

Office of the Provost

# Pathways Training Documentation

For Advisors

Pathways Team 4-25-2023

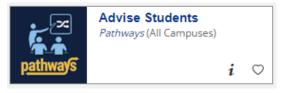
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# How to Log Into Navigate

 Find the "Advise Students" resource on my.pitt.edu. This is the live site, so use this site for setting up availability, completing notes and reports, and messaging students.



- 2. Chrome works best. If you have trouble access either site, please contact <u>PathwaysHelp@pitt.edu</u> for assistance.
- 3. Once you click the link, you will be directed to Pitt Passport to log in. Use your Pitt Passport credentials to log in.

Pitt Passpo	ort
Username	
Enter username	
Password	
Password	

Forgot password? | O Need Help?

If you are having problems logging in with Pitt Passport please contact CSSD's Help Desk at 4-HELP or <u>helpdesk@pitt.edu</u> for assistance.



# How to Search for a Student

1. To search for a student, simply click on the "Quick Search" box in the center of the screen



2. Type in the name of a student and select the student to view their home page.





Calendar

# How to Sync Your Calendar SYNC YOUR CALENDAR ONLY IN THE PRODUCTION SITE

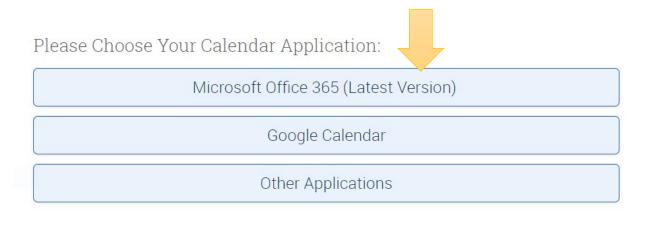
- 1. Click on the Calendar icon on the left hand side of the screen.
- 2. On the right hand side of the screen, click on the Settings and Sync button.



3. On the next screen, click on the Setup Sync button.

Last Sync: N/A	
Setup Sync	

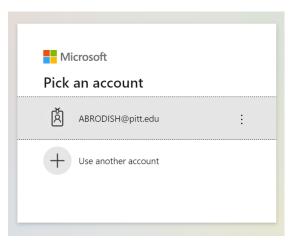
4. You will be prompted to select your Calendar Application. Click the Outlook Service Accounts button. This is the only ways your calendar will sync correctly.



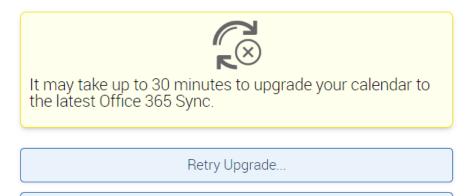
Go back...



5. Then choose your account.



6. After signing in, you will see a yellow banner at the bottom right of the screen indicating that sync was successful and you'll see the screen below.



Disconnect Sync...



# How to Set Your Availability in Navigate

Set up your availability in Navigate so that students can schedule appointments to see you. It's important to note that locations and services are created by university administrators.

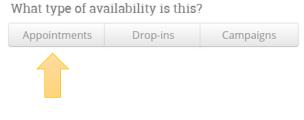
 Click on the My Availability tab. Under Available Times, Go to the Actions menu and select Add Time

Staf	f Home New		
Students	Upcoming Appointments	My Availability	App
Availa	able Times o		
Actions 🔺			
Add Tin Copy Ti	DAYS IF WEEK	TIMES	C
Delete 1	ïme		

2. Select the days and times when you are available to meet with students. Determine how long the availability is active: for a term, a range of dates, or forever.

When	are you	ı availa	ble to r	neet?			Í
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
From			То				
8:00am			5:0	0pm			
All times I	isted are ir	n Eastern Ti	ime (US &	Canada).			
How long	is this avai	ilability acti	ve?			4	. 1
	elect a dur						

3. Select the type of availability. Selecting appointments will allow students to schedule appointments with you via your personal availability link or on the app.





4. Determine if you want to have this availability associated with your Personal Availability Link. If yes, click on the box. If no, leave it unchecked.

### Add to your personal availability link?

Add this availability to your personal availability link?

- 5. Select the type of meeting (in person v. virtual) that you want to make yourself available for.
  6. Choose the care unit from the drop-down menu: <u>Care Unit</u>.
  7. Choose the location where you are available from the drop-down menu: Location.
- 8. Select which type of appointment(s) for which you are available in Services: <u>Service</u>.
- 9. If it applies, you can add a URL or phone number for virtual appointments.
- 10. Add any special instructions for student.
- 11. Select the number of students per appointment.
- 12. Click the Save button.
- 13. Repeat this process until all of your availabilities have been defined. You can have as much availability as you need!

**Tip:** Use the Special Instructions to Students box to include personalized information such as office number and/or directions. E.g.,

### If you chose an "In-Person" appointment:

Appointments will take place [your office number].

### If you chose an "Virtual" appointment:

Please make sure you are on a computer and are logged into my.pitt.edu. Please use my Zoom room link: [your Zoom room].



Please select Meeting Types			
Care Unit			
Please select a care unit			~
Location			
Please select a location			~
Services	4		
Please select services			
URL / Phone Number	1		
Special Instructions for Student			
<b>B</b> $I := \frac{1}{2} \Leftrightarrow \Rightarrow$			
e.g. room 23, please bring paper			
Will you be meeting wit	h mult	iple s	students?
These settings will not be used for kiosk ar	nd campaign	purpose	PS.
Max Number of Students per Appoi	ntment		
1			
	Cance	el	Save

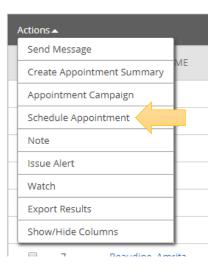
# How to Schedule an Appointment

# Current Alerts 🧿 I want to... Message Student Add a Note on this Student Add a To-Do to this Student Report on Appointment Create Request for Appointment Schedule an Appointment Add to Student List Issue an Alert

Schedule Appointment

1. If you have students assigned to you, check the box of the student you want to make an appointment with and select Schedule Appointment.

2. If you don't have students assigned to you, use the Schedule an Appointment link from the student's page. The process below is the same.



### 3.

Filters

Care Unit Select a Care unit

Location

Service

Course

Meeting Type Select meeting type

Comments

Select a Date

0

Su

3

10

17

24

Мо

4

11

18

25

Tu

5

12

19

26

27

28 29 30

### People Attending (1) Watson, Jessica Lynn Available Slots Left in Appointment (0) --Please Select care unit to select location Save Appointment Cancel \* Select a location to select service Q Select Care Unit: Care Unit -Select Location: Location Select Service: Service Select Meeting Type: In-person v. virtual If appropriate, select the Course if needed 0 April 2022 Sa We Th Fr If desired, Comments could be added 1 2 8 6 9 13 14 15 16 20 21 22 23



4. Click the radial button next to your name as the organizer.

Select An Organizer

0	Kemp, Alicia	For: Appointments/Drop-Ins/Campaigns Mon-Fri 8:30am-3:15pm
SELECT	ORGANIZER	AVAILABLE TIMES

- 5. After an organizer is selected, a scheduler will appear that has both the availability of the advisor and any conflicts with the student's schedule.
- 6. Choose a length of time for the appointment.
- 7. If an appointment is available, that appointment will display with a small green box that will need to be checked to select it.

Choose A Time To Meet						
Length:				Availabilities: ?	Show Availabilities	for This Course/Service 🔻
TIME SLOT 01/27 (SUN)	01/28 (MON)	01/29 (TUE)	01/30 (WED)	01/31 (THU)	02/01 (FRI)	02/02 (SAT)
6:00am - 6:30am						A
6:30am - 7:00am			CONFLICTS			
7:00am - 7:30am		CONFLICTS	CONFLICTS			
7:30am - 8:00am		CONFLICTS	CONFLICTS			
8:00am - 8:30am		CONFLICTS	CONFLICTS			
8:30am - 9:00am	DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	0/1	DP-IN
9:00am - 9:30am	DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	0/1	DP-IN
9:30am - 10:00am	DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	0/1	DP-IN
10:00am - 10:30am	DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	0/1	DP-IN
10:30am - 11:00am	DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	0/1	DP-IN

### 8. If needed, you can toggle the "Availabilities" to unlock additional times for the appointment.

Availabilities:?	Show Availabilities for This Course/Service 👻
	Show Availabilities for This Course/Service
08/17	Show All Availabilities
(WED)	Unlock Non-Available Times
	Unlock Times With Conflicts

9. Click Save Appointment

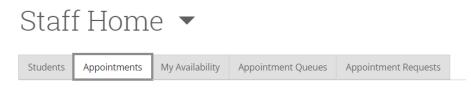
Save Appointment Cancel



# How to Complete an Appointment Summary Report

An Appointment Summary Report works like the notes you take on your advising appointments. It allows you to document advice or next steps that you have given to your student. Appointment Summary Report is used to document interactions *with* a student.

1. From your home screen, select the Appointments tab.



2. For current or upcoming appointments, scroll to the Upcoming Appointments section.

Upcor	ning Ap	pointment	S	
Care Unit:	All care units	•		
<u>Actions</u>				
		DATE/TIME	ATTENDEE	
For past an	nointmonte	scroll to the Pe	cont Annoin	tm

3. For past appointments, scroll to the Recent Appointments section.

Recent Appointments

Care Unit:

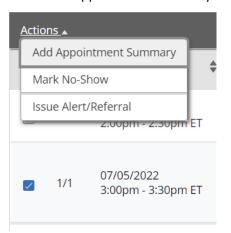
All care units

Actions.

DATE

SERVICE

4. Select a student for whom you would like to create an Appointment Summary and under actions select "Add Appointment Summary".





### 5. Fill in the information needed to complete the Summary Report

Appointment Details 🕦	Summary Details For R	
Appointment	Type of referral made Objectives of the Session	n
11/15/2018 4:00p-4:30p - ENGR- Academic/Career 🔻	•	
Care Unit	Study Skills Used Goals For Next Session	
Advising	Study Skills Used Goals For Next Session	
Location		
School of Engineering	Did the student attend at least one university event in the last month?	○ Yes ○ No ○ N/A
Service	Did the student attend at least one school or department event in the last month?	○ Yes ○ No ○ N/A
× ENGR- Academic/Career Decision	Has the student participated in a mentoring/networking opportunity?	⊖ Yes ⊖ No ⊖ N/A
Course	Is the student participating in a club or organization?	⊖ Yes ⊖ No ⊖ N/A
Start typing to search all courses	Is the student involved in community service activities?	● Yes ● No ● N/A
Meeting Type	Appointment Summary	
Select Meeting Type	B I ☷ ≧ 🖉 Paragraph 👻 🦘 🏕	
Date of visit		
11/15/2018		
Attendees	Did you know?	
Attondooo	Did you know?	
Jill Harvey	• You can upload a file as an attachmen	t to the report.
Advisor	•	•
✓ Attended	The Yes/No questions are not required to	save the report
Ryan Adelsberg - 4270150		
Freshman Undeclared		
Freshman Undeclared Attended		
Freshman Undeclared Attended		
Freshman Undeclared Attended Checkin Checkout 3:11pm to 3:11pm		4
Freshman Undeclared Attended Checkin Checkout 3:11pm to 3:11pm Suggested Followup	Attachments	
Freshman Undeclared     Attended Checkin Checkout	Attachments © Attach File	A
Freshman Undeclared Attended Checkin Checkout 3:11pm to 3:11pm Suggested Followup This will be saved on the report as a suggestion. No		ġ.

6. Once complete click Save this Report.

Save this Report

7. The Report Filed? column will change from Not Yet to Report Details in the Recent Appointments section.





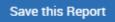
# How to Complete an Appointment Summary Report without an Appointment

1.	To search for a student, simply click on the "Quick Search" box in the center of the screen	Quick S	earch	
2.	Type in the name of a student and select the student to view their home page.	ne	-	ntson Inn Watson Innistration)
3.	Under Actions off to the right, click on the you the options and select "Report on App	-	-	Current Referrals       0         I want to       I want to         Message Student       I want to         Add a Note on this Student       I want to         Add a To-Do to this Student       I want to         Report on Appointment       I want to         Create Request for Appointment       I want to         Schedule an Appointment       I want to
4.	Fill in the information needed to complete Report	the Sumr	mary	Add to Student List



Appointment Details 🜖	Summary Details For Ryan Ac	delsberg	
Appointment	Type of referral made	Objectives of the Session	
11/15/2018 4:00p-4:30p - ENGR- Academic/Career 🔻			
Care Unit	Study Skills Used	Goals For Next Session	
Advising -		Goals for Next Session	
Location	Did the student attend at least one univer	rsity event in the last month?	Yes No N/A
School of Engineering 💌	Did the student attend at least one school		Yes No N/A
Service	month? Has the student participated in a mentori		0 0 0
× ENGR- Academic/Career Decision	Mas the student barticibated in a menton	nemetworking opportunity:	Ves O No O N/A
Course	Did	you know?	
Start typing to search all courses			
Meeting Type	•	ile as an attachment to	•
Select Meeting Type	<ul> <li>The Yes/No questions</li> </ul>	s are not required to sa	ave the report.
Date of visit			
11/15/2018			
Meeting Start Time Meeting End Time			
4:00pm to 4:30pm			
	Select Care Unit: Ca	<mark>re Unit</mark>	
Attendees			
Jill Harvey	Select Location: <u>Loc</u>	<u>ation</u>	
Advisor	Select Service: Servi	ce	
Attended			
Ryan Freshman	Course: Not require	<u>d</u>	
Undeclared	Select Meeting Type	e: <u>In-person v. virtual</u>	
<ul> <li>Attended</li> </ul>			
Checkin Checkout			
3:11pm to 3:11pm			
Suggested Followup This will be saved on the report as a suggestion. No appointment will be created. Date Time	Attachments Attach File Choose File No file chosen		

5. Once complete click Save this Report.



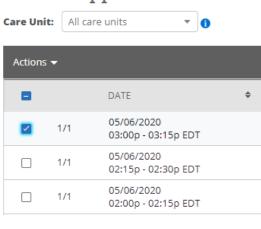


# How to Mark an Appointment as a No Show

1. Scroll down to your Recent Appointments

Reporting						
Recent Appointments	Recent Reports You Created					
Recent App Care Unit: All care u						

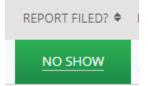
2. Click on the box next to the appointment you want to mark as a No Show.



- **Recent Appointments**
- 3. Open Actions button and select Mark No-Show



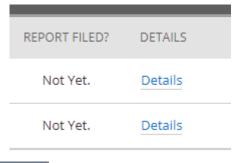
4. An Appointment Summary will open. You can add a note or simply close it. A green No-Show box will show in the Report Filed column





# How to Cancel an Appointment

1. From your Upcoming Appointment tab on your Staff Home page, click on the Details link for the appointment you want to cancel.



2. This will bring up the appointment details. Click Cancel Appointment in the bottom let. **Do not click** on Delete Appointment.

MANAGE APPOINTMEN History General Ad All Attendees	Appointment Details	
⊥ You (Organizer) ⊥ Donna Sonnett	When Thu Oct 01, 2020 8:30am - 9:00am ET Comments Where Comments 3702 Posvar Hall-History Advising Type Service One Time Appointment	erase all data around that appointment and will not show up in any reporting. It is not advised.
Cancel Appointment Del	Course N/A	Close

- 3. You will need to mark the entire appointment canceled
- 4. Select a reason. Most often it will be cancelled by Advisor or student.
- Any comments left in the box are shared with the student via email. You can use this box to leave instructions on how to schedule a new appointment.
- 6. Click Mark as Cancelled

MANAGE APPOINTMEN	IT			×
History General Ad	visir	ıg		
All Attendees	Ŧ	Cancel Appointment		
▲ You (Organizer) ▲ Donna Sonnett	▼ ▼	Cancel Appointment For: Entire Appointment 💌		
		Reason: Cancelled by Advisor  Comments:		
		Don't Mark	Mark as celled	
Cancel Appointment Del	lete App	pointment	Clos	se ]



7. You will get confirmation that the appointment was canceled, then click Close.

All Attendees	Ŧ	Annoir	ntment Cance	lled	
You (Organizer) Donna Sonnett		[reschedule with organizer and attendees]         [reschedule with only attendees]         Organizer Jessica Lynn Watson Cancelled this         Appointment due to Cancelled by Advisor         Cancelled Oct 02 2020 at 6:19am ET			
		Appoin When	rri oct 02, 2020	Care Unit	[ edit ]
		Advising Service	Hall-History eral Advising	Comments None Type One Time Appoint	ment
		Course	N/A		



# How to Edit an Appointment

- 1. From your Upcoming Appointment tab on your Staff Home page, click on the Details link for the appointment you want to edit.
- 2. This will bring up the appointment details. Click the edit button at the top.

4	All Attendees	*	Appoi	ntment Detail	S [edit]
*	You (Organizer)	Ť	When	<b>Thu Oct 01, 2020</b> 8:30am - 9:00am ET	Care Unit Advising
Î	Donna Sonneu		Advising	r Hall-History	Comments None Type One Time Appointment
			Service History Gen	eral Advising	one rane Appointment
			Course	N/A	

REPORT FILED?	DETAILS
Not Yet.	Details
Not Yet.	Details

4. Make changes to the existing appointment in the scheduler which has both the availability of the advisor and any conflicts with the student's schedule.

Choose A Time To Meet							
Length:					Availabilities:?	Show Availabilities for This	Course/Service 🔻
TIME SLOT	01/27 (SUN)	01/28 (MON)	01/29 (TUE)	01/30 (WED)	01/31 (THU)	02/01 (FRI)	02/02 (SAT)
6:00am - 6:30am							
6:30am - 7:00am				CONFLICTS			
7:00am - 7:30am			CONFLICTS	CONFLICTS			
7:30am - 8:00am			CONFLICTS	CONFLICTS			
8:00am - 8:30am			CONFLICTS	CONFLICTS			
8:30am - 9:00am		DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	DROP-IN 0/1	
9:00am - 9:30am		DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	DROP-IN 0/1	
9:30am - 10:00am		DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	DROP-IN 0/1	
10:00am - 10:30am		DROP-IN	CONFLICTS	CONFLICTS	DROP-IN 0/1	DROP-IN 0/1	
10:30am - 11:00am		DROP-IN	CONFLICTS	CONFLICTS	DROP-IN	DROP-IN	

5. Save Appointment and an update will be set to both the advisor and student.

Save Appointment

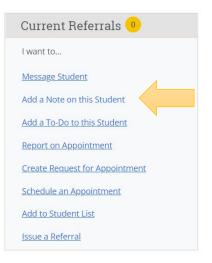
Cancel



# How to Add a Note to a Student's Page

Notes are used to document information *about* a student, whereas Appointment Summary Reports are used to document interactions *with* a student.

 To add note to a student's page, simply click on "Add a Note on this Student" when you are on the student's page.



- 2. Type your note. You can make the note only visible to you. If you don't check that box, everyone can see your note. Regardless of who can view the note, it is still subject to FERPA. Checking the student's name does not mean that the student will get an email about the note. It means that if the student logged into Navigate Student, they would see the note.
- 3. Click "Save Note"

ADD A NOTE TO JESSICA LYNN WATSON	_ ×							
Note (Required) Note Subject								
B I ∷≣ ≟≣ & Paragraph ∨ <\ri>	Jessica Lynn Watson Administration, Advisor, Coach, Student, Study Hall Monitor, Super User, Tutor							
	Relations Note Reason Note URL							
Attach File Choose File No file chosen	<b>Visibility</b> Amanda Beth Brodish Only? Jessica Lynn Watson?							
	Cancel Save Note							



# How to Make a Referral for a Student

*Referrals should be used for non-emergency situation only. For more information about referrals, click here.* 

1. From the student's page, click Issue a Referral on the right side of the screen

Current Referrals
I want to
Message Student
Add a Note on this Student
Report on Appointment
Create Request for Appointment
Schedule an Appointment
Add to Student List
<u>Issue a Referral</u>

- Click the "Please select a reason" drop down and select the referral you would like to make.
- 3. You can associate the referral with a specific course, if relevant.
- 4. Add comments in the "Additional Comments" box to provide contextual information.
- 5. Click the blue "Submit" button.

ISSUE REFERRAL			×
Student Matthew Smith			
Please select a reason	1		
Is this associated with a specific class?	Academic Advisor Bradford Campus Academic Referral		^
Additional Comments	Career Center Referral (PGH Campus)		
Please enter a comment.	Career Center Referral (UPG) Career Center Referral (UPJ) Financial Aid Referral Greensburg Campus Student Referral		
			•
		Cancel	Submit
STUDENT ID			



# How to View Notes and Appointment Summary Reports

1. To view notes and appointment summary reports, click on the "History" tab on the student's page.

Todo	1			
Overview	Success Progress	History	Class Info	More 🕶

2. Once on the "History" tab, scroll down to the "[Student Name]'s History" section. You will see a chronological list of all appointment summaries and notes left for a particular student, along with the date and name of the advisor who left it. You can click on the down arrow to view the report or note.

Todd's History 👻	
← Expand All	
Filter by Type	τ
- Mar 2019	
Advising Appointment - Wed, Mar 27, 2019 Academic Advising - 1st Year Students	Jill Harvey
Advising Appointment + Tue, Mar 26, 2019 Academic Advising - 1st Year Students	Amanda Brodish
Advising Appointment - Tue, Mar 12, 2019 CGS-Add/Drop	Jessice Watson
Advising Appointment - Tue, Mar 12, 2019 CGS-continuing Student Advising Appointment	Jessica Watson



# How to Create a Student List

To help keep track of a list of students, you can create a student list. This is a list of students manually created and maintained by a user that highlights a particular population. This list can be used for Advising Campaigns, communications, or other monitoring.

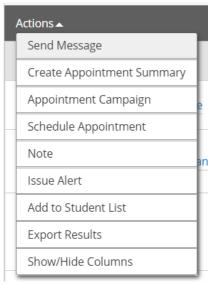
 Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students or by using the search functionality.



Search Icon

Actions	-	
		STUDENT NAME
	1	Wilson, Connor
	2	Martinez, Gabrielle
	3	Lynn, Brice
	4	Scholfield, Noah
•	5	Madoor, Navya

### 2. Under Actions select Add to Student List



3. Click on Create new list... and give the new student list a name. Click Save.

ADD TO STUDENT LIST	×
Create new list	
Cancel	Save



# How to Add Students to an Existing Student List

 Select students that you want to include in your Student List. The students could be manually assigned from your list of Assigned Students, by using the search functionality or even from your list of appointments.

Actions	-	
		STUDENT NAME
	1	Wilson, Connor
	2	Martinez, Gabrielle
	3	Lynn, Brice
	4	Scholfield, Noah
	5	Madoor, Navya

2. Under Actions select Student List.

	Actions 🔺	I	
1	Send Message	Ľ	
	Create Appointment Summary	Į.	3.
	Appointment Campaign	e	as
_	Schedule Appointment		
	Note	an	
	Issue Alert		
	Add to Student List		
	Export Results		
	Show/Hide Columns		

Click on the box next to the Student List you want to ssign the student to. Click Save.

ADD TO STUDENT LIST		×
Priority Enrollment Create new list		
	Cancel	Save



# How to Upload a Student List via Batch

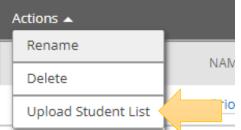
Often, you have queries from other systems that would be useful to your work within the Pathways system. Rather than recreate that list within Advanced Search or manually add students to a Student List, you can load students into the system from the list you already have using the Batch feature.

 Before you start in Pathways, you will need to create a .csv file in Excel. The spreadsheet should be simply a header and a list of PeopleSoft IDs of the students that you want to include in your Student List.

	А	В
1	Students	
2	123456	
3	234567	
4	345678	
5		
6		

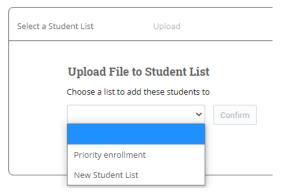
2. Click on the List & Searches icon.

# Student Lists



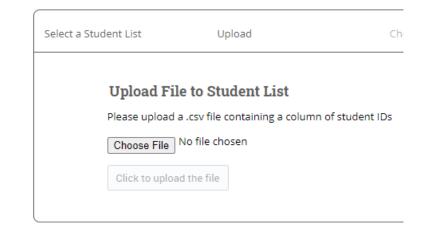
3. Click the Actions drop down and select Upload Student List.

4. To choose a list, click on the little triangle and select the list or create a new student list then click Confirm.





5. Click on the Choose File button to select the file you want to load and click on the Click to upload the file button.



Select a Stud	ent List Upload	6. Select the header of the column that holds all of your PeopleSoft ID's and click the blue Save button.
	Upload File to Student List You've uploaded 20200618_student_only_role.csv Cho	
3d Acrobat Reader	Last Name First Name User ID All Roles	

7. Depending on the size of the Student List, it may take a few minutes to load all of the students into the Student List.

# **Upload File to Student List**

Success! The students have been added to Priority enrollment Important: There may be a delay before all students appear in the list. View my Student Lists



# How to Create a Saved Search

- 1. From your homepage, click on the Lists & Searches Icon
- 2. Under Saved Searches, click the button New Saved Search

# Saved Searches

Actions 🗸		New Saved Search
	NAME	
	2201 History Majors	

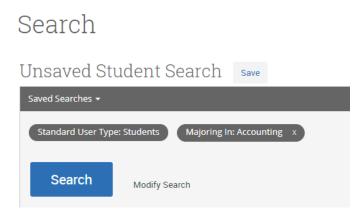
### 3. Use the search function and filters to select a group of students. Click Search.

### Search

New Search		
Saved Searches +		Show Advanced Filters
Keywords (First Name, Last Name, E-mail, Student ID)?	Type <sup>7</sup>	
	Students	
Student Information First Name, Last Name, Student	ID, Category, Tag, Gender, Race, Watch List	·
Enrollment History Enrollment Terms		<b>~</b>
Area of Study College/School, Degree, Concentration, Ma	ajor	
Performance Data GPA, Hours, Credits		*
Term Data Classification, Section Tag, Term GPA		<b>*</b>
Course Data Course, Section		<b>*</b>
Assigned To Advisor, Tutor, Coach		*
Success Indicators Success Markers		<b>~</b>
Search My Students Only At-Risk Studen	ts Only 🔲 Include inactive	



4. Once you have your list, click Save at the top of the page.



5. Name your list. Click Save Search.

SAVE SEARCH	×
Name 2201 Accounting Majors	
cancel	Save Search



# How to Access Your Saved Search

- 1. From your homepage, click on the Lists & Searches Icon
- 2. Click on the search that you want to run again. The system will rerun the search and return the results.

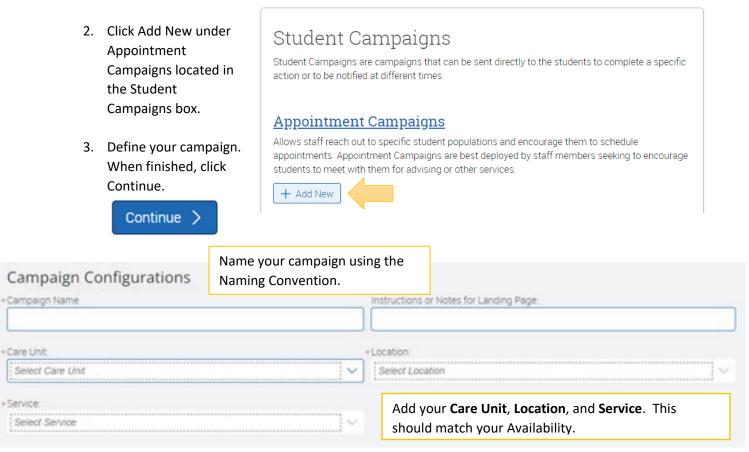
# Saved Searches

Actions 🗸		New Saved Search
	NAME	
	2201 History Majors	
	2201 Accounting Majors	



# How to Create an Appointment Campaign

1. Select the Campaigns icon from the Quick Links section on the left of your screen.



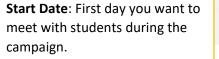
### Appointment Configurations

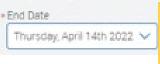
Appointment Limit:     X 1 X		Appointment Length:
• Slots Per Time:		Appointment Limit: Number of times you want the link in your invitation to work. Most often once.
Allow Scheduling Over Courses Staff Reminders: Recipient Reminders:		<b>Appointment Length</b> : How long want the appointment to last. Range from 5 to 360 min.
Email Text	🗹 Email 💟 Text	Slots Per Time: Number of students in the appointment.

### Scheduling Window

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

March 31st 2022	$\sim$
	March 31st 2022





**End Date**: Last day you want to meet with students during the campaign.



4. Find students to add to the Campaign by searching them and clicking Search.

Search

New Sea	arch	
Saved Search	es 🕶	
-	Name, Last Name, E-mail,	
Student ID)?	Search for students in the same way you would in Advanced Search.	
Student I	nformation First Name	, Last Name, 1

5. Select the students that you want to include in the Campaign by clicking on the box next to the name of the student individually OR click the box next to Name at the top of the list to **VAME** 



once. Then click Continue.

select everyone at

# Select Staff For Campaign

 You will need to add Staff to your Campaign. Click the box next to your name and then click Continue.

ID	NAME
	Liann Tsoukas
	Jessica Lynn Watson

+ Add Nudge

7. Now you compose your email message or Nudge. To do this, click the Add Nudge button.



A -1 -1	N Los al anno 1	
Add	Nudge	

### Preview Email

* Subject	Andrew, Schedule An Advising Appointment	
{\$student_first_name}, Schedule an Advising appointment	Andrew, Schedule An Advising Appointment	
Message <b>B</b> I I := := ∅ Heading 2 ∨ Merge Tags ∨ ⇔ ↔	<u>pathwa</u> ys	
	Please Schedule Your Advising Appointment.	
Please Schedule Your Advising Appointment.	Hello Andrew:	
Hello {Sstudent_first_name}: Please schedule an appointment for History General Advising at History Advising: 3702 Posvar Hall. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details. {\$schedule_link} Thank you!	Please schedule an appointment for History General Advising at History Advising: 3702 Posvar Hall. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details. Schedule an Appointment Thank you!	
Available Merge Tags 🛈	Questions? Please email PathwaysHelp@pitt.edu.	
{\$student_first_name} Inserts the student's first name	As you make changes you will see a	
{\$student_last_name} Inserts the student's last name	, , ,	
{\$schedule_link} Inserts a link to schedule the appointment	<ul> <li>preview of the email you are sending to</li> <li>students as they would see it in their</li> </ul>	
Add Attachment:	inboxes.	
Choose File No file chosen Send Date Thursday, March 31st 2022		

 Make edits to the email that you want to send to students. Make sure that the {\$schedule\_link} tag stays intact. This is how a student can make an appointment with you. Click Save Nudge.

Save Nudge >

9. Using Nudges, you can resend email reminder messages to the students who have not yet made an appointment with you. You can add as many Nudges as you want when you set up your Campaign, and they will be sent out on the day you choose. Once you have set up all of your nudges, click Continue.

You can send email reminders in advance for students who have not made an appointment with you using multiple Nudges. You decide the date that you want a new reminder to go out. Just follow the steps above to create as many reminders as you need. Now, you won't have to remember to check!

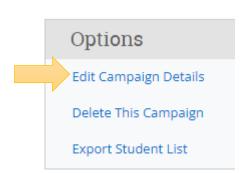
10. Confirm your Appointment Campaign and click Start Campaign.

Start Campaign

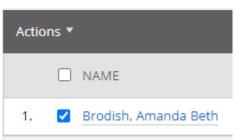


# How to Add a Student to an Existing Campaign

- 1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.
- 2. Under Options click Edit Campaign Details



3. Select Verify Recipients at the top of the screen.



✓ Verify Recipients

4. Click Add More Recipients and find the student you want to add. Click the box next to the student before clicking continue

- 5. Once you have added the students, click on Verify and Start to get to Verify and Start the last screen.
- 6. At the bottom of the screen, click Save and Exit.

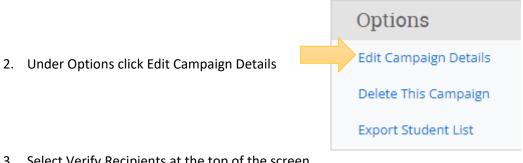


7. An email will be sent to the new students in your campaign in the next Nudge.



## How to Remove a Student from a Campaign

1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.



3. Select Verify Recipients at the top of the screen.

### ✓ Verify Recipients



- 6. Once you have removed the students, click on Verify and Start to Verify and Start get to the last screen.
- 8. Click Save and Exit to save your changes.





# Frequently Used Terms and Definitions

EAB: Name of the company that produced the software

Navigate: The name EAB gave to the Advisor software. Formerly Campus.

Navigate Student: The name EAB gave to the student facing app

Pathways: The name Pitt gave to the platform

**Appointment Campaigns:** The act of reaching out to a targeted student population using Pathways

**Student List:** A list manually created and maintained by a user that highlights a particular population (e.g. all of your seniors or all of your students with a GPA within a certain range

Location: Where advising or tutoring appointments occur

Service: Type of appointment

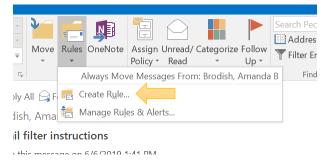
Alert: The name EAB gave to referrals

Case: Process of how a user manages referrals in Pathways

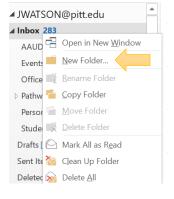


# How to Create a Rule in Outlook for Appointment Reminder Emails

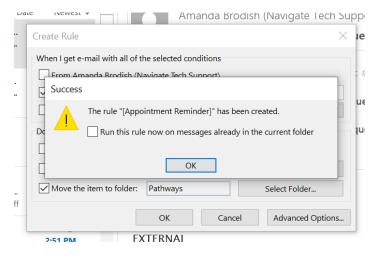
- 1. Right click on your inbox in Outlook to create a new folder to hold your Appointment Reminders
- 2. Highlight a message you would like to be included in the folder. Go to "Rules" and click "Create Rule".



- You will see this message box. Check the Subject contains box. Delete the rest of the text from the Subject of the email leaving just [Appointment Reminder].
- 4. Check the **Move the item to folder** box and select the folder that you created to hold the emails. Click Ok.



1	Amanda Brodish (Navigate Tech Suppo	or
	Create Rule × res	sti
	When I get e-mail with all of the selected conditions	
	From Amanda Brodish (Navigate Tech Support)	#
	Subject contains [Appointment Reminder]	+
	Sent to me only	sı
	Do the following	es.
Display in the New Item Alert window		
	Play a selected sound: Windows Notify Email.	
	Move the item to folder: Pathways Select Folder	
	OK Cancel Advanced Options	
	2-E1 DM EXTERNAL	



5. Clicking the box **Run this rule now on messages already in the current folder**, will pull all emails currently in your Outlook that fit this rule and place them in this folder. It is up to you if you wish to do this. Then click OK .

