



Office of the Provost

Pathways Appointment Campaign Documentation

Pathways Team
1-21-2024

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How to Set Your Availability in Navigate

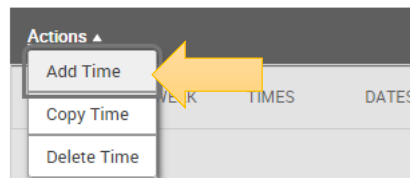
Set up your availability in Navigate so that students can schedule appointments to see you. It's important to note that locations and services are created by university administrators.

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

Staff Home ▾

Students Appointments **My Availability** App

Available Times



2. Select the days and times when you are available to meet with students

A screenshot of the 'When are you available to meet?' form. It includes a day selector (Mon-Sun), 'From' and 'To' time fields (8:00am to 5:00pm), a note about Eastern Time, a duration dropdown, a checkbox for 'Add to your personal availability link?', and a 'What type of availability is this?' section with 'Appointments', 'Drop-ins', and 'Campaigns' buttons. Below these are fields for 'Meeting Type', 'Care Unit', and 'Location'. 'Cancel' and 'Save' buttons are at the bottom right.

3. Select the Campaign button to be able to include your availability with your campaign.

What type of availability is this?

Appointments Drop-ins **Campaigns**





- 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. NOTE: This feature allows you send the Personal Availability Link directly to students and is used only for availability that is associated with “Appointments” in the previous step. Students cannot access the campaign from your personal availability link.


Add to your personal availability link?


☐ Add this availability to your personal availability link?


- Select the type of meeting (in person v. virtual) that you want to make yourself available for.
- Choose the care unit from the drop down menu.
- Choose the location where you are available from the drop down menu
- Select which type of appointment(s) for which you are available in Services.
- If it applies, you can add a URL or phone number for virtual appointments.

Meeting Type
Please select Meeting Types 





Care Unit
Please select a care unit 

Location
Please select a location 

Services
Please select services 

URL / Phone Number


Special Instructions for Student

B *I*    

e.g. room 23, please bring paper

- Select the number of students per appointment.
- Click the Save button.

Will you be meeting with multiple students?

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

Max Number of Students per Appointment

1 

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. If you want different messaging depending on the type of appointment a student selects, you will have to set up a separate line of availability.

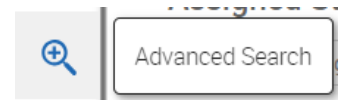
How to Create a Student List from your Assigned Students or via Search

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.

1. 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. You can select students individual or select all students. You can also search for students using the Search tool.

Assigned Students

List Type: Term: Relationship Type:



Actions ▾	
100 items on this page are selected. Select all 109 items.	
<input checked="" type="checkbox"/>	FIRST NAME
1. <input checked="" type="checkbox"/>	Deborah
2. <input checked="" type="checkbox"/>	Christina
3. <input checked="" type="checkbox"/>	Matthew



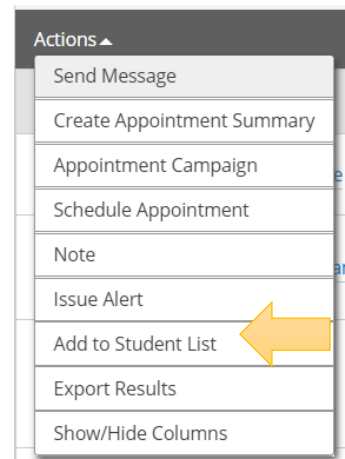
2. Under the Actions Drop-down menu, select Add to Student List.
3. Click on Create new list and give the new student list a name. Click Save.

ADD TO STUDENT LIST

☒

Create new list...

Cancel Save



NOTE: Saved lists are static groups of students and if the population of students changes, you must edit this list, or delete it and create a new one. It will not change like your "Assigned Students" as your list of assigned PeopleSoft Advisees changes.

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.

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

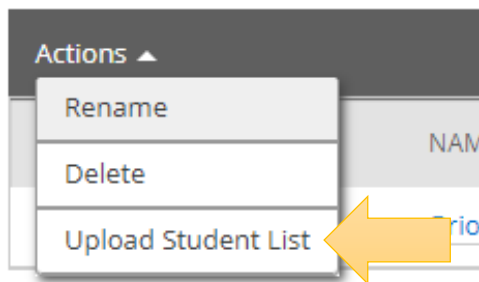
	A	B
1	Students	
2	123456	
3	234567	
4	345678	
5		
6		

2. Click on the List & Saved Items icon.

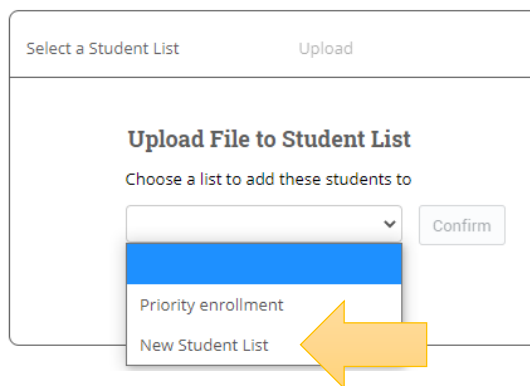


3. Click the Actions drop down and select Upload Student List.

Student Lists



4. You can add these students to an existing list, or select New Student List then click Confirm.



- 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 Student List Upload Ch

Upload File to Student List

Please upload a .csv file containing a column of student IDs

[Choose File](#) No file chosen

[Click to upload the file](#)

- Select the header of the column that holds all of your PeopleSoft ID's and click the blue Save button.

Select a Student List Upload Ch

Upload File to Student List

You've uploaded 20200618_student_only_role.csv Cho

[Save](#)

Last Name
First Name
User ID
All Roles

[Acrobat Reader](#)

- 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

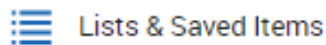
Success! The students have been added to [Priority enrollment](#)

Important: There may be a delay before all students appear in the list.

[View my Student Lists](#)

How to Create an Appointment Campaign from a Student List

1. Access your saved student list from the Lists and Saved Items button on the lefthand menu.



2. Click the list that includes students who you want to be included in the campaign.

My Saved Items

Student Lists

Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.

Actions ▾			New Student List
<input type="checkbox"/>	NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input type="checkbox"/>	Advisees for Campaign	Yes	104

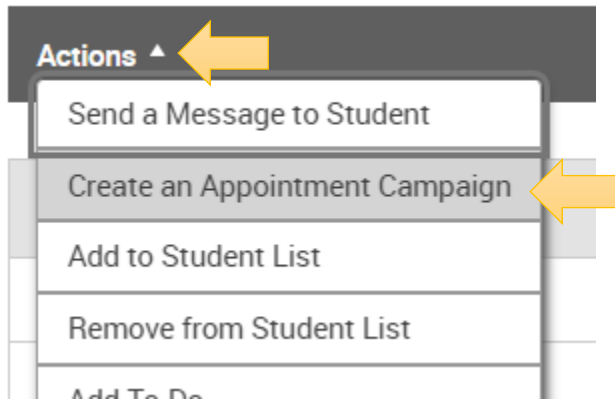
3. Use the checkboxes to check individual students, or the checkbox at the top to include all of your students. If you have more than 100 students, be sure to click the link that is displayed at the top of the list to "Select all items".

Advisees for Campaign ✎

☐ Do not show this list in analytics dashboards?

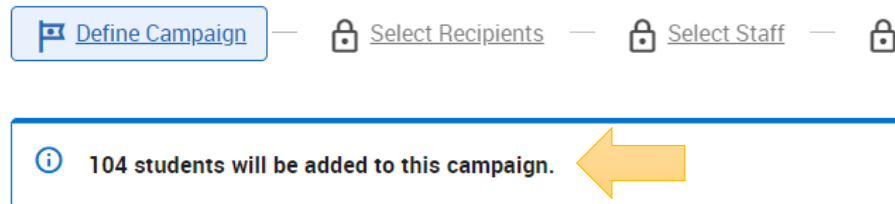
Actions ▾	
100 items on this page are selected. Select all 104 items.	
<input checked="" type="checkbox"/>	FIR E
1. <input checked="" type="checkbox"/>	Deborah
2. <input checked="" type="checkbox"/>	Christina
3. <input checked="" type="checkbox"/>	Matthew
4. <input checked="" type="checkbox"/>	Brandon

4. Use the Actions drop down and select Create an Appointment Campaign.



You will then be able to Define your campaign and see the number of students who are included.

New Appointment Campaign



Tip: Many locations in Pathways where you can select students, including your assigned student list from your Staff Home page, allow you to use the Actions drop-down to quickly create an Appointment Campaign.

Continue >

5. Define your campaign. When finished, click Continue.

Name your campaign using the Naming Convention.

Campaign Configurations

* Campaign Name

Instructions or Notes for Landing Page:

* Care Unit:

* Location:

* Service:

Add your **Care Unit, Location, and Service**. This should match your Availability.

Appointment Configurations

* Appointment Limit:

* Appointment Length:

* Slots Per Time:

☐ Allow Scheduling Over Courses

Staff Reminders: ☐ Email ☐ Text

Recipient Reminders: ☒ Email ☒ Text

Appointment Limit: Number of times you want the link in your invitation to work. Most often once.

Appointment Length: How long want the appointment to last. Range from 5 to 360 min.

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.

* Start Date:

* End Date:

Start Date: First day you want to meet with students during the campaign.

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

Continue >

6. In the Verify Recipients step, review your list and click Continue. If necessary, you can select and removed individual students.

[Define Campaign](#) — [Verify Recipients](#) — [Select Staff](#)

Add Recipients To Campaign

Review Recipients in Campaign

Actions ▴

Remove Selected Users

☐ NAME

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

If you do not appear as an available staff, the services for your availability and campaign may be different, or you may not have made availability for Campaigns. Go back to edit your availability, re-define your campaign or select the option to "Include Appointment Availabilities" to reference all of the availability you have created.

Select Staff For Campaign

Available Staff

☒ Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Michael Brubaker	For: Campaigns Tue 8:00am - 5:00pm ET For: Appointments Wed-Thu 8:00am - 5:00pm ET

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

+ Add Nudge

Add Nudge

* Subject

{student_first_name}, Schedule an Advising appointment

* Message

B **I** **☰** **☷** **🔗** **Heading 2** **Merge Tags** **↶** **↷**

Please Schedule Your Advising Appointment.
Hello {student_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!

Available Merge Tags

{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{schedule_link}	Inserts a link to schedule the appointment

Add Attachment:

Choose File No file chosen

* Send Date

Thursday, March 31st 2022

Select the date that you want your nudge email to be sent.

Preview Email

Andrew, Schedule An Advising Appointment



Please Schedule Your Advising Appointment.

Hello Andrew:

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!

Questions? Please email PathwaysHelp@pitt.edu.

As you make changes you will see a preview of the email you are sending to students as they would see it in their inboxes.

9. 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 >


10. 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!

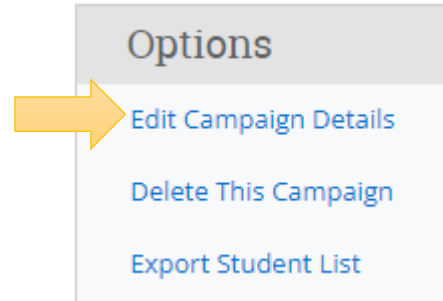
11. Confirm your Appointment Campaign and click Start Campaign.

Start Campaign

How to Add a Student to an Existing Campaign

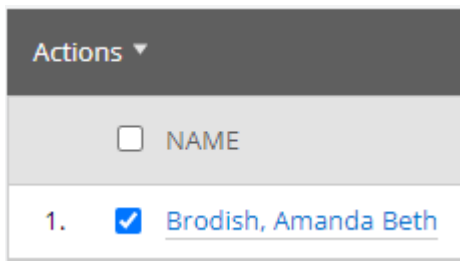
1. Click the Campaign icon  on the left side of the screen and select the campaign you want to edit.

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 the last screen. ✓ [Verify and Start](#)

6. At the bottom of the screen, click Save and Exit.

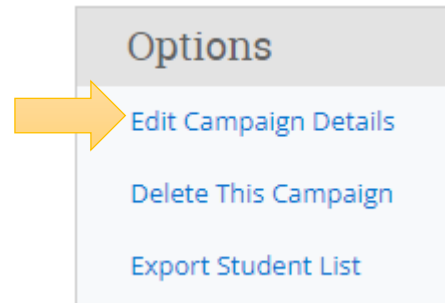


7. An email will be sent to the new students in your campaign in the next Nudge.

How to Remove a Student from a Campaign

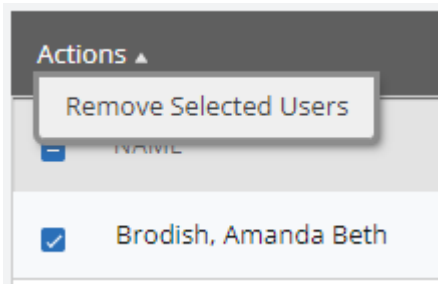
1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details



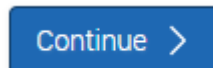
3. Select Verify Recipients at the top of the screen.

✓ [Verify Recipients](#)



4. Click on the box in front of the student you want to remove. Under Actions, select Remove Selected Users.

5. Once your list refreshed, click Continue



6. Once you have removed the students, click on Verify and Start to get to the last screen.

✓ [Verify and Start](#)

8. Click Save and Exit to save your changes.

