information in a way that's succinct, targeted and accurate is of utmost importance.

User Story

As a prospective student I want to find information easily through the app so that I can make an informed decision about my studies.

As an institution I want to communicate effectively with prospects so that they engage more with the app and institution.

The features listed below are highly recommended to be used together with one of the personalization options described in the previous section as a way to make sure that prospects are receiving only the information they need, to limit confusion and mixed messaging.

Static Content Pages

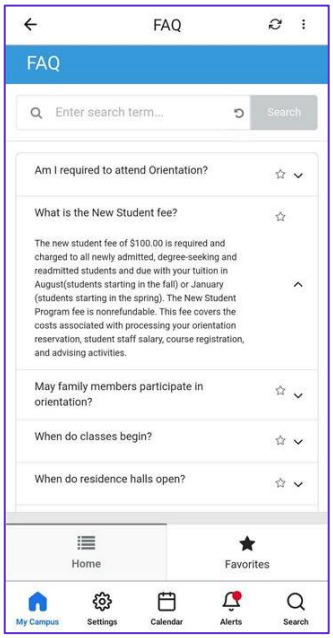
Description: Sometimes, the best solution is the simplest solution. In App Manager, you can use Creative Studio to build web pages with static content. These pages can contain whatever information you believe would be beneficial to the prospective students, to allow them to learn more about your institution and their potential academic paths. Using Content Pages with one of the personalization options listed in the previous section will ensure that students can easily browse the information that's relevant to them, without getting lost.

Usage Examples: Content Pages could contain almost anything you'd like them to, but they are best used for ever-green content that is not likely to change often or require delicate personalization. For example, the opening hours of the library, directions to campus, and university contact details. You can encourage academic stakeholders to provide you with information about their departments, what they offer, and information they would like prospects to know before applying.

Pros & Cons: Content pages are extremely versatile, because they are simply webpages that are saved onto the app. If you have a colleague with HTML and CSS knowledge to work with you can create some really great things (and if you don't, you can always use one of campusM's preexisting templates). Some institutions have even put in scripts from third-party vendors to facilitate an automated chat within their Content Pages – so the possibilities are truly endless. Note that these pages can sometimes feel a little bland without a good design in mind, and the information can become stale or outdated if there's no content management process in place.

Documentation on Creative Studio and Content Pages can be found in our Knowledge Portal.

FAQs Using List Product Integration



Description: While FAQs can be placed in a standard content page, the List PI provides a more interactive experience that's easily configured. This will allow students to easily browse the most frequently asked questions and get the answers they need. You can easily segment the FAQs into categories, which prospects can filter by if you so choose, you can add a search bar for easy browsing of the questions, and allow marking questions as favorites in case they would want to come back to a certain answer.

Usage Example: A prospect who is not really sure where to find the answer to a question would tap on the "FAQs" tile on the app home-page. They may then filter through the different categories or use the built-in search bar to narrow down their search - and finally, they will find the answer to their question. They might also see other questions that they hadn't thought of asking yet, and mark important ones as favorites for later.

Pros & Cons: While generally, there is an option to personalize Lists by using APIs, there's not a good way to do so with prospects due to the aforementioned anonymity. That being said – Lists is one of the only Product Integrations that can be entirely configured in app manager without any technical knowledge. You may either use the different categories to help narrow down the users' search, or alternatively you may also create several FAQ Lists and present each one to the relevant user group according to the personalization you have set up per the section above.

Documentation on List PI can be found in our Knowledge Portal.

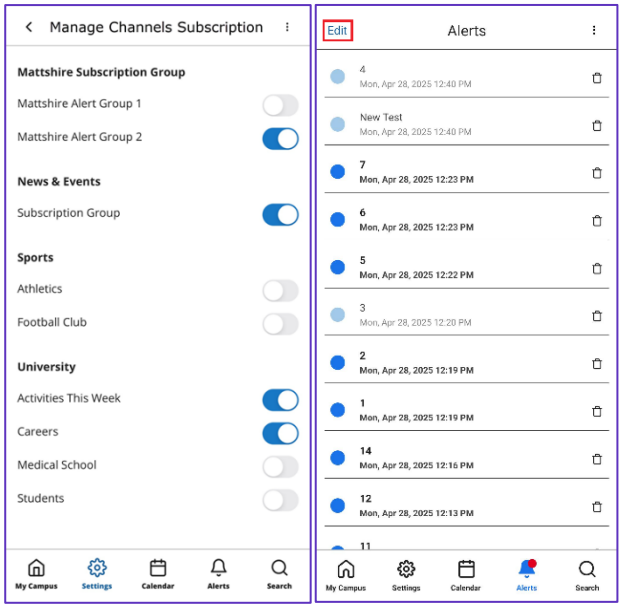
Notifications and Alerts

Note: *In most cases, notifications can only be sent to authenticated users. Anonymous users only receive notifications in two cases:*

1. *As part of an All-Users group (see below for details)*
2. *When sending a notification to the Default role of an anonymous profile.*

Description: Push notifications are used in many apps, and campusM is no different. Push notifications have a much higher likelihood to be read when compared to traditional communication methods, such as email. Notifications can be prescheduled and programmed to be sent at strategic times, and are effective for use before, during and after Welcome Week.

A whole section on Notification Best Practices can be found further down this document.



Navigating the Open Day

Anyone's first time on a new campus, with hundreds, or perhaps thousands of other people, is stressful for anyone. Fortunately, campusM has several features that can make this experience a little easier by helping students know when and where they need to be.

User Story

As a prospective student I want know when and where to go during the Open Day.

As an institution I want to help my prospects feel confident navigating a new environment so that their Open Day experience is a positive one.

Maps

Description: While it may seem obvious to you where things are on campus, your prospects will usually have no idea where to find the restroom, let alone their long list of open day activities. Adding a map to campusM will allow students to better find their way around campus and feel more confident and comfortable getting around.

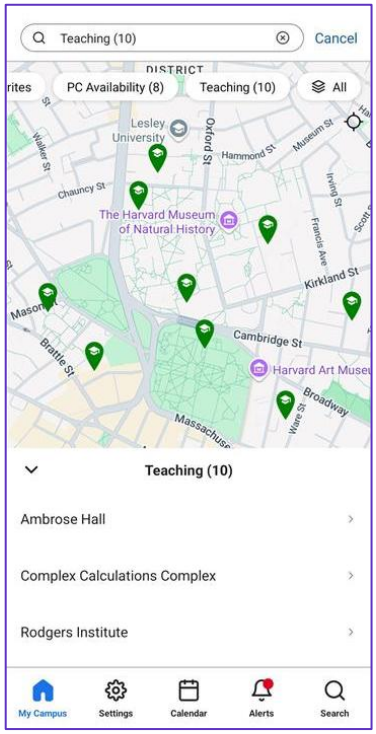
Usage Examples: A Maps tile can be implemented on your app home-page, allowing the student to get a sense of the size and location of your campus. During the Open Day, they can open this Maps tile to navigate to their next location with ease and discover all the best spots on campus. Different maps can be created for different campuses if relevant, and different location categories can be shown to different roles.

To truly customize your maps for prospects, we recommend following these guidelines:

- Make sure each location has an image - if it's a building, a picture of the main entrance, if it's a room, a picture of the door… These visual cues make it as easy as possible for your prospects to find their way around.

- Configure extra locations that you might take for granted, such as restrooms, green spaces, the local coffee cart, and areas of interest that make your campus stand out.
- The Floor Plan feature is useful if you expect students to need to find their way inside of the winding hallways of a building that are not part of Google Maps.

There are unconventional ways to use maps, so feel free to get creative with it! For example, you can create a scavenger hunt on campus or a self-guided tour to encourage your prospects to walk around and get to know their (hopefully) future campus.



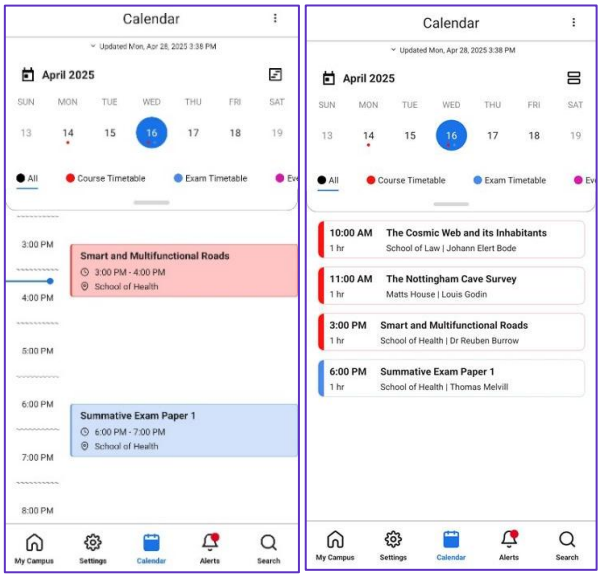
Pros & Cons: While you may (and should!) configure a maps tile on the home page for your prospects, when used in conjunction with our Events or Calendar Product Integrations (described next), they create a seamless navigation experience, as users can easily see both when and where their next activity is on one screen.

While maps do take time and effort to set up, they don't need much updating on a regular basis unless your campus is going through major renovations. Furthermore, campusM maps are entirely re-usable, the same map and locations can be used differently by different profiles and roles – so configuring a map for your Open Day users would also benefit your existing students and staff. The opposite is also true – if you have a map set up for your existing users, tweaking it for Open Day students is less effort than you think.

Documentation on configuring Maps can be found in our Knowledge Portal.

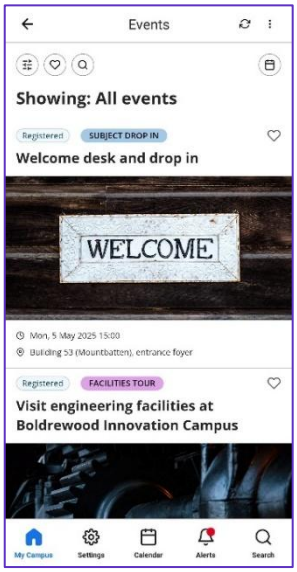
Events & Timetable Product Integrations

Description: Even though the Events and Timetable Product Integrations are two different features with different behaviors – they both do the same thing: give your prospects their schedule for the day and provide them with a handy notification before each event begins. Which integration you want to use depends on your ideal flow, how you've chosen to personalize the Open Day experience, and how your open day is structured – and you may choose to use a combination of both! For your convenience, the main differences are summarized in the Pros & Cons section below.



Usage Examples: Fifteen minutes before the introductory session, all prospects receive a notification on their phone that it's about to begin. The event page contains the description and time of the event (and if integrated with campusM maps – shows them the location on the same page) so they know exactly what to expect and where to go. After the introductory session, each student checks their calendar on the app to see their schedule for the rest of the day. If using the Events PI, they can also search for events that they wouldn't necessarily have been assigned to automatically, using tags and filters to find what they need and add it to their Open Day calendar.

Pros & Cons: See the table below for a quick comparison of these features.



If you're using Roles to personalize the Open Day experience, and the schedule for the day is pretty structured once those roles are known, the Timetable PI would be advantageous. Each Timetable will only be shown to the appropriate role, and the prospects' activities will appear in the campusM calendar automatically, accompanied by a helpful notification before the activity begins.

If prospects can freely choose a variety of activities to attend regardless of personalization options, OR if your institution lacks the resources to set up an API – the Events PI would be more suited for your Open Day. The Events PI lets users browse and choose their events. Events that they have favorited (by tapping the heart icon on the top right) appear in their calendar and will generate notifications before they begin.

	Timetable PI	**Events PI**
Data Source/Vendor (multiple integrations with different sources may be used in parallel)	Celcat, Ellucian, MyTimetable, Oracle PeopleSoft, Databee, Google Calendar, Microsoft Graph API or generic RESTful API.	A manual Excel sheet, RSS feed or generic RESTful API
Personalization done via…	Profiles, Roles	Profiles, Roles
Activities appear in **campusM calendar** and generate **reminder push notification…**	Automatically	Only if event was manually favorited/registered by the user
Browsing and searching for activities…	Only possible by browsing the calendar, no real search option.	Possible with search bar and tagging system.

Documentation for the Timetable and Events Product Integrations can be found in our Knowledge Portal.

After the Open Day

Once the Open Day is over, any feedback you can get on how it went is vital in order for the next Open Day to be even better! Furthermore, you want to make sure that your prospect knows what to do if and when they choose to apply to study at your institution.

User Story

As an applicant I want to track and complete my application process.

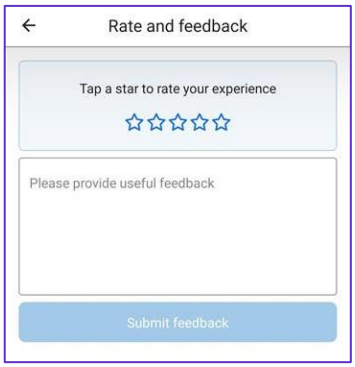
As an institution I want to receive feedback so that I may improve future Open Days.

As an institution I want to follow up and provide applicants with a clear path towards completing their application.

Explicit Feedback – Quick Polls and the Feedback feature

Feedback from your prospects is important as it will help you do better in your next open days and provide insight into why students choose to apply (or not to apply) to your institution. You may want to use a Quick Poll with an open-ended answer for this – as it easily generates a notification to prompt feedback. If you used Quick Polls for personalization, this workflow will also be familiar to the users.

Another option is to use the built-in Feedback feature, which can be found by tapping the kebab menu on the upper right-hand corner of the app. Note that most users would need prompting to use it (Push notification? Banner tile? It's up to you!).



Documentation on setting up a Quick Poll and Feedback can be found in our Knowledge Portal.

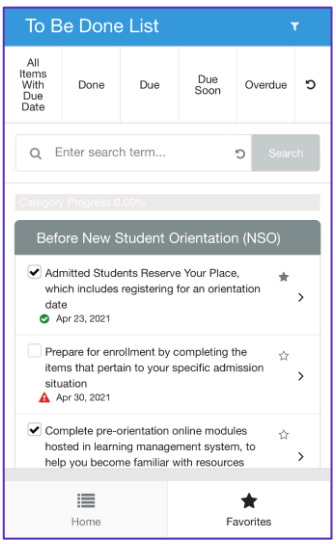
Implicit Feedback – Analytics

Another way to measure the success of your open day is to utilize campusM analytics to measure app engagement. What you want to measure is up to how you define your success. You may use our out-of-the-box reports to measure things like tile-clicks and page views, which can be filtered for your Open Day profile. We also have tile-clicks and page view data segmented by role (though note that if a user has multiple roles, that will inflate the numbers you see). If you'd like to create your own custom report, for example, to measure the average number of sessions per user, you can do that as well.

Documentation on campusM Analytics can be found in our Knowledge Portal, and a recorded training session can be found in our June 2024 webinar.

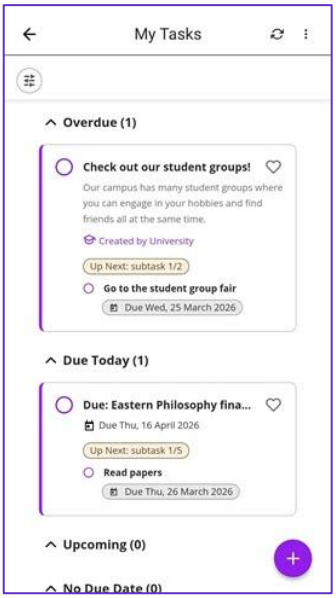
How do I apply? – List / Task Board Product Integration

Hopefully, once your prospect has decided to become an applicant – they will have all the information they need to do so, right inside the same app they already downloaded for your Open Day! The Application To-Do list will help students keep track of the tasks they need to do and their deadlines.



Description: The Task Board product integration is a great tool for managing the many steps towards application. Using Task Board also allows the user to create their own tasks as needed, and to set reminders for each task via push notification. The List product integration is also great for task management, as it supports due dates and allows you to filter and search for tasks but is less sophisticated in terms of additional features.

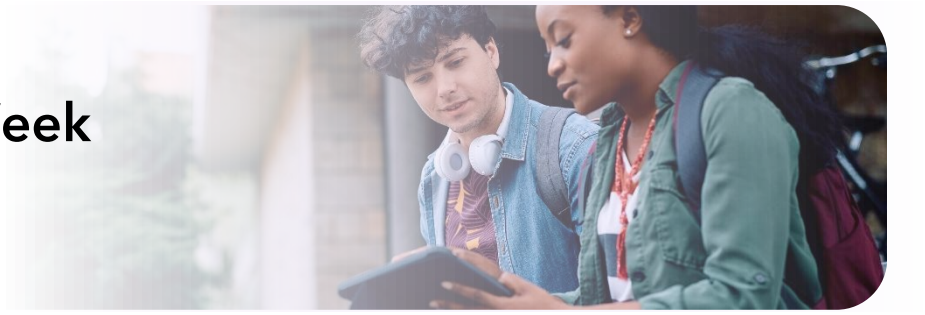
Usage Example: After the Open Day has finished, your prospect will open the app and discover a new tile which you've exposed, called "Application Checklist". This user will tap on the tile and see all the forms, tasks and to-dos which they need to complete in order to apply to your institution. They will be able to track the deadline for each item, and make sure they have everything they need to successfully apply.



Pros & Cons: Both Task Board and List Product Integration allow you to configure the tasks directly in app manager – no technical skills required. While Task Board has a newer UI, and more task-oriented functionality, it only works for authenticated users, and will not work for anonymous profiles.

Documentation on List and Task Board can be found in our Knowledge Portal.

Welcome Week



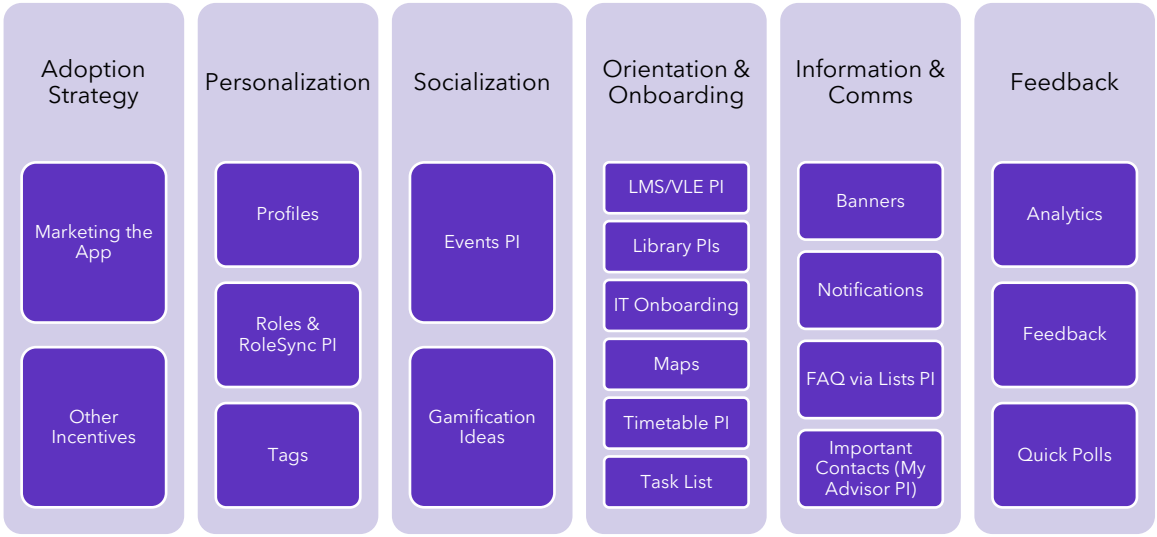
Overview

After a long summer, it's finally here – Welcome Week! A new and exciting start of yet another academic year, with all the challenges that accompany it. While this is an important week for returning students and staff, it's absolutely critical for your first-year students and for the staff onboarding them.

Before we begin, let's review the needs and wants of your institution and of your students:

*As an **institution, during Welcome Week** my **goal** is...*	To provide easily accessible and clear information to students.
	To encourage students to complete onboarding activities ASAP.
	To facilitate social interactions between students, to help them develop a sense of belonging.
*As an **institution, during Welcome Week** I want to **avoid**...*	Confusing people by providing too much information, conflicting information, or by overcomplicating the information's delivery.
	Technical issues, logistical issues and other frustrating factors.
*As a **student, during Welcome Week,** my **goal** is...*	To meet new people and make friends.
	To get to know the campus, its services, my schedule, and to orient myself generally.
	To know how to find answers to my questions, and who to turn to when I need help.
*As **student, during Welcome Week,** I want to **avoid**...*	Negative emotional experience - feeling isolated, awkward, overwhelmed, unprepared, like an imposter, or culture shock.
	Missing out on important information or tasks that everyone will know about but me.

In this Welcome Week section, we've found 6 areas of interest to focus on when planning your campusM configuration and implementation:



Adoption Strategy

One of the repeating questions campusM customers have, is "How do we get the students to download the app?". Unless your students are forced to use the app (for example, in institutions that use the Attendance feature) – you must think of how to make the app attractive and useful enough to have students choose to download it on their own.

User Story

As an institution I want students to install the app on their devices, so that I can use the app to engage students further.

By definition, both these strategies cannot happen on the app, as the students haven't downloaded it yet – but the outcome is far from outside your control.

Marketing the App

Your students can't download an app they don't know about, so the first step is to make sure that your students are aware your app exists. If you have a marketing expert on the team, this is the time to let them loose.

The messaging should be concise and clear about why your app is worth a download – for example, 'Know what's happening on campus with [app name]', or 'Never miss a class with [app name]'. The call to action is obvious: two links (whether in clickable or QR form, depending on the format), one to the app in the App Store, and one to the Google Play Store. If your institution chooses to, a third link to your campusM Web App can also be added.

When to market the app?

- Marketing the app should ideally start **before students arrive on campus**, as far back as the Open Day, if possible, but starting in the acceptance letter, or welcome email is great as well.
- Regardless of when you start, the app should be heavily marketed during Welcome Week – as that's the time when your students are most likely to download it.
- Finally, the app needs to be marketed to a new cohort of students every year. Do not rely on word-of-mouth marketing from older students, as new students who don't have connections with them will be left out of the loop.

Other Incentives

While we always want users to understand the inherent advantages of having the app installed, another way to encourage students to download your app onto their device is to provide them an outside incentive to do so, as your budget allows. For example, upon showing a staff member that they've downloaded the app and logged in, students can receive a voucher for a free meal at the cafeteria, or a small, branded piece of university merchandise. While this may seem a little crude, this will help you get your foot in the door with some of the harder-to-reach students.

Personalization

User Story

As a new student I want to only see information that's relevant to me so that I don't get overwhelmed.

As an institution I want to provide a personalized experience so that my students are not confused by irrelevant information.

One of the main feelings that students report in their first week is overwhelm, and it's not hard to understand why. There is so much new information to take in – new places, social norms, living situations, academic expectations – and filtering through all of it is difficult and time-consuming. To help avoid those feelings of overwhelm, campusM provides several robust personalization options to choose from. This way a student only sees the information that's relevant to them and is not confused by information meant for groups to which they don't belong.

These personalization options will serve your end-users into the next stage of their student journey beyond Welcome Week, so while the setup for these might take time and resource, it's very much worth the effort. We recommend using at least one, if not both of the following options: Profiles and Roles.

Profiles

Description: Upon logging into the app, users can choose the profile they want to use. This profile allows you to configure entirely different authentication flows, home screens and branding and is ideal for targeting large groups.

Usage Examples:

- Institutions that want their students to use the app before receiving their institutional login can setup a special Welcome Week profile with no authentication. Once receiving their credentials, users can switch to the authenticated profile.
- Institutions with different campuses will often want to have complete control over their student's experience and might benefit from separate profiles.
- Multi-lingual institutions benefit from having a profile for each language.

Pros & Cons: While separate profiles may sound like a great way to have ultimate control over the student experience that doesn't require a lot of technical resource, it's not generally recommended without good reason. The users choose the profile they are logging into – which means that they may choose incorrectly, causing more confusion than helping. If you'd like to eventually consolidate users into one profile, you will need to have them switch profiles – which can be done easily using our campusM URLs, but this would still require user action, and cannot happen automatically. Additionally, maintaining separate profiles is a lot of work and

only provides a crude personalization if not combined with other personalization methods below, and therefore may not be sustainable for smaller institutions.

Documentation on creating profiles can be found in our Knowledge Portal.

Roles and RoleSync

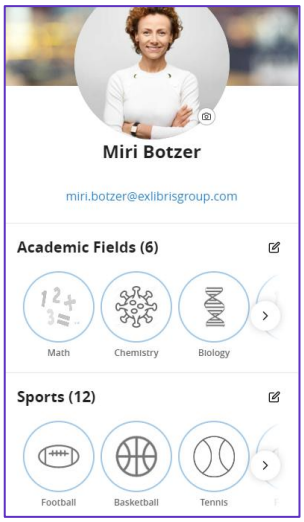
Description: Roles are by far the most robust and scalable tool at your disposal to personalize your app, as they update the app automatically, in real time, and en masse. Roles utilize the hard facts that you already know about your student and are stored in your identity management system (IdP) - what year of study they're in, their major, what campus they're on, their disability status, etc. - and empower you to personalize their app experience accordingly. Almost any feature on the app can be turned on/off by role: notification groups, maps and location categories, the appearance of tiles, calendar feeds… the possibilities are endless. The RoleSync Product Integration checks which users had role changes since they last logged into campusM and flags them for RoleSync the next time they open the app. This RoleSync takes place even if they were already logged into the app when they open it. This makes sure that your user's roles are always up-to-date, even if they change day-to-day.

Usage Examples: Users will see an app home page that is automatically catered to them, while information that's irrelevant will be kept hidden. For example, implementation of Roles per campus ensures that if a student only attends their studies in campus A, they won't receive notifications about traffic disruptions happening in campus B, which might confuse them. Another example: implementation of Roles for students with a known disability will allow you to more prominently expose accessibility information on their homepage, while students without that role will be able to find it less directly.

Pros & Cons: Roles is truly one of campusM's strongest features, and correct implementation can transform your app from a generic link aggregator to a personalized and relevant experience, that helps your students know what they need to know and filters out the rest. While this does require technical resource to set up, this is usually a one-time investment that has a significant payoff.

Documentation on Roles and RoleSync PI can be found in our Knowledge Portal.

Tags



Description: While Roles utilize the hard facts you already know about your student, Tags are for the softer facts, such as their likes, dislikes, and interests. Tags facilitate user-driven personalization, and they can be used in much the same way as Roles. The list of possible Tags is preconfigured by the institution and sectioned into categories. After login, students would go into the My Profile section of the app and be able to choose their Tags, which would indicate their interests, and allow them to personalize their experience at will.

Usage Examples: While the Tag selection screen can be reached via Settings > My Profile, you may also configure a tile on the home screen that links straight through to My Profile. For example, a Tag Category of "Societies and Clubs" can be configured. A student would be able to choose as many Tags as they would like and would then see the appropriate tiles on the app's home-screen (e.g. the Events tile for their chosen club) and start receiving notifications configured for their Tags of choice.

Pros & Cons: This gives users both a sense of control, and the ability to narrow down the monumental amount of information that's being communicated to them during Welcome Week – which will then decrease the overwhelm they might be feeling. They are also able to change their minds and edit their Tag selection at any time. However, Tags as the sole personalization method are not the best choice for every institution. Unless you remind your students to choose their tags – they might end up with little information on their home page. While this can be circumvented by a few pointed notifications/tiles, it still requires the app to remind them to do so. Tags, while versatile, are not quite as versatile as Roles (described above), which can be used to send notifications dynamically as well as to predefined groups (while Tags require a predefined notification group), to expose different timetable feeds, and show locations on the campusM map.

Documentation on My Profile and Tags can be found in our Knowledge Portal.

Socialization

One of the best predictors of a student's continuation and retention is a sense of belonging at your institution. To encourage that belonging and prevent feelings of isolation, we highly encourage your Welcome Week to include activities to facilitate the creation of social bonds between students. While there are many ways outside the app to do this (and indeed, high-quality social connections usually happen off of apps) – there are definitely ways to encourage this socialization via the app.

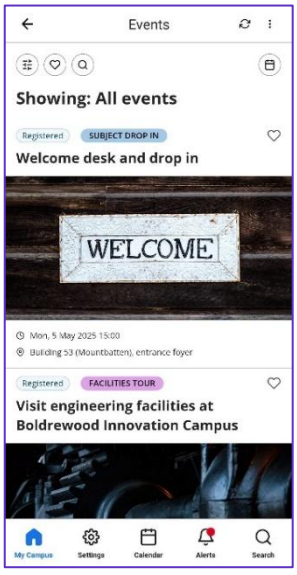
User Story

As a new student, I want to meet friends and make connections with my peers.

As an institution, I want to foster a sense of belonging for my students, in order to increase retention rates.

Events PI

Description: The Events Product Integration is a great platform to showcase all of the Welcome Week social events that are happening around campus. Events are searchable, filterable, and are added to the user's calendar upon favouriting or registration, where they receive the added benefit of reminder notifications 15 minutes before it starts. The Events PI can include many different events from many different feeds, without overwhelming the student's calendar. The Events PI is also fully integrated with the Maps feature (described in the Orientation section below).



Usage Examples: Students can tap the Events tile and browse to find the events that are right for them – whether it's a quiet introductory session for the Anime Club at the Library, or a wild party for all the dorm residents. The Events tagging feature allows students to easily filter and find the events that interest them and add only those that they want to go to into their calendar.

Pros & Cons: While the Events PI can be populated by RSS feed or generic RESTful API, it can also work with a simple Excel spreadsheet, which means that technical resource is not necessarily required to set this up. The workflow by which Events arrive to the calendar can be advantageous, especially if you have a large number of optional events. For events that you

want to appear on everyone's calendar automatically, we suggest using the Timetable PI (described in the Orientation section below).

Documentation for the Events Product Integration can be found in our Knowledge Portal.

Gamification Ideas

Gamification, or the modification of a process to resemble a game in order to encourage and reward certain behaviors, is a great way of getting students to engage, though it does require a bit of creativity to implement. During Welcome Week, you can nudge students to participate in activities and get to know each other by gamifying a social situation and providing an incentive to overcome the initial awkwardness they might be feeling.

If you've got a creative idea to use campusM for socialization between students – let us know in the Mailing List, and it might be included in the next update to the Playbook!

Scavenger Hunt

Using a combination of the Maps feature, and the Location Check-In Product Integration, you could create a scavenger hunt for students to complete in groups. Students can scan a QR code upon reaching the correct location (proving that they have not skipped any locations on the way), and receive a reward upon showing their attendance at all the different locations via their app.

Socialization Checklist

To encourage students to socialize, you can provide them with a fun checklist (via the List or Task Board Product Integrations) to complete a certain percentage of in their first week, and get a small prize. This checklist could contain items such as "find 2 other people with your name and take a selfie", "ask for directions, or provide someone else with directions", and "have lunch on the campus lawn with someone you met this week".

Orientation and Onboarding

One of the main goals for you as an institution and for your new students is to get them oriented in both the physical and digital spaces that they will inhabit for the next few years – and to do so as quickly as possible. In this section we'll go over ways to help your students find their way through your campus and your digital systems.

User Story

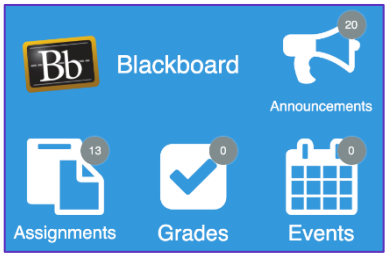
As an institution, I want to get all my students acquainted with their campus and digital systems as quickly as possible.

As a student, I want to orient myself and confidently navigate the campus, and university systems.

LMS/VLE PIs

Description: Your institution likely uses a Learning Management System (LMS) or Virtual Learning Environment (VLE) to facilitate students' learning experience – and campusM probably integrates with it as well. We have integrations with Moodle, Blackboard, Canvas and D2L Brightspace which provide students with real-time information about their assignments and classes, right on their campusM home screen.

Usage Examples: Students can get used to seeing the Live Tile for their LMS/VLE (see Blackboard example above) on the home page and start exploring their courses and syllabi. Exposing this during Welcome Week ensures that students have the time to troubleshoot any issues, and to play around with the system before the pressure of the semester starts.

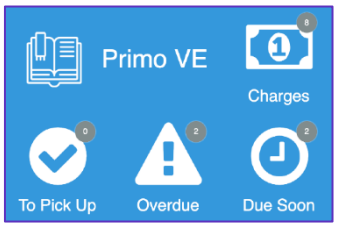


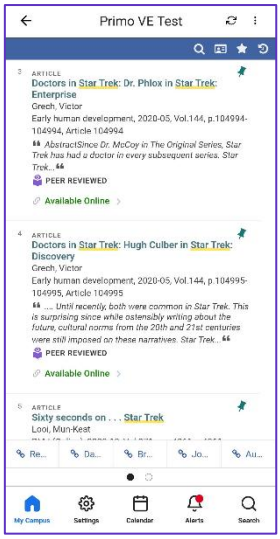
Pros & Cons: While this integration does take some time and technical resource to set up, it's a popular tile and is highly used by students in institutions where it's implemented. The in-app UI provides a clear, at-a-glance summary that students find both helpful and convenient, while still allowing seamless access to the full LMS/VLE app when needed. The Live Tile can also be configured to launch directly into the LMS/VLE app, offering institutions flexibility to match the workflow that best supports their students.

Documentation for the various LMS/VLE Product Integrations can be found in our Knowledge Portal.

Library PIs

Description: One of the most important resources on campus is, of course, your academic library, which we are uniquely equipped to integrate with. campusM has two major Library Product Integrations: Primo/PrimoVE and Summon. Both allow users to access the library's discovery platform, see their active loans, overdue books, fines, and other library information and features.





Usage Examples: Students can be exposed to the Library Live Tile during Welcome Week as an introduction to the library's offerings. This will allow them to explore and get to know your library system early on in their academic journey.

Pros & Cons: While it does take a bit of technical resource to set up, and the cooperation of the library, libraries often appreciate the exposure to the student body – and this may facilitate further collaboration with your institutional app in the future.

Documentation for the Library Product Integrations can be found in our Knowledge Portal.

IT Onboarding

Depending on the institution, Welcome Week can be a busy time for your IT team. While every institution has different processes and workflows, the process usually gets stuck when the student neglects to provide certain details. Fortunately, there are some features you can implement to make the process easier.

IT Support Tile

If configured as a normal tile, this would be the quickest way for users to receive IT help/contact information. It might be a link to a static content page, an FAQ using our List Product Integration (see section on Information and Comms) or an external link to the helpdesk.

IT Live Tile



You may configure a Generic Live Tile, which is a simple tile with a counter badge on it to indicate any pending IT issues or tasks for the student to take care of. The user can tap the tile and be linked to your IT helpdesk for further information. This requires technical resources to set up a simple API, but is also quite a strong tool to nudge students to complete their IT onboarding. This tile can be used later in the student lifecycle, if anything else comes up in the future.

If this tile is also connected to a Role (see the Personalization section above), you can configure it to only appear if the user has IT issues to begin with – which makes this option less intrusive for students with no issues to manage.

API Alerts

Notifications and Alerts more generally will be covered in the Information section below, but they are worth mentioning here as well. API Alerts can be targeted to a specific person or set of people – and therefore, can be set up to automatically send to users who have not completed their IT onboarding on a pre-determined schedule. This will help target those students who need further nudging, while not affecting others' experience of the app.

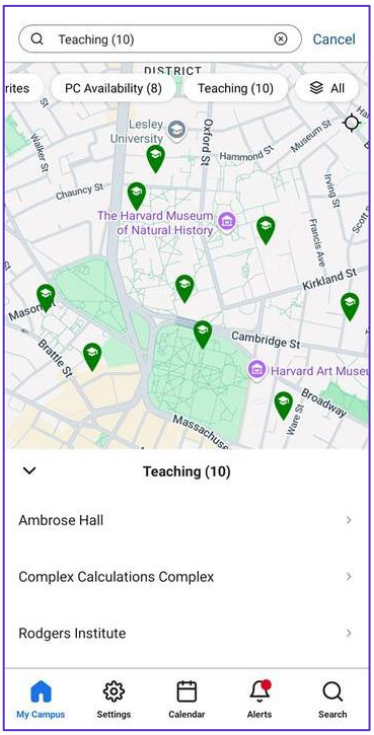
Maps

Description: While it may seem obvious to you where things are on campus, your new cohort of students will usually have no idea where to find the restroom, let alone their activities, classes and events. Adding a map to campusM will allow students to better find their way around campus and feel more confident and comfortable getting around.

Usage Examples: A Maps tile can be implemented on your app's home page, allowing the student to get a sense of the size and location of your campus. Users can open this Maps tile to navigate to their next location with ease and discover all the best spots on campus. Different maps can be created for different campuses if relevant, and different location categories can be shown to different roles.

To truly customize your maps for Welcome Week, we recommend the following guidelines:

- Make sure each location has an image - if it's a building, a picture of the main entrance; if it's a room, a picture of the door… These visual cues make it as easy as possible for your new students to find their way around.
- Configure extra locations that you might take for granted, such as restrooms, green spaces, the local coffee cart, and areas of interest that make your campus stand out.
- A specific location category for a campus tour would be a great addition to making sure your students know all the best places. You can even create a tile to link directly to a specific category of locations if you want it to stand out.
- Categorize locations in a way that would help students get around. Since locations can belong to several categories you can create several categorization methods: a category for each building is useful, but a category for all campus restrooms is a welcome addition.



- The Floor Plan feature is useful if you expect students to need to find their way inside of the winding hallways of a building that are not part of Google Maps.

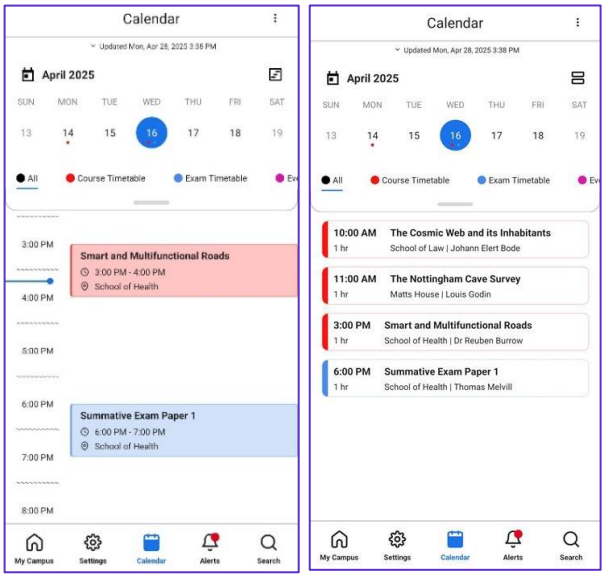
Pros & Cons: You may (and should!) configure a maps tile on the home page for Welcome Week – and you may also use it in conjunction with our Events (see Socialization section above) or Timetable (see below) Product Integrations. These features used together create a seamless experience, as users can easily see both when and where their next activity is on one screen.

While maps do take time and effort to set up, they don't need much updating on a regular basis unless your campus is going through major renovations. Furthermore, campusM maps are entirely re-usable, the same map and locations can be used differently by different profiles and roles – so configuring a map for your Welcome Week users would also benefit your existing students and staff. The opposite is also true – if you have a map set up for your existing users, tweaking it for your Welcome Week students is less effort than you think.

Documentation on configuring Maps can be found in our Knowledge Portal.

Timetable PI

Description: The Timetable PI is by far the most used by students in any institution that it's configured. This integration queries one or multiple vendors to retrieve the student's schedule and puts it directly into their campusM timetable. This is consistently rated by students as the most useful feature of campusM for everyday use.



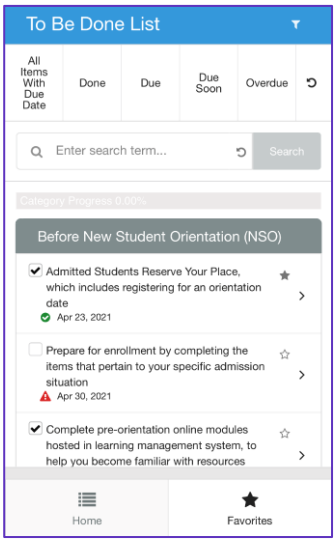
Usage Examples: The user would automatically have their calendar populated by events from their timetable. The activities from this integration can generate reminder notifications that the end user may configure to their preference. This is ideal for activities that are mandatory for your Welcome Week students, or that you want users to be aware of.

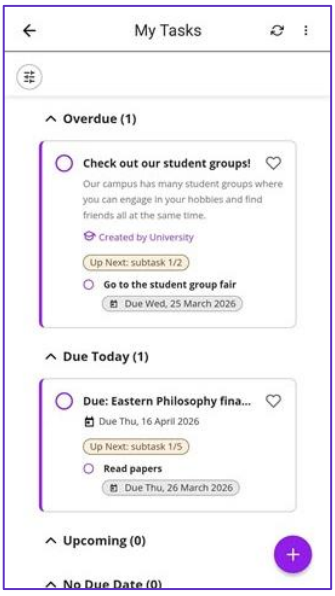
Pros & Cons: While it takes considerable technical resources to get set up, the Timetable PI is worth configuring generally as it will be of significant use throughout the student's lifecycle at your institution. Specifically for Welcome Week, this integration is ideal for events that are mandatory, or that are more orientation-focused. Unlike the Events PI (described in the Socialization section above), users cannot search for the events, only filter them by feed.

Task Board and List PI

Description: The Task Board product integration is a great tool for managing the many onboarding tasks a student needs to complete during Welcome Week. Using Task Board also allows the user to create their own tasks as needed, and to set reminders for each task via push notification. The List product integration is also great for task management, as it supports due dates and allows you to filter and search for tasks but is less sophisticated in terms of additional features.

Usage Example: This user will tap on the To-Do tile, and see all the forms, tasks and to-dos which they need to complete in order to complete their onboarding. They will be able to track the deadline for each item, and make sure they have everything they need to successfully apply.





Pros & Cons: Both List and Task Board Product Integrations, allow you to configure the tasks directly in App Manager – no technical skills required. If onboarding processes may look different for different students, Task Boards are better suited, as admins can target different tasks in the same PI by App Role, while using Lists PI would require configuring several different PIs, and use the App Builder to target them each appropriately on the Home Page.

Documentation on List and Task Board can be found in our Knowledge Portal.

Information & Comms

During Welcome Week, you will need to communicate a lot of information to a great number of students. While you may default to emails for official communications, students rarely read those consistently. Supplementing your messaging via the app increases your chances of getting through to the students. Used in tandem with our personalization features mentioned above, messaging can be targeted so that each student receives only the information that's relevant to them, without unnecessary noise.

User Story

As an institution, I want to communicate information to students in an effective way.

As a student I want to know what's going on, and to be able to find the information I need.

Banner/Feeds Tiles

Description: Banner and Feeds tiles serve much the same purpose – using the prime real estate of your app's home page to get information in front of students' eyes. Both tiles consist of a carousel of images that is presented on the Home Page, and clicking on these images directs the user to a URL of your choice (inside or outside the app).

Usage Examples: Users opening their app see a large banner tile which prominently displays a reminder to check out your institution's selection of Clubs and Societies. The next image might be an advertisement for the Start of Term party, hosted by the student union. Another image could remind students to make sure they have completed their IT Onboarding. Alternatively, or additionally, a feeds tile could appear, with an automatically updating feed of campus news items.

Pros & Cons: These tiles are highly recommended as the animation of the images flipping through adds life and interest to the home page. Banner tiles tend to be more high-maintenance than RSS feeds, as they have to be updated manually by campusM staff, but require no technical resource to set up and have a generally cleaner look. The Feeds tile

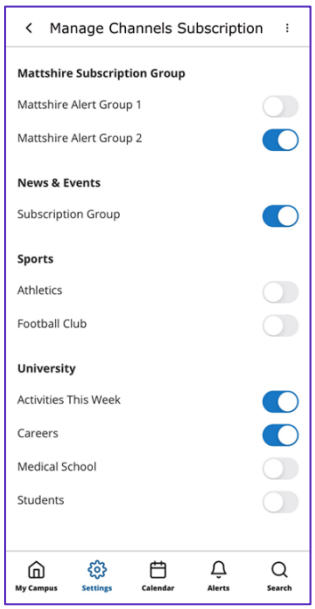
requires a technical resource to set up an RSS feed if one doesn't exist already, but then the maintenance is usually easier, as you can update the RSS feed outside of the App Manager via whatever system you already have. The feeds tile is not as clean-looking as the banner tile, as the title of the RSS item is rendered as text over the image.

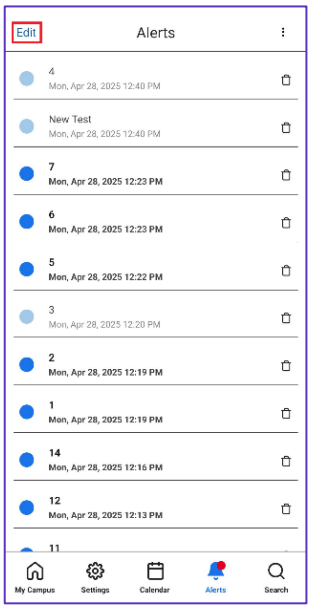
Documentation on Banner and Feeds tiles can be found in the Knowledge Portal.

Notifications and Alerts

Description: Push notifications are used in many apps, and campusM is no different. Push notifications have a much higher likelihood to be read when compared to traditional communication methods, such as email. Notifications can be prescheduled and programmed to be sent at strategic times, and are effective for use before, during and after Welcome Week.

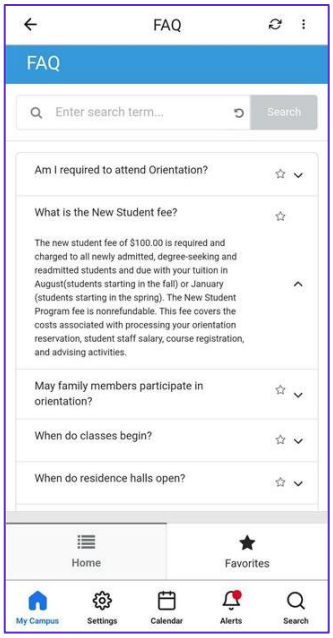
A whole section on Notification Best Practices can be found further down this document.





FAQs Using List Product Integration

Description: While FAQs can be placed in a standard content page, the List PI provides a more interactive experience that's easily configured. This will allow students to easily browse the most frequently asked questions and get the answers they need. You can easily segment the FAQs into categories, which students can filter by if you so choose, you can add a search bar for easy browsing of the questions, and allow marking questions as favorites in case they would want to come back to a certain answer.



Usage Example: A student who is not really sure where to find the answer to a question would tap on the "FAQs" tile on the app homepage. They may then filter through the different categories or use the built-in search bar to narrow down their search - and finally, they will find the answer to their question. They might also see other questions that they hadn't thought of asking yet, and mark important ones as favorites for later.

Pros & Cons: While generally, there is an option to personalize Lists by using APIs, it isn't worth the technical effort for most institutions. Lists is one of the only Product Integrations that can be entirely configured in app manager without any technical knowledge. You may either use the different categories to help narrow down the users' search, or alternatively you may also create several FAQ Lists and present each one to the relevant user group according to the personalization you have set up per the section above.

Documentation on List PI can be found in our Knowledge Portal.

Important Contacts using the My Advisor PI

Description: One of the struggles of being a new student is not only a lack of knowledge, but more importantly not knowing who to ask in order to get an answer. While you can make a simple content page for contact details, or use the List PI in a similar fashion, you can also implement the My Advisor Product Integration for a more dynamic experience. While the name of the integration references advisors, you could list anyone there that made sense: counselors, mentors, RAs, Student Union leaders, and, of course, advisors. This integration can retrieve a list of contacts that is specific to a student, which is especially useful if you have different contacts for different student populations.

Usage Examples: A new student has a question that they answer with the app's FAQ, and doesn't know who to turn to next. A tile, or answer in the FAQ links them to the integration, where they can see a list of names and contact information to turn to.

Pros & Cons: As previously mentioned, you could provide this functionality with a variety of campusM integrations or features. Doing it with the My Advisor (any vendor) or List PI (API vendor) provides the dynamic ability to present different contacts to different students. If you'd like to opt for a less technical-resource-heavy option, the List PI with no vendor, or even a simple content page will probably do just as well.

Documentation on the My Advisor PI can be found in our Knowledge Portal.

Feedback

Once Welcome is over, any feedback you can get on how it went is vital in order for the next Welcome Week to be even better! Furthermore, you might want to get a feeling for what this cohort of students might still need, and how you might be able to help them.

User Story

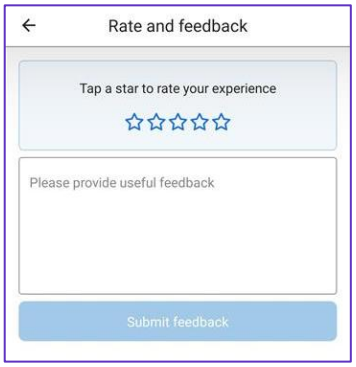
As an institution I want to receive feedback so that I may improve future Welcome Weeks.

As an institution I want to receive feedback so that I may identify any unmet student needs.

Explicit Feedback – Quick Polls and the Feedback feature

Feedback from your students is important and often provides insight into the students' experience. You may want to use a Quick Poll with an open-ended answer for this – as it easily generates a notification to prompt feedback.

Another option is to use the built-in Feedback feature, which can be found by tapping the kebab menu on the upper right-hand corner of the app. Note that most users would need prompting to use it (Push notification? Banner tile? It's up to you!).



Documentation on setting up a Quick Poll and Feedback can be found in our Knowledge Portal.

Implicit Feedback – Analytics

Another way to measure the success of your Welcome Week is to utilize campusM analytics to measure app engagement. What you want to measure is up to how you define your success. You may use our out-of-the-box reports to measure things like tile-clicks and page views. We also have tile-clicks and page view data segmented by role (though note that if a user has multiple roles, that will inflate the numbers you see). If you'd like

to create your own custom report, for example, to measure the average number of sessions per user, you can do that as well.

Documentation on campusM Analytics can be found in our Knowledge Portal, and a recorded training session can be found in our June 2024 webinar.

Playbook Scenario – Current/Continuing Student

Overview

Journey Stage	Stage Description	Goals	campusM Feature Highlights
Current/ Continuing Student	Offer continuous support to students during their studies, including daily logistics, engagement, attendance, information, service delivery, and communication	Boost student engagement, academic success, administrative efficiency, personalized digital experiences, communication, and well-being through personalized features, LMS integration, streamlined tasks, unified communication, and wellness resources	• Unified Calendar • Attendance Capture • Library Services • LMS • Digital ID Card • Room Booking • Email • Task Board • Campus Maps • Student FAQs

Introduction

Provide ongoing support for students throughout their studies. This encompasses day-to-day logistics, engagement, attendance, information and service delivery, communications, and more**.**

Goals

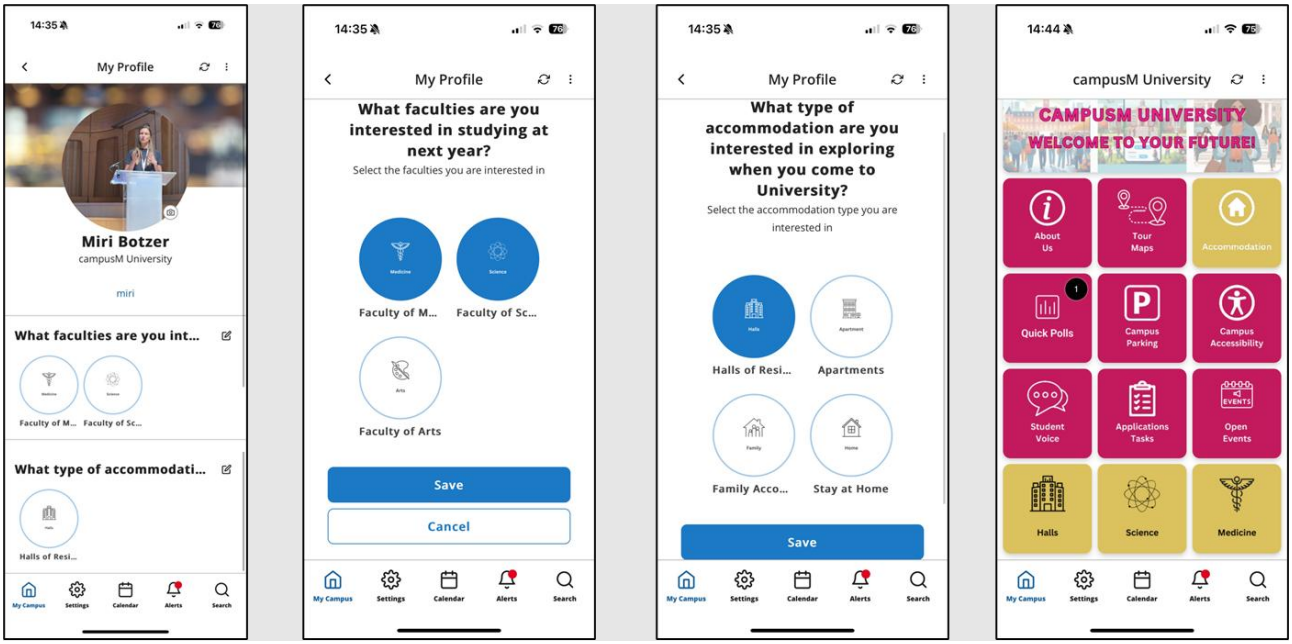
- **Enhancing Student Engagement and Retention:**
    - Goal: Increase student engagement and retention rates.
    - How campusM aligns: The app provides a personalized, seamless experience that keeps students engaged with campus life through features like push notifications, event calendars, and social media integration.
- **Improving Academic Success:**
    - Goal: Support students in achieving their academic goals.
    - How campusM aligns: The app integrates with Learning Management Systems (LMS) like Canvas and Moodle, providing easy access to course materials, grades, and assignments.
- **Streamlining Administrative Processes:**
    - Goal: Enhance administrative efficiency and reduce operational costs.
    - How campusM aligns: The app offers features like resource booking, attendance tracking, and integration with Student Information Systems (SIS) such as Banner and PeopleSoft, simplifying administrative tasks.
- **Personalizing the Student Digital Experience:**
    - Goal: Tailor digital interactions to individual student needs and preferences.
    - How campusM aligns: The app offers a personalized homepage, notifications, and content access based on students' fields of study and preferences. This ensures that each student receives relevant information and resources, enhancing their overall digital experience.

- **Enhancing Communication:**
    - Goal: Improve communication between students, faculty, and administration.
    - How campusM aligns: The app provides a unified platform for all campus communication, ensuring that important messages reach the right audience at the right time.
- **Supporting Student Well-being:**
    - Goal: Promote student health and well-being.
    - How campusM aligns: The app can include features for mental health resources, wellness tips, and access to counseling services.

Feature Focus

Personalization Hierarchy

- **Roles and Role Sync**
    - Hide or show menu options, maps and locations, populate notification groups, and more, based on Roles.
    - Synchronize personalization metadata from your identity management system or SIS to tailor services to the student context using Role Sync.
- **My Profile and Tags**
    - Capture metadata from soft facts, preferences, etc.
    - Deliver a tailored experience based on selected tags.



How to

Tags and My Profile Training

Tags and My Profile - Knowledge Portal

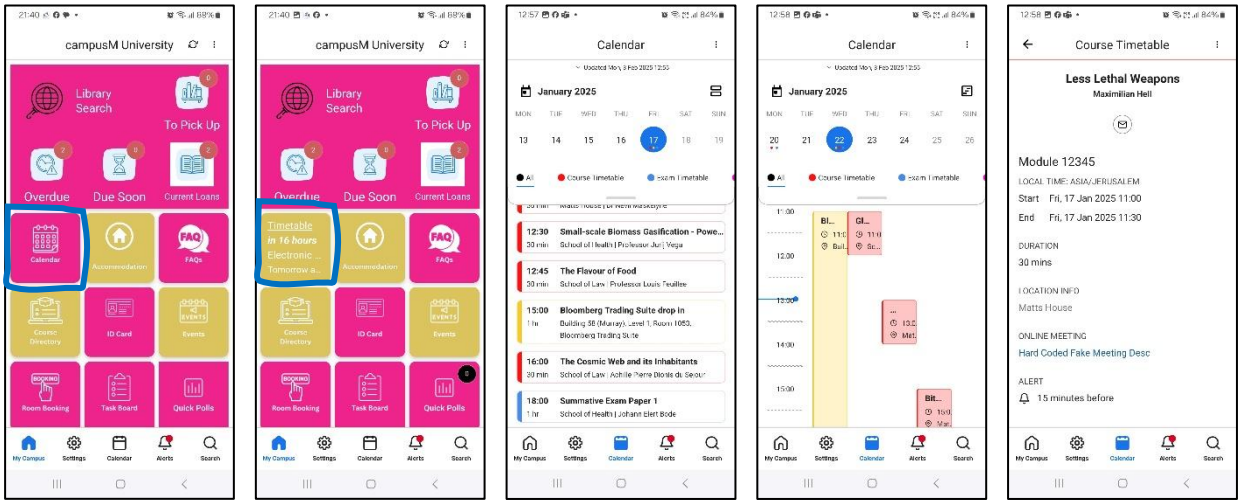
Unified Calendar & Day View Using the Timetable and Events PIs

Provide a unified schedule to enable students to plan their day and week ahead.

Integrate favorites and registered events into the calendar to give students a comprehensive view of their day.

Link classes and events with map locations to simplify navigating to classes.

Utilize the calendar to display exam timetables at the relevant times of the year, including seat assignments.



How to

Timetable - Knowledge Portal

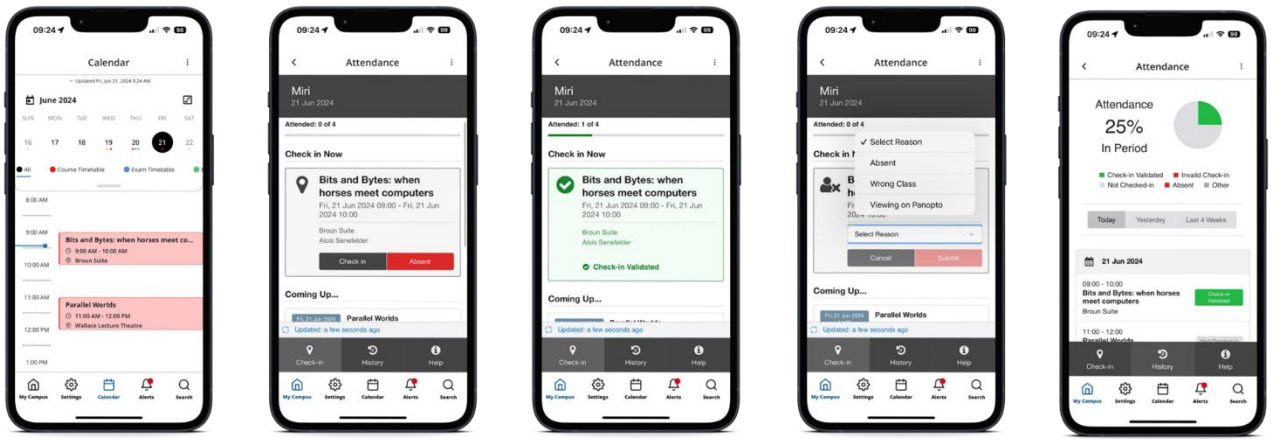
Events - Knowledge Portal

Attendance Capture

Capture of student attendance in classes is simple and direct.

Multifactor validation provides a flexible approach to validating students' presence in class.

Real-time access to attendance transactions enables the estimation of student engagement quickly and easily.



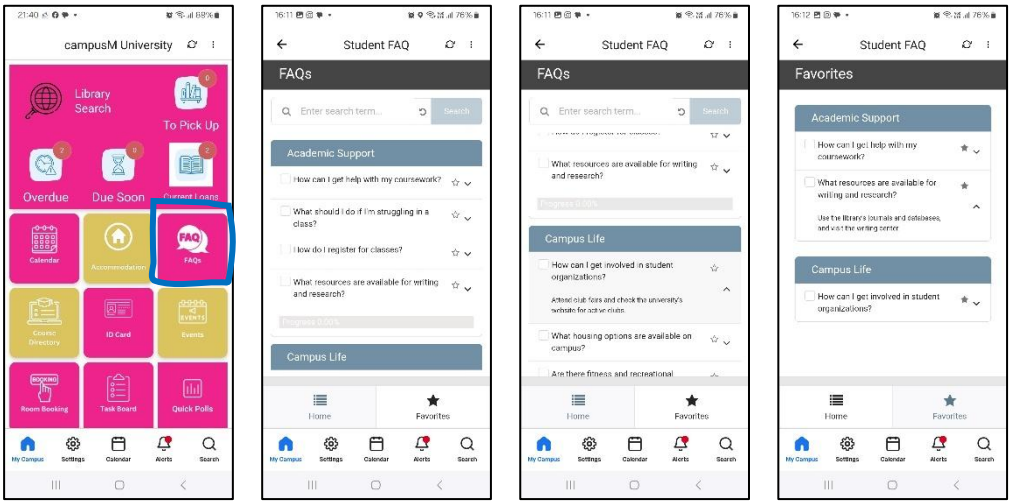
Driven by the timetable | Check-in Dashboard | Real time feedback | Absent check-ins | Tracking Check-ins

How to

Managing campusM Attendance - Knowledge Portal

Student FAQs Using the List PI

A static or dynamic list of searchable FAQs aimed at supporting students through their studies can be created using the List PI.



How to

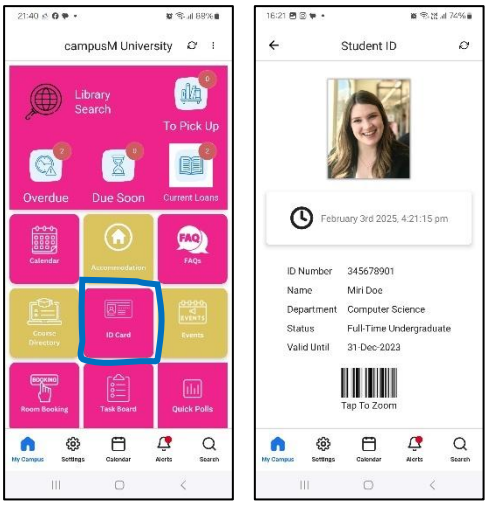
List - Ex Libris Knowledge Center

Accessing Learning Resources Using PIs

PIs can provide seamless access to digital services, such as the students' learning management systems, library search, and reading lists directly from the app.

Digital ID Card from Day One Using the ID Card PI

Reduce registration efforts and costs by delivering a digital ID card to new students.



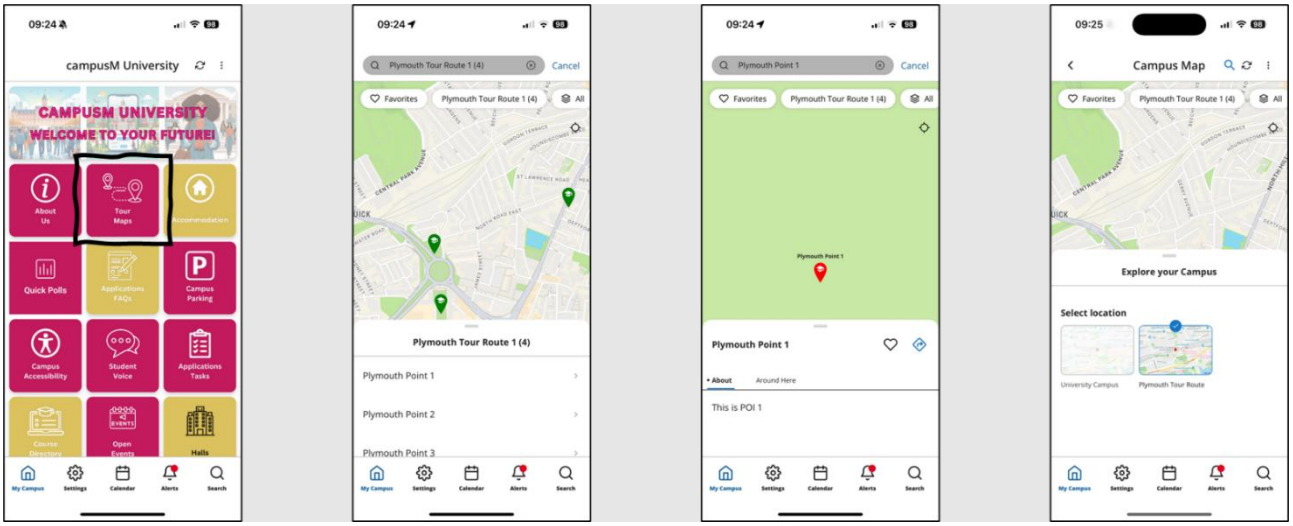
How to

ID Card - Knowledge Portal

Campus Maps

Provide students with information about facilities across campus, from food to libraries, faculty offices and PC clusters with the Map feature.

Add links from timetables and events to maps to ensure students can get where they need to go.

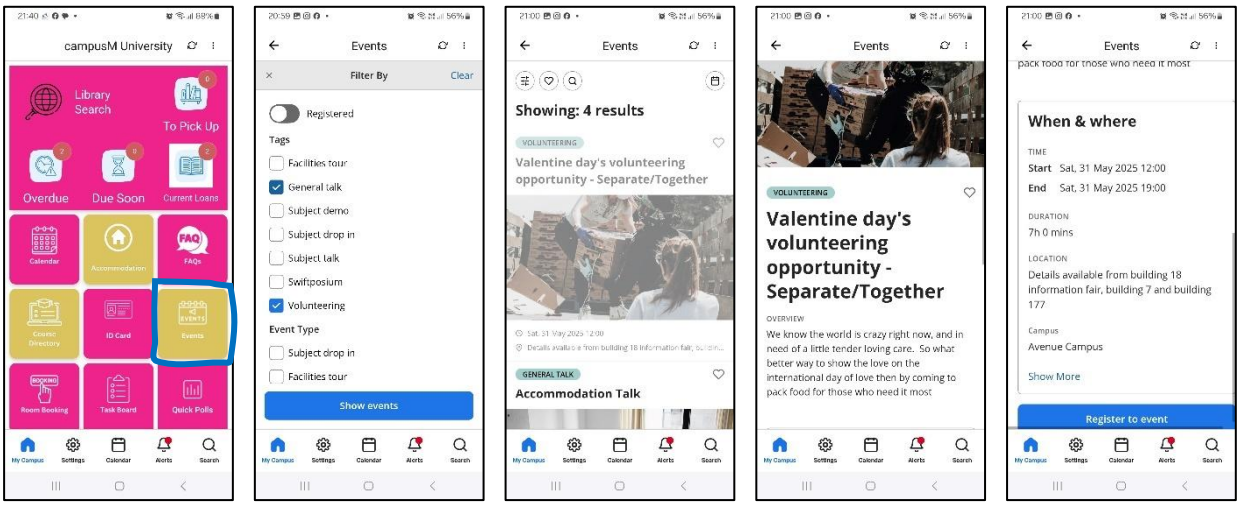


How to

- Maps and Locations Training
- Maps and Locations - Knowledge Portal

Publish Campus Activities Using the Events PI

Promote additional activities that enrich campus life, and provide search and discovery capabilities to assist students in finding out about events and extracurricular classes taking place on campus.

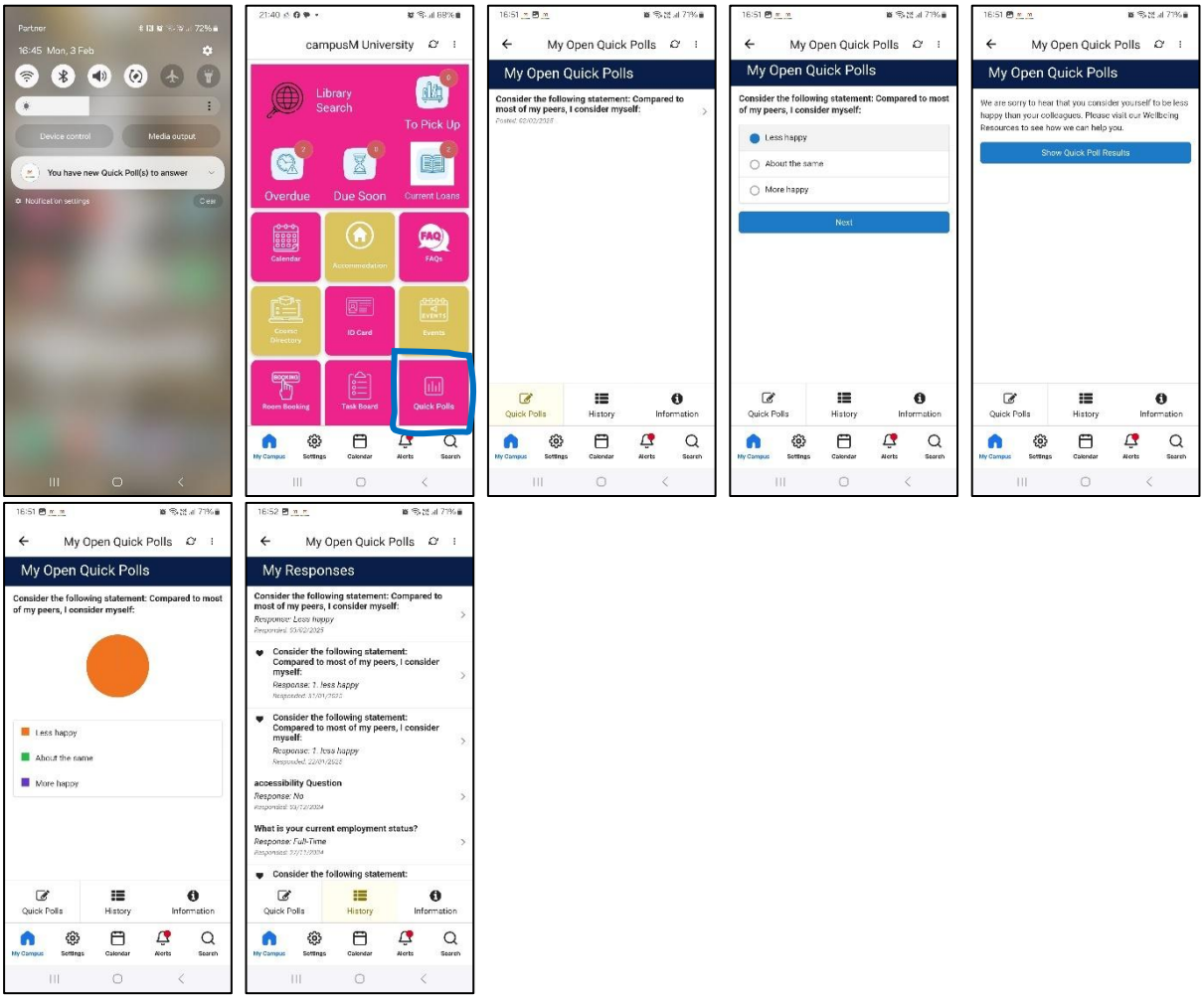


How to

Events - Ex Libris Knowledge Center

Poll Student Wellbeing Using Quick Polls

Create recurring well-being polls to check in with students about their satisfaction with their campus experience. Capture macro and micro insights and utilize them to inform the development of services and targeted interventions.

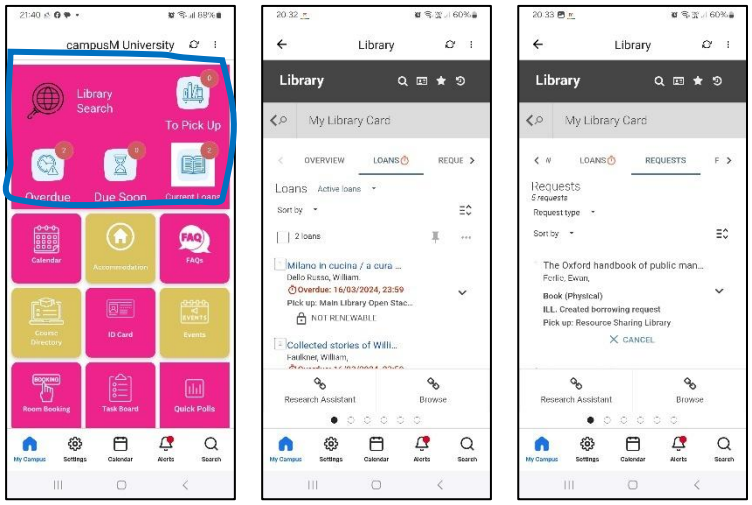


How to

Quick Polls

Provide Access to Digital Services

Use turnkey product integrations with a wide range of digital platforms that comprise students' digital campus: library, student records, email, VLE/LMS, room bookings, and more.



How to

[Library - Ex Libris Knowledge Portal]

Provide Access to Email Using the Email PI

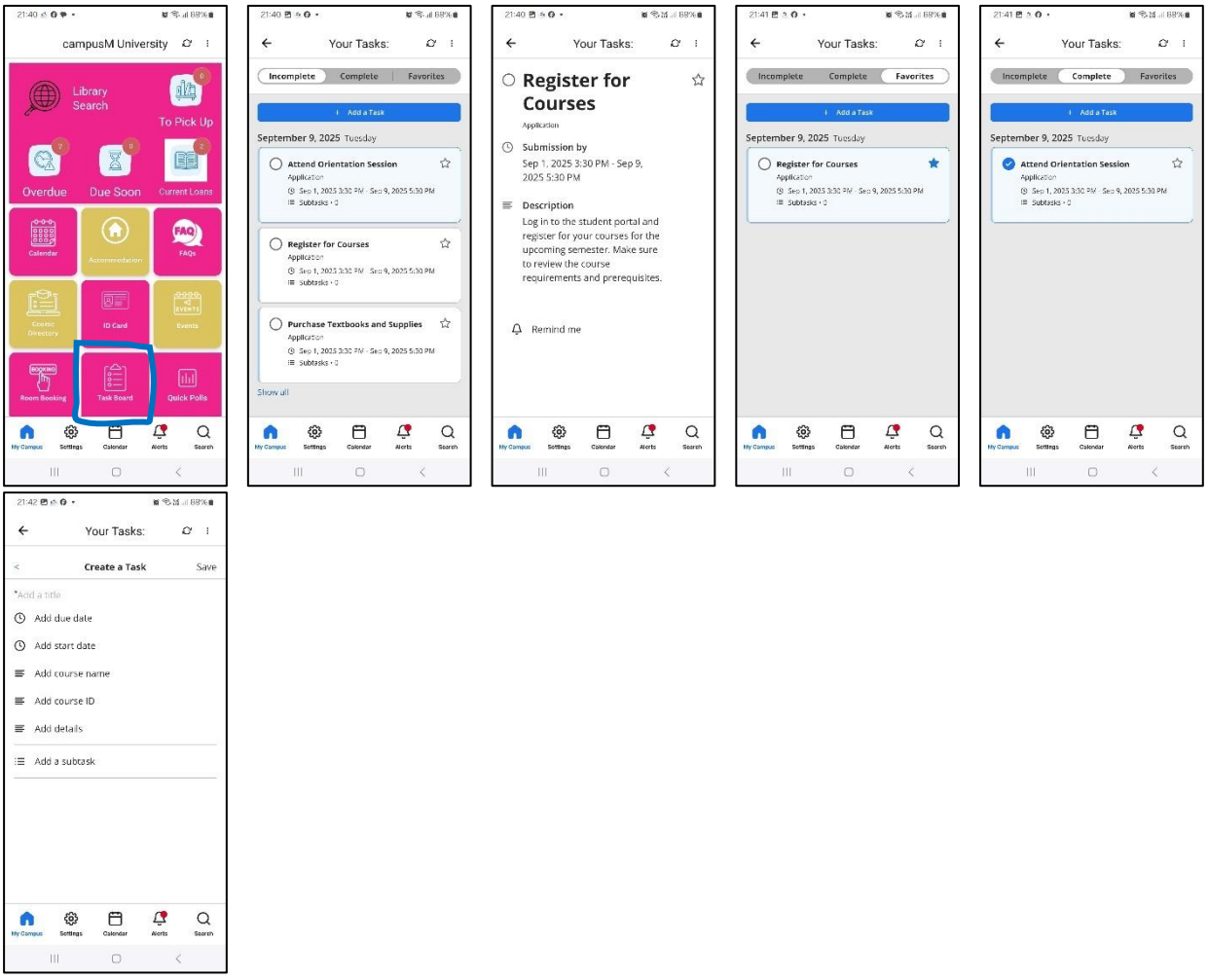
Students are not used to email. Use campusM to provide instant access to their university email without having to configure a separate mail client outside of the campusM app.

Time and Task Management Using the Task Board PI

Use the Task Board PI to provide students with a dynamic list of tasks, such as fee payments, module choices, and assessment/assignment listings.

Provide reminders of tasks to be completed.

Students can add their own tasks to the board.

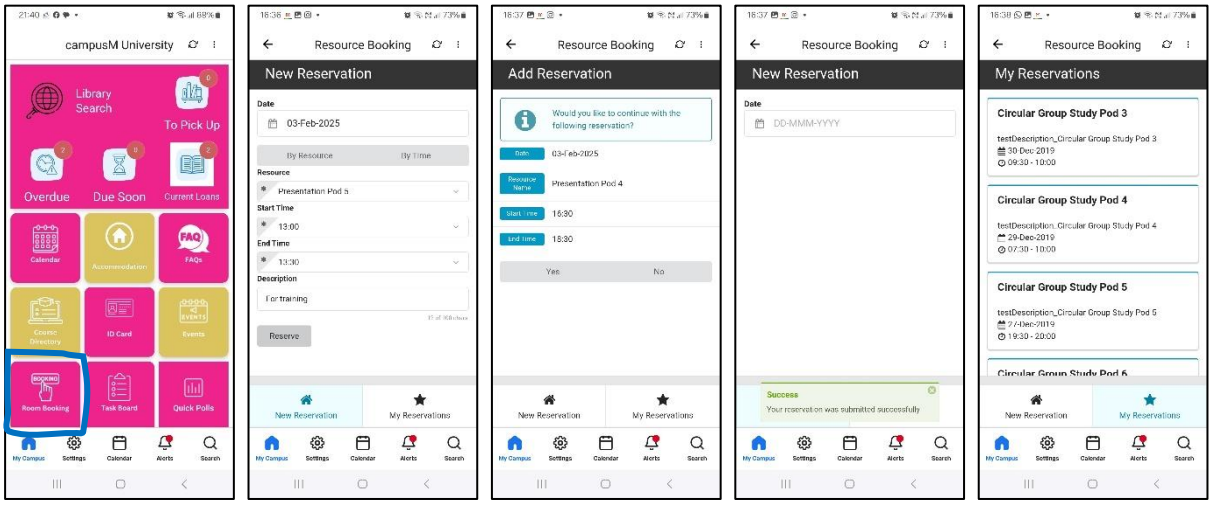


How to
Task Board - Knowledge Portal

Resource Access

Room Booking PI

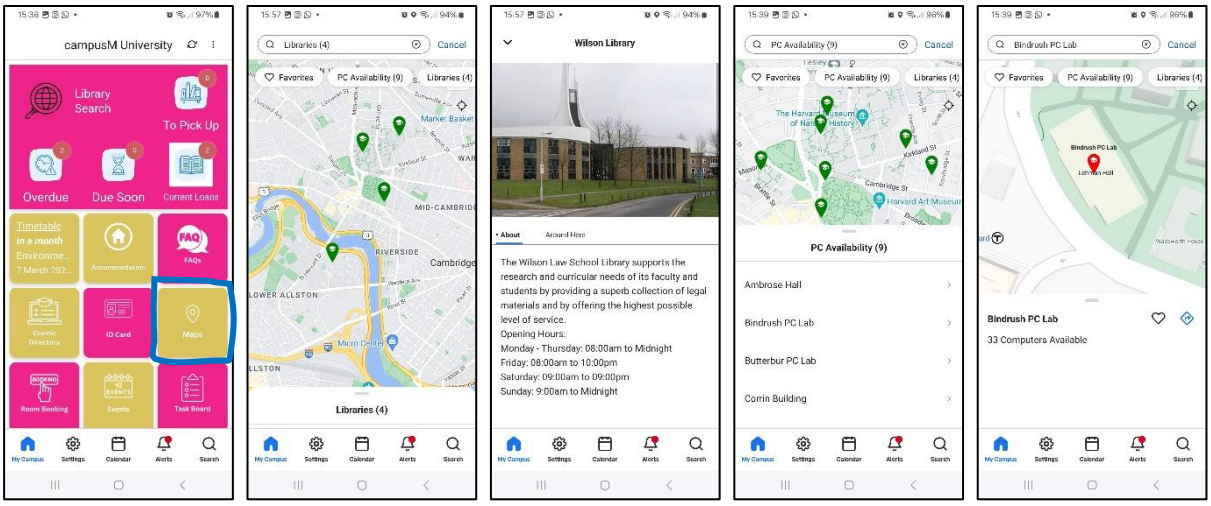
Students can book resources like Rooms and PCs in advance and save valuable time.



How to
Resource Booking - Knowledge Portal

Maps and PC Availability

Provide students with a concentrated view of the facilities available to them across campus, including access to live availability information, such as libraries, dining, and PC availability, and provide booking of facilities via the app.



How to

[Adding Maps and Locations to Services - Knowledge Portal]

Engagement Analytics

- OAS Insight Analytics Reports
- Oracle Data visualiser
- Insights API
- Understand how students are using your app throughout the day and term by reviewing usage analytics provided in Insights Analytics.
- Integrate individual transaction data from campusM into Learner analytics to derive a deeper understanding of individual student usage trends**.**

Further Ideas

Banners and Social Media Feeds

- To promote events or highlight key messages for students, place engaging marketing banners on the homepage.
- To highlight the university community to new students and engender a sense of belonging, display social media feeds directly on the homepage.

Targeted Comms Using Personalized App Notifications

- Use personalized individual or group notifications to engage students and communicate key messages to the right students at the right time.

Informational Content Pages with Creative Studio

- Create engaging content pages for students around key information about their studies and institutional policies and processes. Include photos, videos, and other types of content in the pages.

Playbook Scenario – Alumni

Overview

Section	What	Goals	Feature Highlights
Alumni	Keep graduates connected and provide career and fundraising opportunities	Maintain relationships, assist career growth, and encourage donations	• Profile & Tags • Upsell Course Directory • Alumni Events Directory • Career Outcome Polls • Careers Support

Introduction

Create a supportive and engaging experience for graduates, aiding their career development, maintaining strong connections for tracking career outcomes, and fostering opportunities for fundraising and further education through additional qualifications.

Goals

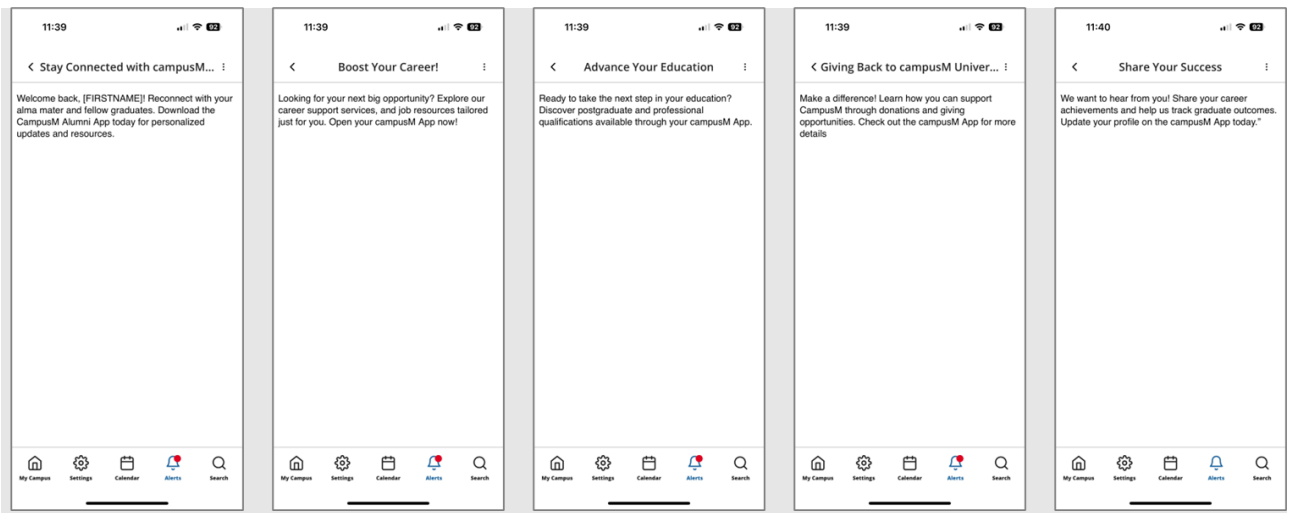
- Maintain a dynamic digital relationship with alumni through a targeted and personalized app experience.
- Highlight essential support services and resources to assist graduates in securing optimal job opportunities.
- Provide a platform to offer postgraduate and professional qualifications tailored to the needs of alumni.
- Promote opportunities for alumni to support their alma mater through donations and other forms of giving.
- Facilitate the collection and analysis of graduate outcomes to measure and enhance career success.

Feature Focus

New Alumni Notification Campaign

When alumni first sign into the app, welcome them with engaging and timely prompts.

To enhance their experience, highlight the app's features and the valuable services it offers.

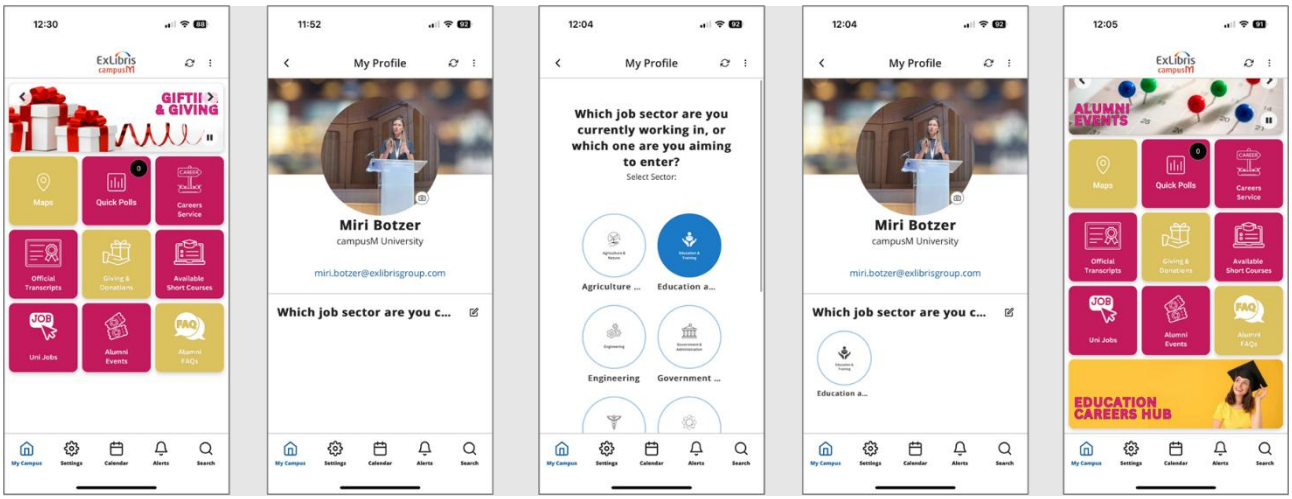


How to
Notifications Training

Sending Notifications to End-Users - Knowledge Portal

My Profile and Tags

Leverage the Tags and My Profile features to gather metadata on alumni career focus and preferences. This enables the delivery of a personalized experience tailored to each alumnus's unique interests.

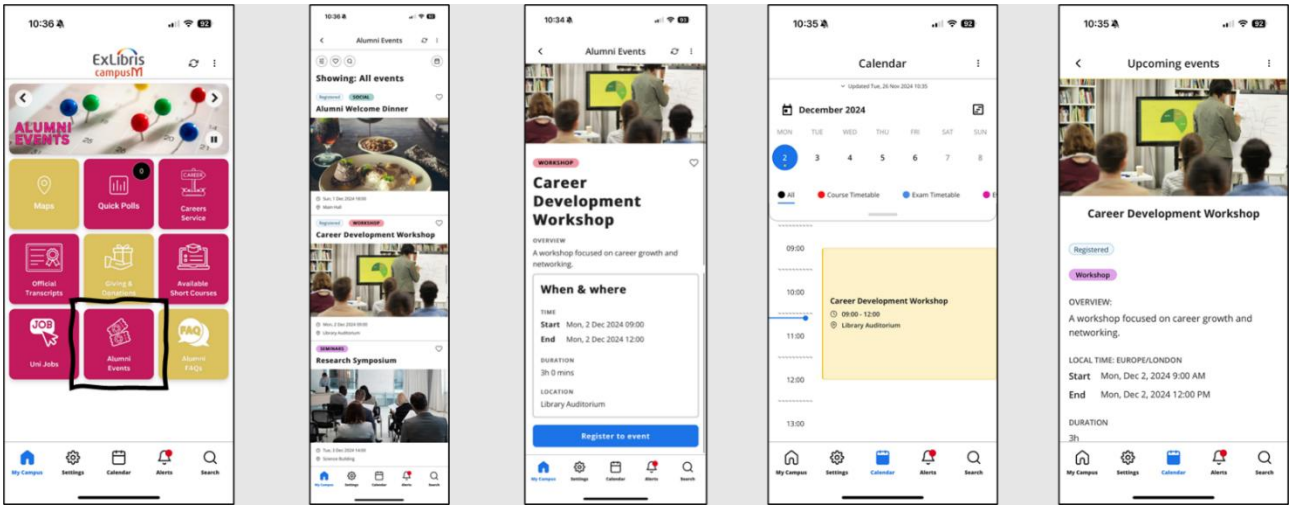


How to
Tags and My Profile Training

Tags and My Profile - Knowledge Portal

Alumni Event Directory

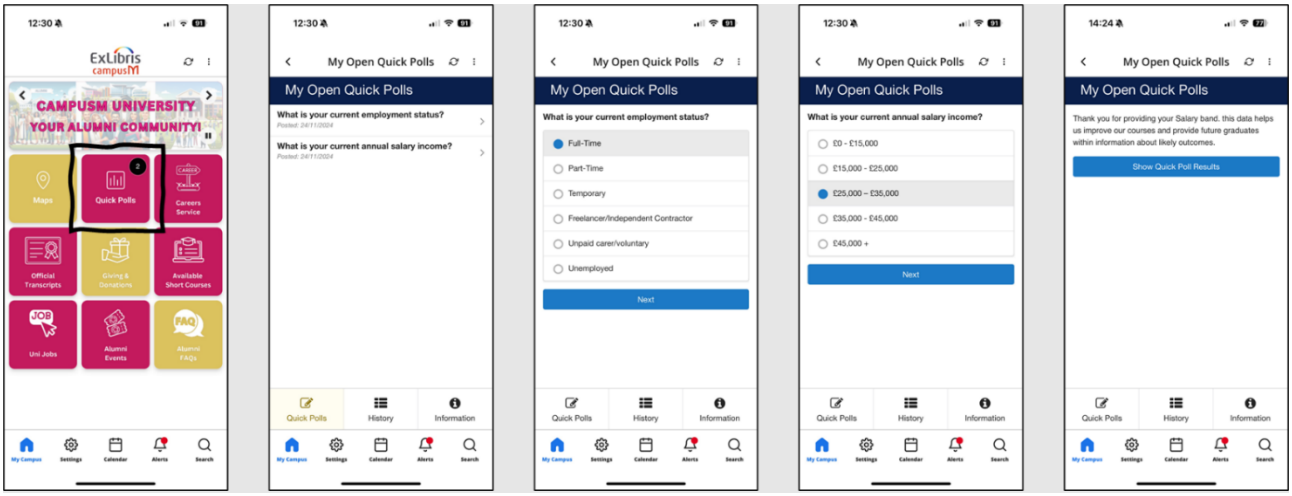
Create an engaging search and discovery experience for alumni to highlight and promote events that will enrich and enhance their post-graduate journey.



How to
Events - Knowledge Portal

Poll Alumni to Capture Key Information About Former Students

Capture key information from your alumni to use in reporting of outcomes and to help shape their experiences outside the boundaries of the school.

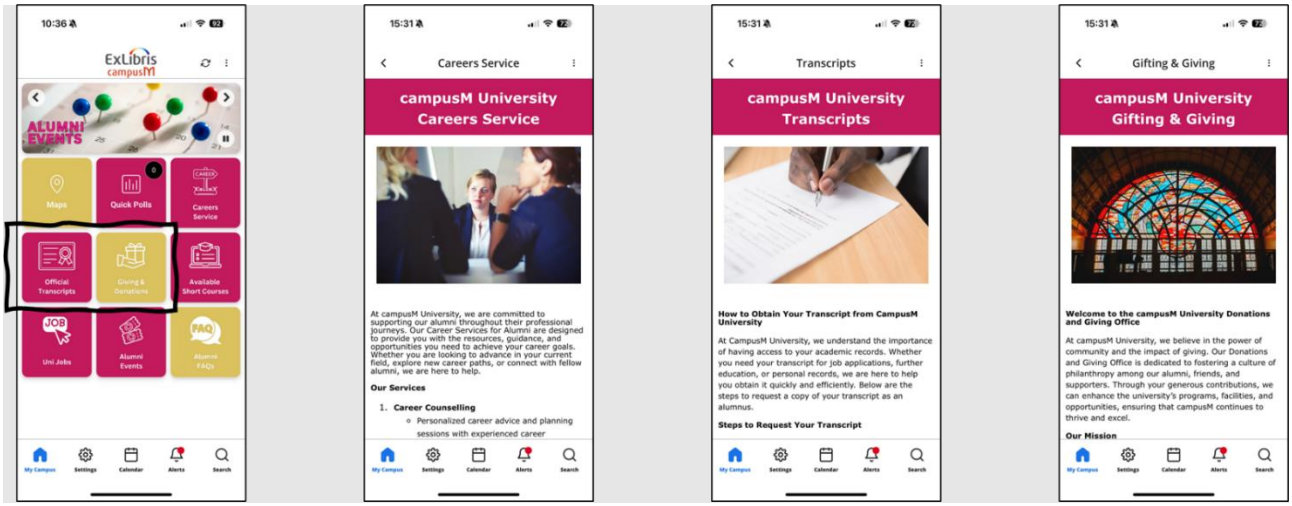


How to

Quick Polls - Ex Libris Knowledge Center

Tailored Content for Alumni

Create engaging content pages for alumni about services and donation opportunities available to them.

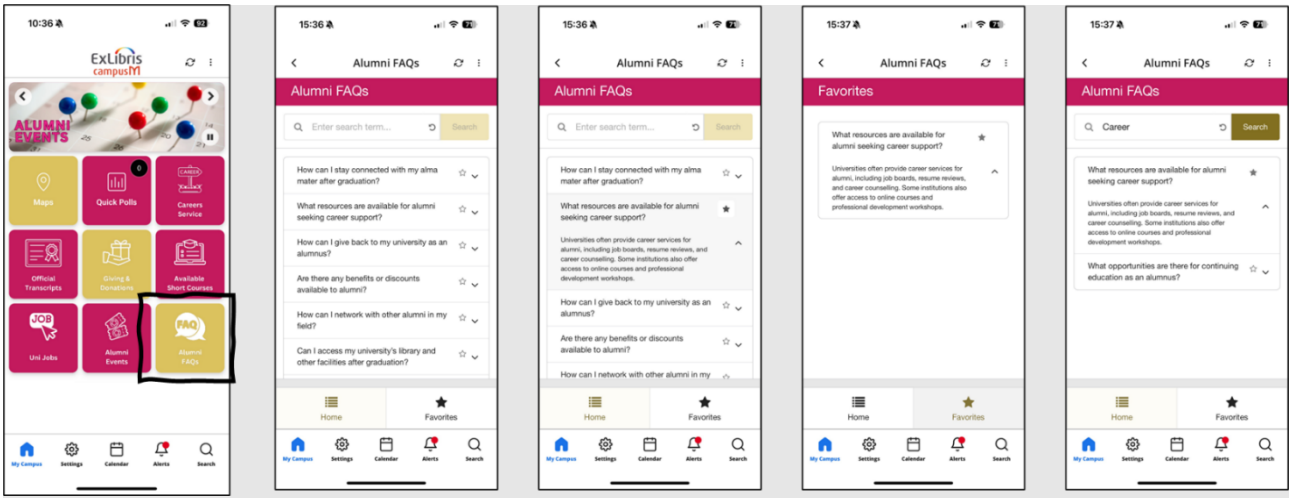


How to

Managing Creative Studio - Ex Libris Knowledge Center

FAQs Using List PI

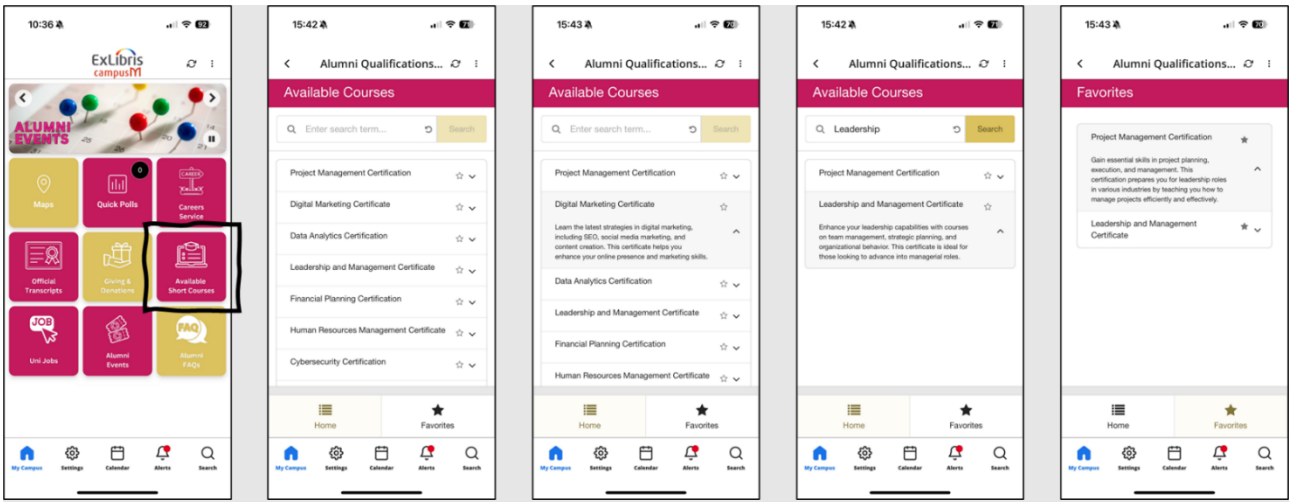
Provide a static or dynamic list of searchable FAQs that provide support to alumni.



How to
List - Knowledge Portal

Upselling Professional Courses to Alumni Using List PI

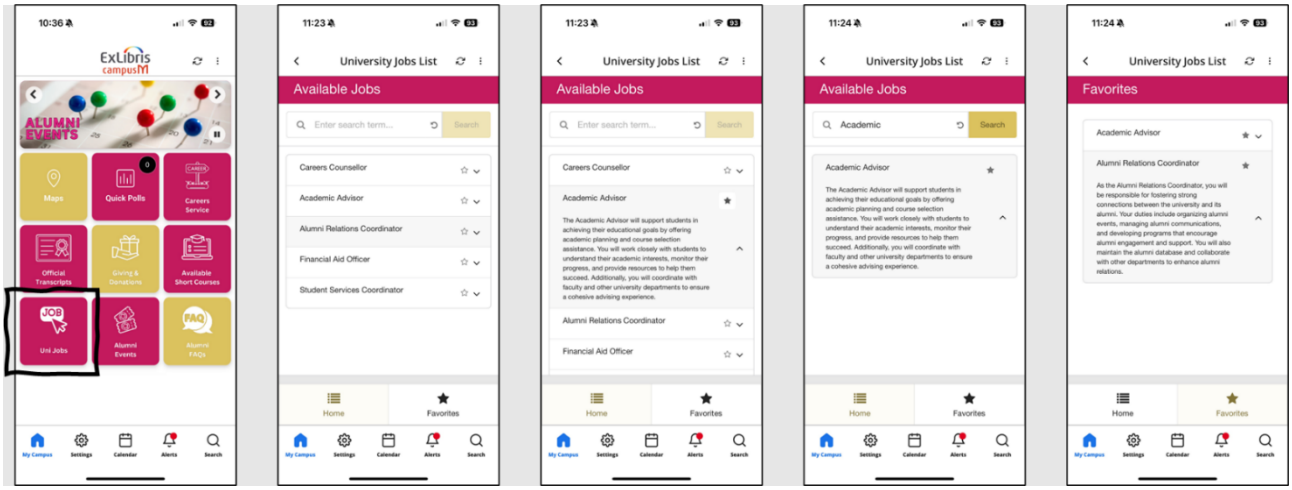
Provide a searchable static or dynamic list of courses to upsell programs to alumni.



How to
List - Knowledge Portal

Promote University Career Opportunities to Alumni Using List PI

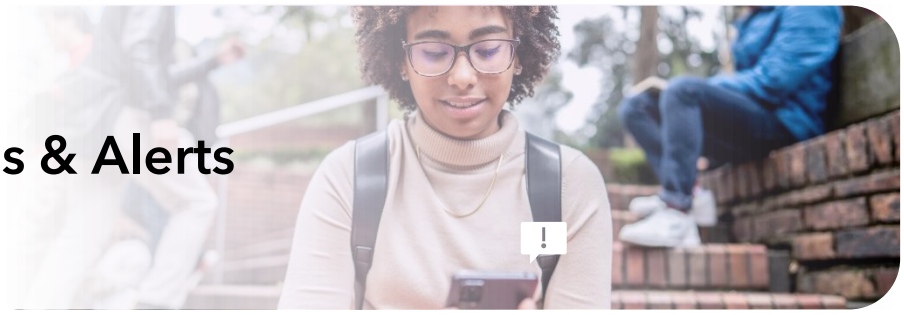
Provide a searchable static or dynamic list of jobs to market available careers at the university to alumni.



How to

List - Knowledge Portal

Notifications & Alerts



Overview

Notifications are a great way to communicate with your students, and to get the word out about, well, anything! If you want to promote an on-campus event, send a registration reminder, or just let your users know that a certain parking lot will be closed for repairs, notifications are one of the most powerful tools in your arsenal.

Before we begin, let's review the needs and wants of your institution and of your students:

As an ***institution sending notifications,*** *my* ***goal*** *is...*	To provide easily accessible, clear, and timely information to students.
	To have a the largest percentage possible of the students who received the notification to also read it.
	Use notifications to drive app usage and overall engagement.
As an ***institution sending notifications,*** *I want to* ***avoid****...*	Overwhelming students with large amounts of irrelevant information (i.e, spamming).
	Students opting out of notifications by revoking Push Notification permissions.
As a ***student, getting notifications,*** *my* ***goal*** *is...*	To recieve information from my institution that I am either interested in or need to know.
	To stay informed on what's going on around me on campus.
As a ***student, getting notifications,*** *I want to* ***avoid****...*	Getting too many notifications, and missing important information.
	Getting irrelevant information that isn't helpful.

In this Notifications and Alerts section, we'll cover the following areas:

- Push Notifications, Alerts, Reminders – What's the Difference?
- Methods of Sending Notifications
- Grouping and Targeting
- Best Practices for Group Notifications

Push Notifications, Alerts, Reminders – What's the Difference?

While these three terms are often used interchangeably, they are in fact different.

A **Push Notification** is a generic term for the notifications received on a mobile device. Specifically, these are the notifications that appear in your lockscreen, or when dragging down the top bar of your device. Most apps use push notifications to engage their users and to encourage them to enter the app.

Reminders are a type of push notification, which is defined by its time-sensitive nature. These are often used in scheduling apps to remind you of an appointment, or an upcoming event. Once reminders are dismissed by a user, they are permanently gone. In campusM, reminders are used for events that appear in the campusM Calendar (from the Timetable, Events, Task Board, Canvas and Blackboard Product Integrations), and for Attendance reminders.

Alerts are a campusM-specific term, which describes the messages a user sees in the "Alerts" section of the campusM app. These messages generate a push notification, which while dismissible, the information in the Alert is accessible for up to 90 days later in the app if the user dismisses the push notification. The Alerts icon on the bottom Navbar of the app will have a badge indicating if there are unread Alerts. Alerts may also be accessed via the campusM web app, though they do not generate a push notification through the browser.

In short, while both Reminders and Alerts generate Push Notifications, they are fundamentally different entities. In this chapter, which discusses campusM Alerts exclusively, the terms "Notification", "Push", "Push Notification" and "Alert" will be used interchangeably.

Methods of Sending Notifications

All the methods described below can be used individually or together in any combination.

Notification Center

Description: campusM's Notification Center is the App Manager interface for managing sending and notifications in campusM. It can be used to compose and schedule notifications, quickly view engagement numbers for past notifications, and manage notification groups (discussed more deeply in the Grouping and Targeting section below).

Pros & Cons: While it can technically send notifications to both groups and individuals, it is mainly useful for sending notifications to groups of users, as individualized notifications quickly become impractical when the need for scale arises. It is the most popular way to manage notifications, as it requires no setup, and can be handled by anyone with the right App Manager permissions in place.

For more information on campusM's Notification Center, see our documentation.

New User Registration Campaign

Descriptions: The New User Registration Campaign is also managed in the Notification Center, but it covers a special use-case as it is designed specifically to target new users as they start using the app. This allows campusM admins to configure a series of notifications to be sent to a user at predetermined intervals after their registration to the app under a certain App Profile (read: first time logging into campusM).

Usage Example: This is a great option to use for welcoming new users onto the app and introducing its many features one at a time. For example, a day after registration, a notification can be sent welcoming the student into the app and asking if they've browsed the on-campus events yet. Another notification 2 days later can ask the user if they've finished their onboarding to-do list yet. A third and final notification can ask the user for feedback on the app, 7 days after registration.

For more information on the New User Registration Campaign, see our documentation.

BCC Email Notifications

Description: This feature allows campusM admins to turn an email into a notification for all valid user emails found in the To and CC fields of that email. This is a great way to turn emails that students never read into notifications that have a better chance of getting their attention.

Usage Example: This is ideal for any existing systems that already send students automated personalized emails, as this requires little-to-no technical setup. For example, if a user gets an email reminding them to return an overdue library book, adding the campusM email to the BCC field of that email automatically sends a notification on the campusM app as well.

For more information on BCC Email Notifications, see our documentation.

API Notifications

Description: API Notifications are a great way for the technically-capable customer to get the most out of campusM's notifications. Targeting and Grouping works in a similar way to that of the Notification Center in App Manger, allowing for individualized notifications as well. The automation of the API method allows for sending hyper-personalized notifications at scale,

Pros & Cons: While this requires a lot of technical knowledge to set up and maintain, it's the most efficient way to integrate outside-systems with campusM notifications.

For more information on API Notifications, see our documentation.

Grouping and Targeting

As we will explain in the Best Practices section below, Grouping and Targeting is one of the most important things to get right when it comes to notifications! It's essential to make sure that the audience matches the message you're sending out to avoid providing irrelevant or misleading information, and to prevent accidental spamming of your students.

Note: *In most cases, notifications can only be sent to authenticated users. Anonymous users only receive notifications in two cases:*

1. *As part of an All-Users group (see below for details)*
2. *When sending a notification to the Default role of an anonymous profile.*

An Individual/A List of Individuals

Description: Targeting a notification at a single individual user (or a list of users) is the most extreme case of personalizing notifications. A notification targeted for a specific student is practically guaranteed to be relevant specifically to them, and, therefore, the open rates for such notifications tend to be higher than those of notifications sent to groups.

Usage Example: A student can receive a notification when one of their assignments receives a grade.

Pros & Cons: It's important to note that hyper-personalized notifications of this type are often hard to send at scale through manual methods like Notification Center, and tend to be most impactful via automated methods, such as BCC Email and API.

Notification Groups/Channels

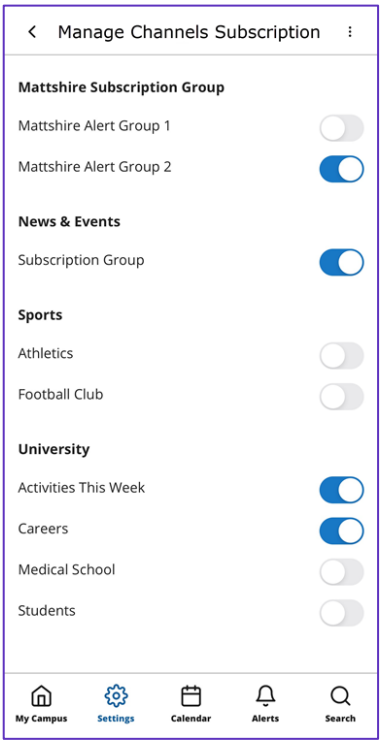
Description: Users may also be conveniently segmented for communications purposes by configuring notification groups in Notification Center, which can also be used through the API method. Notification Groups are organized into Categories, which can be assigned to users according to their App Roles. This is the most common way to target large groups of users for larger scale notifications.

Usage Example: A notification to announce a scholarship opportunity for students in the School of Chemistry.

For more information on Notification Groups, see our documentation.

Subscription to Notification Channels

Description: Each Notification Group can be configured to either allow or disallow users from opting out of that group. In the app, this is called "Channels Subscription" and is found in the Settings page. While institutions may be apprehensive to allow students to opt out of communications, we recommend allowing this where it makes sense, as it provides users with a sense of control and they will be less likely to disable push permissions for all notifications if they can opt out of those that don't interest them.



Usage Example: A student that uses the on-campus housing options (a Notification Group Category), may be interested to know about maintenance being done in their building (a Notification Group), but not interested to hear about the weekly movie-nights (another Notification Group).

For more information on Subscription to Notification Channels, see our documentation.

Roles

Description: To send notifications by App Roles without having to pre-configure a group, you may also send an Advanced-Role Notification through the Notification Center. Through this method, admins may also send notifications to users who have a certain App Role, a combination of App Roles (Role A AND Role B), or to users who have one App Role but not another (Role A AND NOT Role B). This is great for targeting that's more precise than your roles could anticipate, and that is only relevant to a specific subsection of students.

Usage Example: A notification about an elevator in the Arts Library being out of order can be sent to a subsection of students that belong to the Arts Library (Role A) AND have a physical disability (Role B).

"All users" groups

Sending notifications to all app users may be desirable if there is a campus-wide announcement, or an update about the app itself. There are two methods institutions can use to send notifications to all app users:

Notification Group "ALL"

The "ALL" Notification Group is created automatically for all campusM institutions, and every user is added to it when they log into the app for the first time. However, unless institutions request that users are deleted, this group will include inactive users who may no longer have the app installed. Using the ALL group in such a case will lead to inflated recipient numbers and artificially small engagement rates, as the notification may not reach all users in the group.

All Active Users

This option allows the admin to create a dynamic group of all users that have been active recently, between 1 and 365 days back. We recommend using this option for two main reasons:

1. The notification's recipient count is much more accurate to the reality of how many users will actually receive a push when compared with the ALL group, and engagement rates will rise accordingly.
2. Due to Android's limitations, Android users who haven't been active in 270 days will not receive a notification to their device, as they will not have a valid Push Token. Similar limitations exist in iOS, but there is no official documentation on expiration. Limiting your push notifications to active users avoids sending notifications to users who couldn't receive them anyway.

Best Practices for Group Notifications

In April of 2026, the campusM R&D team performed an analysis of 1 year's worth of notification data, and found 5 guidelines for sending Group Notifications. You can read the full report describing the math behind some of these guidelines, here.

Target Your Message

What Does the Data Say?

- **Institutions with high-performing notifications** were far more likely to send notifications to **groups of all sizes**. These groups could be as small as dozens of students, or as big as tens of thousands.
- **Institutions with low-performing notifications** were far more likely to send notifications exclusively to larger groups of several thousand to tens of thousands of students, and they **tended not to vary the size of their target groups**.

The Rationale

Targeting your message has several benefits that help overall notification engagement. Firstly, sending your message to the relevant people reduces the chance of accidentally spamming any one user with too many notifications. Furthermore, as the number of recipients goes down due to more precise targeting, there's more of a chance that the information will actually be relevant to the user at the other end. Most importantly, targeting your message trains your students over time to expect that when their institution buzzes in their pocket – they should probably listen, as it is probably relevant to them.

💡 Example	❌ Don't	✅ Do
One of the campus parking lots will be closed this week for repairs.	Send a notification to all students on campus.	Send a notification to all students with a relevant parking permit.

Title Composition

What Does the Data Say?

When analyzing the titles of the top-performing 100 notifications of this dataset we found that a vast majority followed these rules:

- **Short and Sweet** – the median notification title was 39 characters long.
- **Call to Action (CTA)** – these notifications featured a clear CTA, which was often also indicated as time-sensitive by use of words like "urgent", "today", or "final".
- **Informative Emojis** – emoji use was high. Emojis indicated either urgency (e.g. " ⚠️ "), or the contents of the notification (e.g. " 🎭 " indicated a theatre-related notification).

The Rationale

Whether a notification is viewed or not is often a split-second decision, that most users aren't even aware they are making. As your students' attention has never been at higher demand, and your notification is one of many stimuli asking for it at any single moment, optimizing your Notification Titles for quick cognitive processing may give you a leg up. Making the title short and to the point, with a clear signifier of importance/urgency as needed is the best way to improve your notification's chances at being opened rather than being dismissed.

💡 Example	❌ Don't	✅ Do
Composing a title for your notification about stargazing night for students hosted by the physics department.	"All students are invited tonight at 8PM to stargaze with our Astronomy expert, Prof. Smith" (90 char)	" 🪐 Come stargazing tonight at 8PM!" (35 char)

Quality Gatekeeping

Many stakeholders want to send notifications to students. To avoid accidental spamming, and enforcement of best practices, we suggest having **a single human strategic gatekeeper for notifications.** Their main job is to ask the three following questions of any notification request that comes through:

1. **Can this be targeted better?** See "Target Your Message" above.
2. **Can this be worded better?** See "Title Composition" above.
3. **When should this be scheduled?** While stakeholders may assume that notifications can go out immediately, it's better to plan your communications to avoid all the departments sending out their messaging at the same time.

💡 Example	❌ Don't	✅ Do
The Dean of Students, the Finance department and the Student Union have all asked for a notification to be sent.	Send all three notifications immediately without question.	Ask for more information to suggest a more precise targeting and inform them of how their notification will fit into the planned weekly schedule.

Performance Benchmarks

What does the data say?

The number of users who read a notification increases when increasing the number of recipients for that notification – but not in a linear fashion. A notification that goes out to a larger group of recipients has a lower rate of engagement than one that goes out to a smaller group - but still has a higher number of overall readers. This simply means that not all notifications are the same: **a notification's expected performance changes depending on its number of recipients**.

We've done the math and worked out some useful benchmarks of notification performance based on number of recipients and engagement quartiles – though it's important to remember that no institution is the average institution, and your results may vary. Use the campusM Notification Benchmark Calculator to determine your notifications' success in comparison to similarly sized notifications from other institutions.

Other Measures of Success

Engagement/number of Readers is only one measure of success! If you want to measure increase in app sessions after a notification, or a target number of page views for a certain page after a notification – these can be easily measured in campusM Analytics. For example, if you'd like to promote the university's library services, a good measure of success might be the number of clicks on the Primo Tile or the number of Views for Primo Search pages in the app.

For more information on campusM Analytics, see our documentation.

💡 **Example**	❌ **Don't**	✅ **Do**
Planning a new notification strategy for the university.	Set a flat 15% engagement rate goal for all notifications.	Define a notification's success by your business goals and the number of recipients it has.

Focus on What Matters

What does the data say?

Now that we've covered all the things that do matter, here are all the things we found **don't** have a measurable effect on notification engagement, and we advise you not to worry about them too much:

- Day of the week a notification was sent.
- Time of year a notification was sent.
- Number of notifications sent overall.
- How often you send notifications – so long as you're consistent.

So long as you keep your notifications relevant, and time them in relation to their respective contexts – and you follow the guidelines mentioned above – your notifications should do perfectly fine.

About Clarivate

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