



Office of the Provost

Pathways Training Documentation

All Users

Pathways Team
4-25-2023

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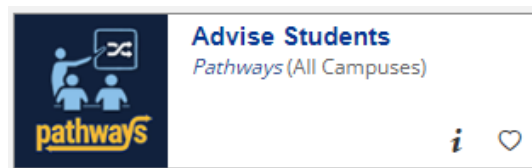
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How to Log Into Navigate

1. 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.



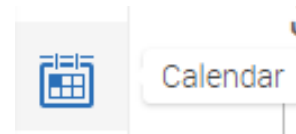
2. Chrome works best. If you have trouble access either site, please contact PathwaysHelp@pitt.edu for assistance.
3. Once you click the link, you will be directed to Pitt Passport to log in. Use your Pitt Passport credentials to log in.

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

How to Sync Your Calendar

SYNC YOUR CALENDAR ONLY IN THE PRODUCTION SITE

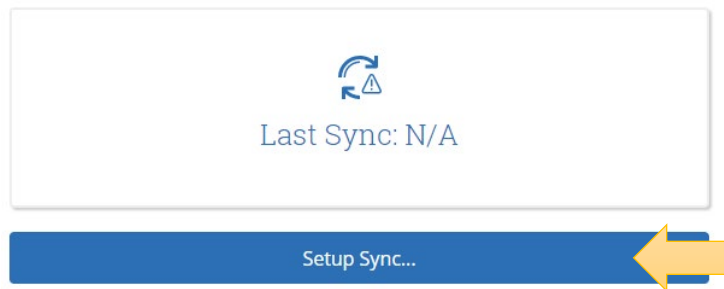
1. Click on the Calendar icon on the left hand side of the screen.



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.



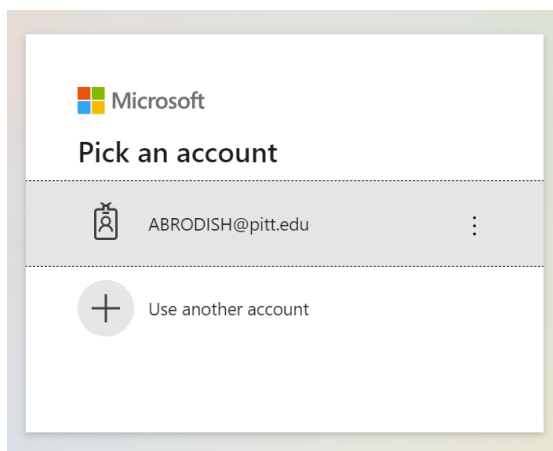
4. You will be prompted to select your Calendar Application. Click the Microsoft Outlook 365 button. This is the only ways your calendar will sync correctly.

Please Choose Your Calendar Application:

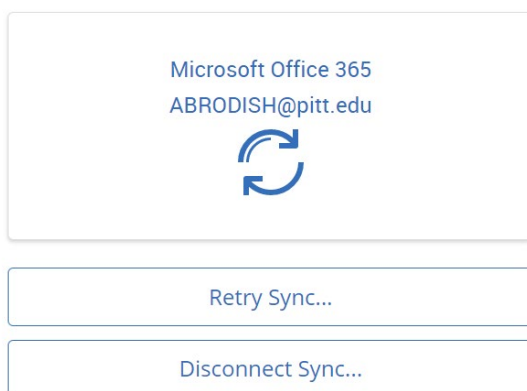
A screenshot of a selection dialog box. It contains four buttons: 'Microsoft Office 365', 'Google Calendar', 'Other Applications', and 'Go back...'. A large yellow arrow points down to the 'Microsoft Office 365' button.

Microsoft Office 365
Google Calendar
Other Applications
Go back...

5. Then choose your account.



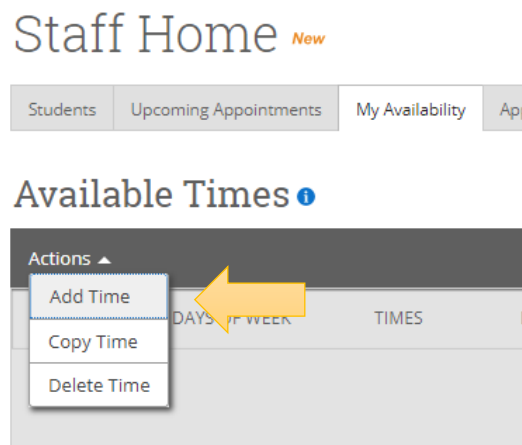
6. After signing in, you will see a yellow banner at the top of the screen indicating that sync was successful and you'll see the screen below.



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.

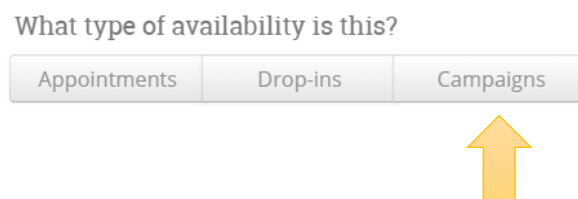
1. Click on the My Availability tab. Under Available Times, Go to the Actions menu and select Add Time



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

The form is titled 'When are you available to meet?'. It has tabs for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun'. Below these are 'From' and 'To' time fields (e.g., 8:00am to 5:00pm). A note states 'All times listed are in Eastern Time (US & Canada)'. There is a 'How long is this availability active?' dropdown menu. Below that is a checkbox 'Add to your personal availability link?'. The 'What type of availability is this?' section has three buttons: 'Appointments', 'Drop-ins', and 'Campaigns'. Below these are fields for 'Meeting Type', 'Care Unit', and 'Location'. At the bottom are 'Cancel' and 'Save' buttons. A yellow arrow points to the 'Campaigns' button.

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



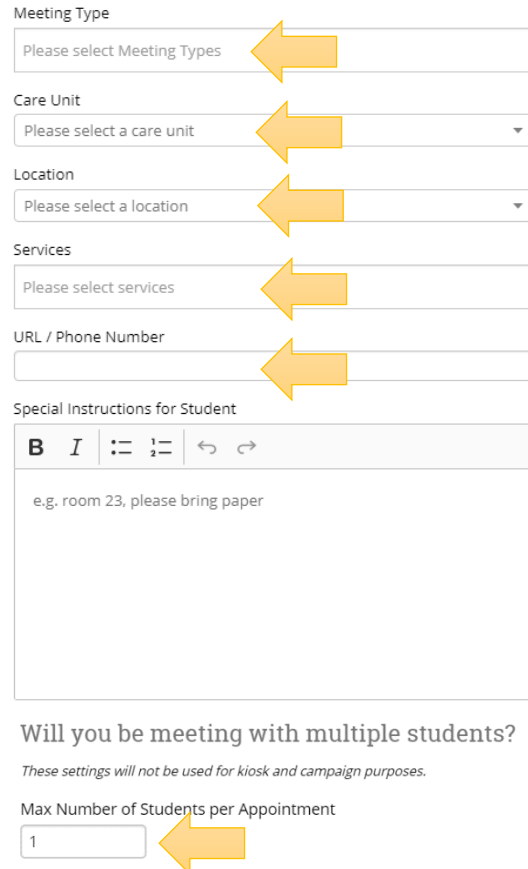
- Determine if you want to have this availability associated with your Personal Availability Link. If yes, click on the box. If no, leave it unchecked.

Add to your personal availability link?

☐ Add this availability to your personal availability link?

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

Repeat this process until all of your availabilities have been defined. You can have as much availability as you need!



The form contains the following fields and controls:

- Meeting Type:** A text input field with the placeholder "Please select Meeting Types".
- Care Unit:** A dropdown menu with the placeholder "Please select a care unit".
- Location:** A dropdown menu with the placeholder "Please select a location".
- Services:** A text input field with the placeholder "Please select services".
- URL / Phone Number:** A text input field.
- Special Instructions for Student:** A rich text editor with a toolbar containing Bold (B), Italic (I), Bulleted List (ul), Numbered List (ol), Undo (↶), and Redo (↷). The text area contains the example "e.g. room 23, please bring paper".
- Will you be meeting with multiple students?:** A section header.
- These settings will not be used for kiosk and campaign purposes.** A note.
- Max Number of Students per Appointment:** A text input field containing the number "1".

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 Search for a Student

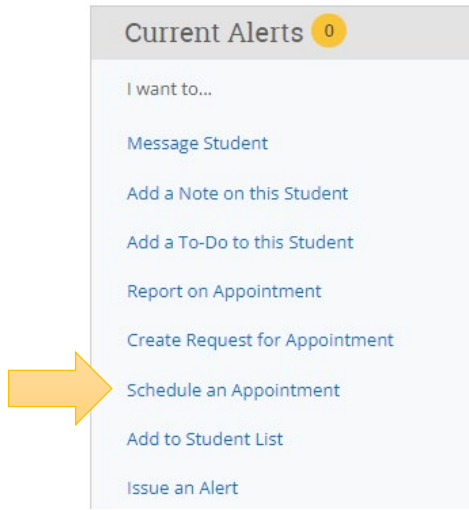
1. To search for a student, simply click on the “Quick Search” box in the center of the screen



2. Type in the name of a student and select the student to view his/her home page.



How to Schedule an Appointment

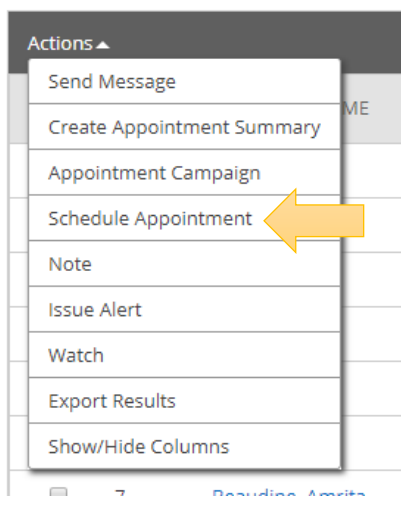


Current Alerts 0

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

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.



Actions ▲

- Send Message
- Create Appointment Summary
- Appointment Campaign
- Schedule Appointment**
- Note
- Issue Alert
- Watch
- Export Results
- Show/Hide Columns

3.

Schedule Appointment

Filters

Care Unit
Select a Care unit ▼

Location
Please Select care unit to select location ▼

Service
Select a location to select service ▼

Course
 🔍

Meeting Type
Select meeting type ▼

Comments

Select a Date

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

People Attending (1)

- Watson, Jessica Lynn

Available Slots Left in Appointment (0)

Save Appointment Cancel

Select Advising in Care Unit

Set location meeting in Location

Choose type of appointment in Service

Select the Meeting Type

If appropriate, select the Course if needed

If desired, Comments could be added

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

Select An Organizer

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

Choose A Time To Meet

Length: Availabilities:

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				CONFLICTS			
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	☐ 0/1	DROP-IN	☐ 0/1
9:00am - 9:30am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
9:30am - 10:00am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
10:00am - 10:30am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
10:30am - 11:00am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1

- 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. If an appointment is available, that appointment will display with a small green box that will need to be checked to select it.

- Click Save Appointment

Save Appointment

Cancel

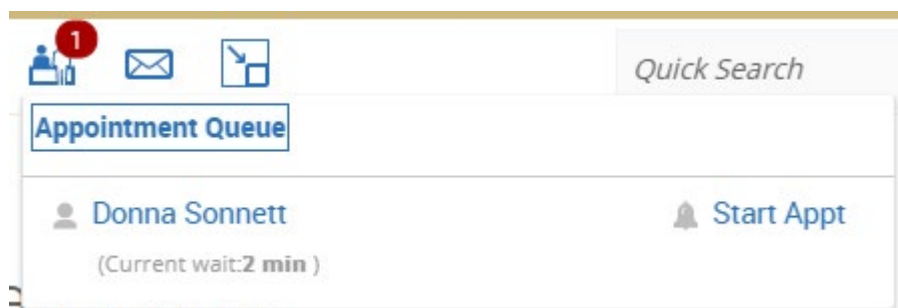
How to Complete an Appointment Summary Report When a Student Checks In for an Appointment at the Front Desk

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. Your Summary Report will also be visible to your colleagues to ensure consistent messaging.

1. When your advisee checks in for their appointment, you will be notified at the top of your screen.



2. Click on the icon and you can see the name of your advisee and how long they have been waiting. Click on Start Appt to start the appointment.



3. Fill in the information needed to complete the Summary Report

Appointment Details

Appointment
11/15/2018 4:00p-4:30p - ENGR- Academic/Career ...

Care Unit
Advising

Location
School of Engineering

Service
✖ ENGR- Academic/Career Decision

Course
Start typing to search all courses

Meeting Type
Select Meeting Type

Date of visit
11/15/2018

Meeting Start Time
4:00pm

Meeting End Time
4:30pm

Attendees

Jill Harvey
Advisor
☒ Attended

Ryan
Freshman
Undeclared
☒ Attended

Checkin
3:11pm

Checkout
3:11pm

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.
Date Time

Summary Details

Type of referral made

Objectives of the Session

Study Skills Used

Goals For Next Session

Did the student attend at least one university event in the last month? ☐ Yes ☐ No ☐ N/A

Did the student attend at least one school or department event in the last month? ☐ Yes ☐ No ☐ N/A

Has the student participated in a mentoring/networking opportunity? ☐ Yes ☐ No ☐ N/A

Is the student participating in a club or organization? ☐ Yes ☐ No ☐ N/A

Is the student involved in community service activities? ☐ Yes ☐ No ☐ N/A

Appointment Summary

B *I* Paragraph

Did you know?

- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

Attachments

Attach File
Choose File No file chosen

4. Once complete click Save this Report.

Save this Report

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

REPORT FILED? ▾

Report Details

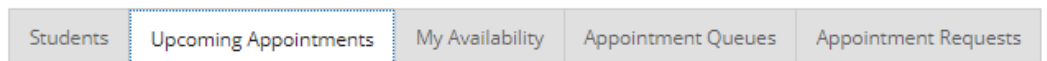
Not Yet.

How to Complete an Appointment Summary Report When a Student Doesn't Get Checked In via the Front Desk

Sometimes, students just show up to your office or don't come through the usual channels. In these cases, being able to complete an appointment summary in Pathways help you to give the same level of attention to each student no matter how they get to your door.

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

Staff Home New



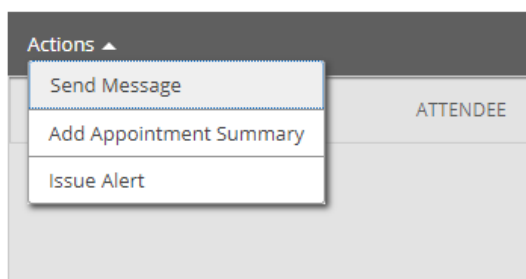
2. Select a student for whom you would like to create an Appointment Summary.

Actions ▾		
☐		DATE
☒	1/1	11/26/2018 02:19p - 02:21p
☐	1/1	11/15/2018 03:11p - 03:11p

3. Scroll down to either the Upcoming Appointments or Recent Appointments sections. Under Actions select Add Appointment Summary

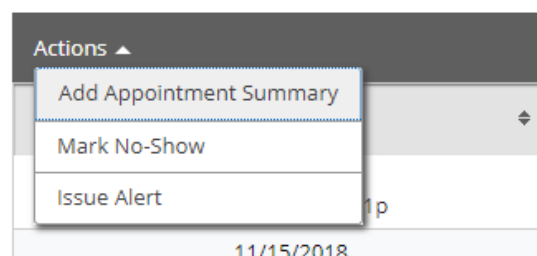
Upcoming Appointments

Care Unit: All care units ▾



Recent Appointments

Care Unit: All care units ▾



4. Fill in the information needed to complete the Summary Report

Appointment Details

Appointment
11/15/2018 4:00p-4:30p - ENGR- Academic/Career ...

Care Unit
Advising

Location
School of Engineering

Service
ENGR- Academic/Career Decision

Course
Start typing to search all courses

Meeting Type
Select Meeting Type

Date of visit
11/15/2018

Meeting Start Time
4:00pm

Meeting End Time
4:30pm

Attendees

Jill Harvey
Advisor
☒ Attended

Ryan
Freshman
Undeclared
☒ Attended

Checkin
3:11pm

Checkout
3:11pm

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.
Date Time

Summary Details

Type of referral made

Objectives of the Session

Study Skills Used

Goals For Next Session

Did the student attend at least one university event in the last month? ☐ Yes ☐ No ☐ N/A

Did the student attend at least one school or department event in the last month? ☐ Yes ☐ No ☐ N/A

Has the student participated in a mentoring/networking opportunity? ☐ Yes ☐ No ☐ N/A

Is the student participating in a club or organization? ☐ Yes ☐ No ☐ N/A

Is the student involved in community service activities? ☐ Yes ☐ No ☐ N/A

Appointment Summary

B I Paragraph

Did you know?

- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

Attachments

Attach File
Choose File No file chosen

5. Once complete click Save this Report.

Save this Report

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

REPORT FILED? ▾

Report Details

Not Yet.

How to Complete an Appointment Summary Report without an Appointment

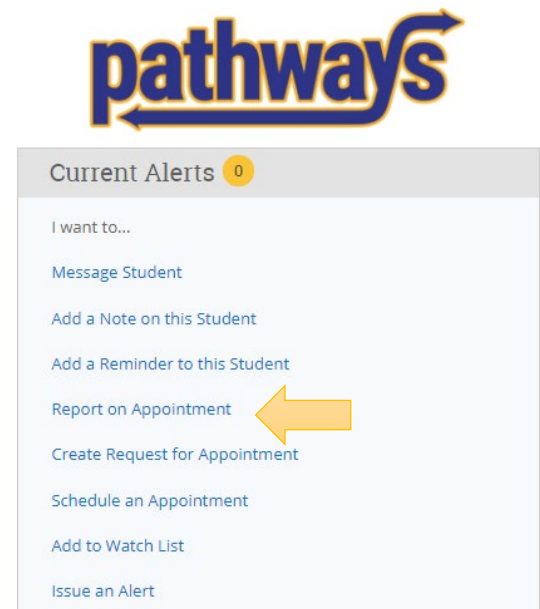
1. To search for a student, simply click on the “Quick Search” box in the center of the screen

A screenshot of a web interface showing a search bar. Above the search bar is a solid blue horizontal bar. The search bar itself is a light gray rectangle with a thin blue border. Inside the search bar, the text "Quick Search" is written in a light gray, italicized font.

2. Type in the name of a student and select the student to view his/her home page.

A screenshot of a web interface showing a search bar with the text "Jessica Watson" entered. Below the search bar, a dropdown menu is open, displaying a list of search results. The first result is "Jessica Lynn Watson (*5156) (administration)" in blue text, which is highlighted with a blue background. The search bar has a blue header bar above it.

3. Under Actions off to the right, click on the drop down to give you the options and select “Report on Appointment”.

A screenshot of a web interface showing the "pathways" logo in blue and yellow. Below the logo is a section titled "Current Alerts" with a yellow circle containing the number "0". Below this section is a list of actions: "I want to...", "Message Student", "Add a Note on this Student", "Add a Reminder to this Student", "Report on Appointment", "Create Request for Appointment", "Schedule an Appointment", "Add to Watch List", and "Issue an Alert". A yellow arrow points to the "Report on Appointment" option.

4. Fill in the information needed to complete the Summary Report

Appointment Details

Appointment
11/15/2018 4:00p-4:30p - ENGR- Academic/Career ...

Care Unit
Advising

Location
School of Engineering

Service
✖ ENGR- Academic/Career Decision

Course
Start typing to search all courses

Meeting Type
Select Meeting Type

Date of visit
11/15/2018

Meeting Start Time 4:00pm **Meeting End Time** 4:30pm

Attendees

Jill Harvey
Advisor
☒ Attended

Ryan
Freshman
Undeclared
☒ Attended

Checkin 3:11pm **Checkout** 3:11pm

Suggested Followup
This will be saved on the report as a suggestion. No appointment will be created.
Date Time

Summary Details

Type of referral made

Study Skills Used

Did the student attend at least one university event in the last month? ☐ Yes ☐ No ☐ N/A

Did the student attend at least one school or department event in the last month? ☐ Yes ☐ No ☐ N/A

Has the student participated in a mentoring/networking opportunity? ☐ Yes ☐ No ☐ N/A

Is the student participating in a club or organization? ☐ Yes ☐ No ☐ N/A

Is the student involved in community service activities? ☐ Yes ☐ No ☐ N/A

Objectives of the Session

Goals For Next Session

Appointment Summary

B **I** **☰** **☰** **🔗** Paragraph **↶** **↷**

Did you know?

- You can upload a file as an attachment to the report.
- The Yes/No questions are not required to save the report.

Attachments
Attach File
Choose File No file chosen

5. Once complete click Save this Report.

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 Appointments

Care Unit: All care units 

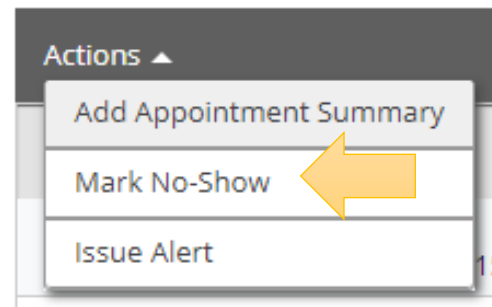
2. Click on the box next to the appointment you want to mark as a No Show.

Recent Appointments

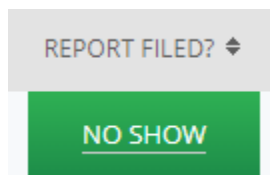
Care Unit: All care units 

Actions ▾		
		DATE
☒	1/1	05/06/2020 03:00p - 03:15p EDT
☐	1/1	05/06/2020 02:15p - 02:30p EDT
☐	1/1	05/06/2020 02:00p - 02:15p EDT

3. Open Actions button and select Mark No-Show



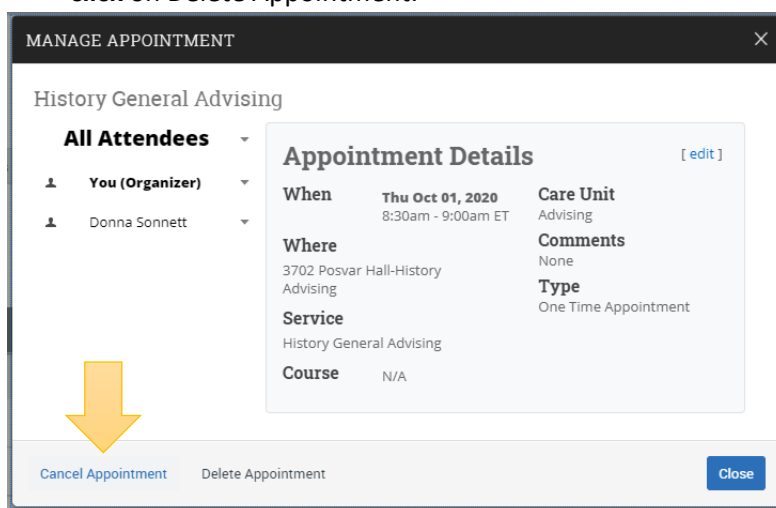
4. An Appointment Summary will open. You can add a note or simply close it. A green No-Show box will show in the Report Filed column



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 left. **Do not** click on Delete Appointment.

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



MANAGE APPOINTMENT

History General Advising

All Attendees

- You (Organizer)
- Donna Sonnett

Appointment Details [edit]

When Thu Oct 01, 2020 8:30am - 9:00am ET

Where 3702 Posvar Hall-History Advising

Service History General Advising

Course N/A

Care Unit Advising

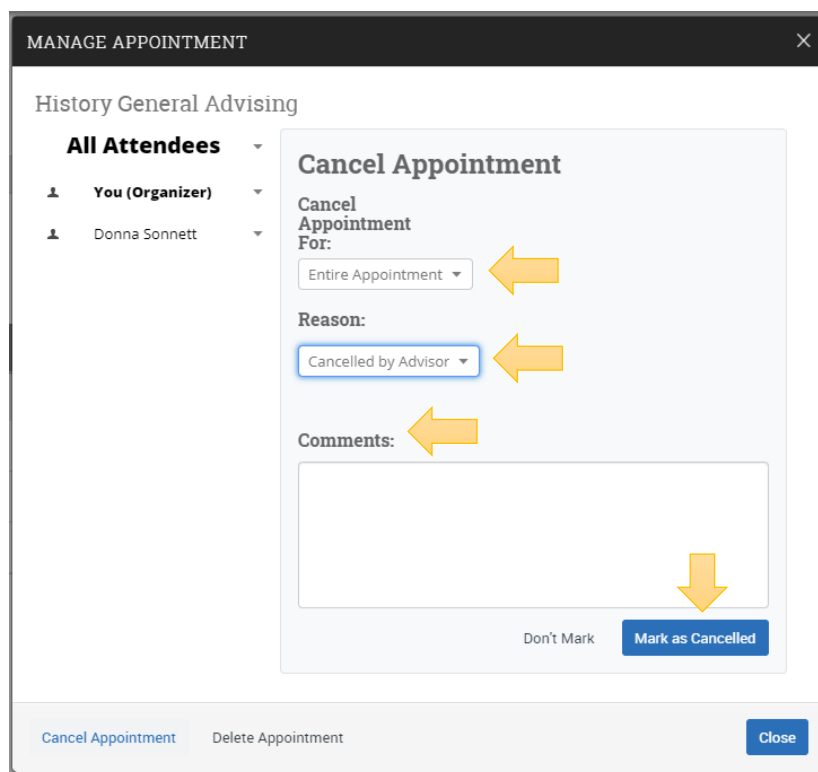
Comments None

Type One Time Appointment

[Cancel Appointment](#) [Delete Appointment](#) [Close](#)

Delete Appointment will erase all data around that appointment and will not show up in any reporting. It is not advised.

3. You will need to mark the entire appointment canceled
4. Select a reason. Most often it will be cancelled by Advisor or student.
5. 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 APPOINTMENT

History General Advising

All Attendees

- You (Organizer)
- Donna Sonnett

Cancel Appointment

Cancel Appointment For: Entire Appointment

Reason: Cancelled by Advisor

Comments:

[Don't Mark](#) [Mark as Cancelled](#)

[Cancel Appointment](#) [Delete Appointment](#) [Close](#)

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

MANAGE APPOINTMENT

History General Advising

All Attendees

You (Organizer)

Donna Sonnett

Appointment Cancelled

[\[reschedule with organizer and attendees\]](#)
[\[reschedule with only attendees\]](#)

Organizer Jessica Lynn Watson Cancelled this Appointment due to **Cancelled by Advisor**

Cancelled Oct 02 2020 at 6:19am ET

Appointment Details

When

Fri Oct 02, 2020
8:00am - 8:30am ET

Care Unit

Advising

Where

3702 Posvar Hall-History
Advising

Comments

None

Service

History General Advising

Type

One Time Appointment

Course

N/A

Delete Appointment



Close

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.

MANAGE APPOINTMENT

History General Advising

All Attendees

- You (Organizer)
- Donna Sonnett

Appointment Details [edit]

When Thu Oct 01, 2020 8:30am - 9:00am ET

Where 3702 Posvar Hall-History Advising

Service History General Advising

Course N/A

Care Unit Advising

Comments None

Type One Time Appointment

Cancel Appointment Delete Appointment Close

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				CONFLICTS			
6:30am - 7:00am			CONFLICTS	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	0/1	DROP-IN	0/1
9:00am - 9:30am		DROP-IN	CONFLICTS	CONFLICTS	0/1	DROP-IN	0/1
9:30am - 10:00am		DROP-IN	CONFLICTS	CONFLICTS	0/1	DROP-IN	0/1
10:00am - 10:30am		DROP-IN	CONFLICTS	CONFLICTS	0/1	DROP-IN	0/1
10:30am - 11:00am		DROP-IN	CONFLICTS	CONFLICTS	0/1	DROP-IN	0/1

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.

1. 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.



Current Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment
- Schedule an Appointment
- Add to Student List
- Issue an Alert

Edit User Settings

Impersonate User

ADD A NOTE TO JESSICA LYNN WATSON

Note (Required)

B I [List Icons] Paragraph [Dropdown] [Undo] [Redo]

[Text Area]

Attach File [Choose File] No file chosen

Note Subject

Jessica Lynn Watson

Relations

Note Reason [Text Field]

Note URL [Text Field]

Visibility

☐ Amanda Beth Brodish Only?

☐ Jessica Lynn Watson?

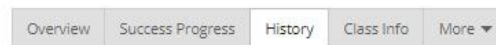
Cancel **Save Note**

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 the Navigate platform, they could see the note if the student has access.

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.

Todd



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 ▾

The screenshot displays the 'Todd's History' section. At the top, there is a dark grey bar with a 'Expand All' link. Below this is a 'Filter by Type' dropdown menu. The main content area shows a chronological list of appointments for March 2019. Each entry includes a person icon, the appointment type (e.g., 'Advising Appointment'), the date, the course/program, and the advisor's name with their own icon.

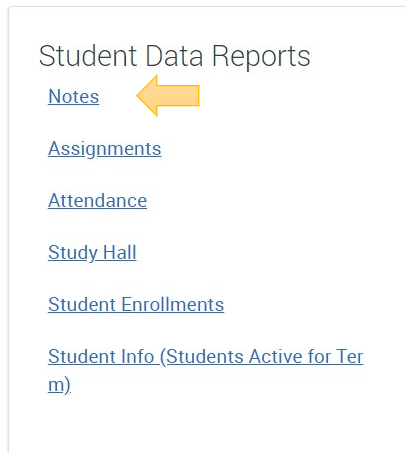
Appointment Type	Date	Course/Program	Advisor
Advising Appointment	Wed, Mar 27, 2019	Academic Advising - 1st Year Students	Jill Harvey
Advising Appointment	Tue, Mar 26, 2019	Academic Advising - 1st Year Students	Amanda Brodish
Advising Appointment	Tue, Mar 12, 2019	CGS-Add/Drop	Jessica Watson
Advising Appointment	Tue, Mar 12, 2019	CGS-Continuing Student Advising Appointment	Jessica Watson

How to Search Notes Using Reports

1. Select Reports



2. Under Student Data Reports, click Notes.



3. In Search Notes Text, you can search the notes for specific words in the text. If you add a hashtag inside the note, you would be able to search for it here. You can also limit your search to a specific student, a date range, or any other field.

Activity Filters

Begin Date 09/17/2020	End Date 09/24/2020
Search Note Text 	
Note Reasons 	

4. Click Search.



5. Once you find the note you are looking for, you can click view. The note will open in its full form which will often be easier to read than the line returned in the search result.

How to Create a Student List

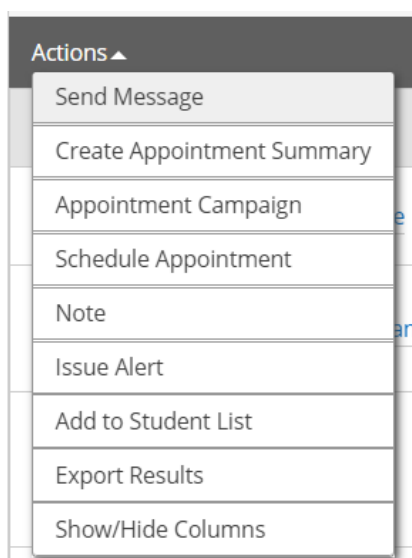
To help keep track of a list of students, you can create a student list. This is a list of students manually created and maintained by a user that highlights a particular population. This list can be used for Advising Campaigns, communications, or other monitoring.

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.

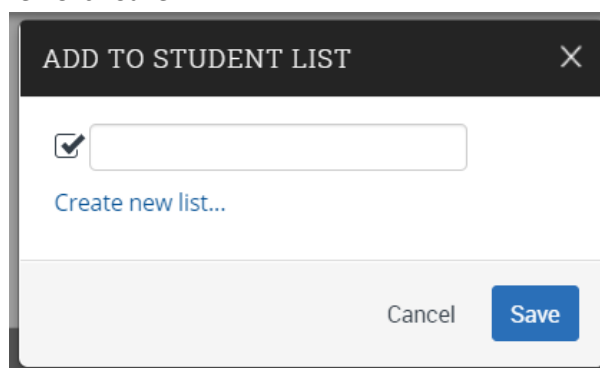


Search Icon

2. Under Actions select Add to Student List



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



4. In your list of students, a small eye icon will appear next to the name of the student.

My Assigned Students for Spring Term 2018-2019 ▾

Actions ▾				
☐ ALL		STUDENT NAME	ID	WATCH LIST
☐	1	Abdalla, Mahmoud		
☐	2	Bastian, Heather		

Reminder:

Hovering your mouse over the eye icon will tell you to which of your Student lists the student is assigned.

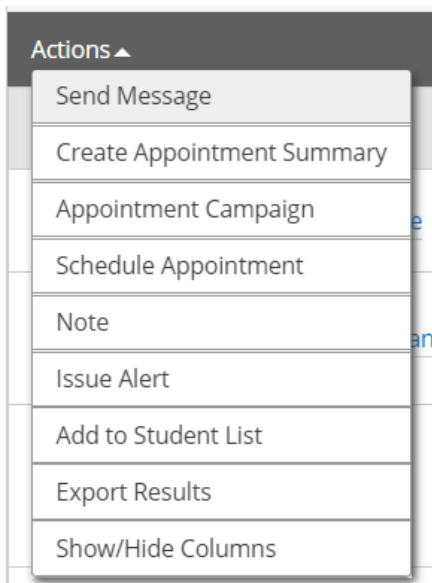
A student can be assigned to more than one list

How to Add Students to an Existing Student List

1. 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 ▾		
☐ ALL	STUDENT NAME	
☒	1	Wilson, Connor
☒	2	Martinez, Gabrielle
☒	3	Lynn, Brice
☒	4	Scholfield, Noah
☒	5	Madoor, Navya

2. Under Actions select Student List.



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

ADD TO STUDENT LIST

☐ Priority Enrollment
[Create new list...](#)

Cancel
Save

4. In your list of students, a small eye icon will appear next to the name of the student. A student can be assigned to more than one Student list. Hovering over the eye icon, will show to which of your lists a student is assigned.

My Assigned Students for Spring Term 2018-2019 ▾

Actions ▾			
☐ ALL	STUDENT NAME	ID	WATCH LIST
☐	1	Abdalla, Mahmoud	
☐	2	Bastian, Heather	

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.

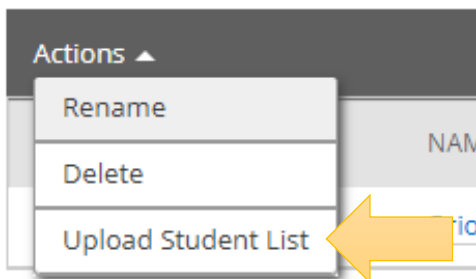
1. Before you start in Pathways, you will need to create a .csv file in Excel. The spreadsheet should be simply a header and a list of PeopleSoft IDs of the students that you want to include in your Student List.

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

2. Click on the List & Searches icon.

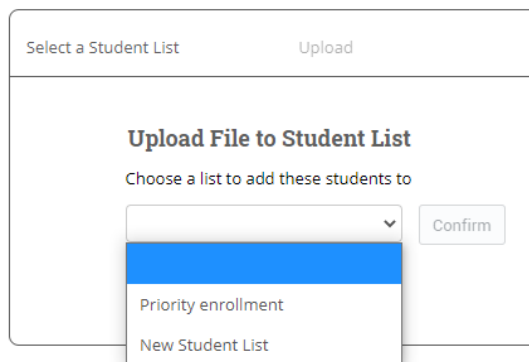


Student Lists



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

- 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? Students ▾

Student Information

First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

Enrollment History

Enrollment Terms

Area of Study

College/School, Degree, Concentration, Major

Performance Data

GPA, Hours, Credits

Term Data

Classification, Section Tag, Term GPA

Course Data

Course, Section

Assigned To

Advisor, Tutor, Coach

Success Indicators

Success Markers

Search

☐ My Students Only
 ☐ At-Risk Students Only
 ☐ Include Inactive

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

Search

Unsaved Student Search

[Save](#)

Saved Searches ▾

Standard User Type: Students

Majoring In: Accounting x

Search

Modify Search

- Name your list. Click Save Search.

SAVE SEARCH

×

Name

2201 Accounting Majors

cancel

Save Search

How to Access Your Saved Search

- From your homepage, click on the Lists & Searches Icon 
- 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.

2. Click Add New under Appointment Campaigns located in the Student Campaigns box.

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

Continue >

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New



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.

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

Search

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Search for students in the same way you would in Advanced Search.

Student Information First Name, Last Name, ...

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 select everyone at once. Then click Continue.

☒ NAME

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

Select Staff For Campaign

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.

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.

- 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 >

- 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!

- Confirm your Appointment Campaign and click Start Campaign.

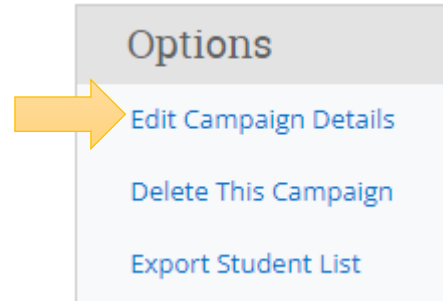
Start Campaign



How to Add a Student to an Existing Campaign

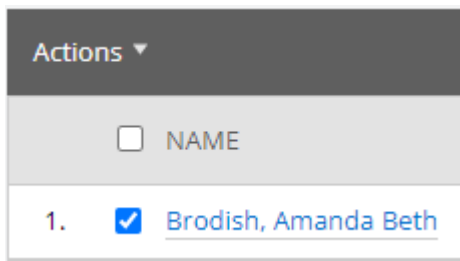
1. Click the Campaign icon  on the left side of the screen and select the campaign you want to edit.

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.

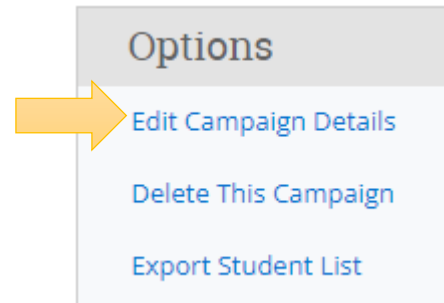


7. An email will be sent to the new students in your campaign in the next Nudge.

How to Remove a Student from a Campaign

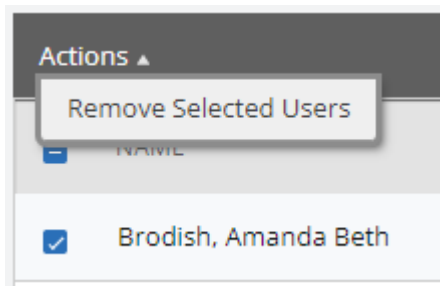
1. Click the Campaign icon on the left side of the screen and select the campaign you want to edit.

2. Under Options click Edit Campaign Details



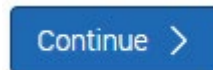
3. Select Verify Recipients at the top of the screen.

✓ [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.



How to Make a Referral for a Student

Referrals should be used for non-emergency situation only. For a complete list of Referral and Case Management Information, [click here](#).

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

Current Alerts 0

- 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

2. Click on the drop down and select the group you want to refer the student to
3. Add comments in the Additional Comment box to give additional information and click Submit

ISSUE AN ALERT

Student

Please select the reason you believe this student needs assistance

Is this alert associated with a specific class? Optional

Additional Comments

Please enter a comment.

Cancel Submit

How to Manage a Referral

1. When a referral that has been associated with has been made, an email will be sent to you



A Case has been Assigned to You

Student

Otis Amick

Alert Reasons

Personal Issue

Alert Issued By

Amanda Pearce

[View Case Details](#)

You can also copy and paste this address into your web browser

https://pitt-campus-training.eab.com/cases?case=4216-personal_issue

Questions? Please email PathwaysHelp@pitt.edu.



2. There are two ways to “manage” a case to which you’ve been assigned:
 - a. Via the student’s history tab:

Jessica Lynn's History ▾

▼ Expand All

Filter by Type

Sep 2020

Alert Issued ▾
Thu, Sep 24, 2020 Study Abroad Donna Sonnett

Case Opened ▲
Thu, Sep 24, 2020 Study Abroad Donna Sonnett

Assigned to:
Pitt Study Abroad

[Manage Case](#)

Advising Appointment ▾
Fri, Sep 18, 2020 UPJ-Civil Engineering Advising Donna Sonnett

- b. Or via the case tab on the left-hand side of the screen



3. Using your unit's more detailed document on recommended actions and follow-up, you can add a comment, assign a new advisor to the case, or a close a case.
- 4.

The screenshot shows the 'MANAGE CASE' window for a case owned by Jessica Lynn Watson, with the reason 'Study Abroad'. The interface includes fields for 'Owner' (a dropdown menu) and 'Assignees' (a text input with a dropdown arrow). Below these are 'Discard' and 'Save Changes' buttons. The 'Case Activity' section shows a timeline of events dated 09/24/2020 at 10:09AM, including case assignment, opening, and a comment. At the bottom, there is an 'Add Comment' button and a 'Close Case' button. Annotations with yellow boxes and arrows point to the 'Owner' dropdown, the 'Assignees' dropdown, the 'Add Comment' button, and the 'Close Case' button.

MANAGE CASE

Owner: Select an owner

Assignees: . Pitt Study Abroad

Discard Save Changes

Case Activity:

09/24/2020

Donna Sonnett assigned case to . Pitt Study Abroad. 10:09AM

Donna Sonnett opened case. 10:09AM

Donna Sonnett added comment: 10:09AM
Student is interested in studying library science in England

Add Comment Add Comment

cancel Close Case

Assign an Owner

Assign New Advisor

Add Comment

Close Case

5. Current case outcomes are below.
 - a. Student Registered for Classes
 - b. Student Not Registered After Attempts
 - c. Unable to Track Down Student
 - d. Student Responded to Academic Advisor
 - e. Student Received Support

How to Launch the Appointment Center

1. In the bottom right hand corner of the screen, click on Additional Modes. Select Appointment Center.

**Appointment Center
Kiosk**

Additional Modes ▼

2. Click on your Appointment Center location.

Choose Appointment Center Location

Appointment Center Name

Available Locations

110 Millstein Library

200 William Pitt Union

208 Thackeray Hall - Advising Center

ASC: G-16 Owen Library

McCarl Center (1400 Posvar Hall)

School of Nursing

152 Benedum

201 Thackeray Hall - Advising Center

Academic Advising Center Hanley 218

Dietrich On Call Advising

Office of Veterans Services

Study Lab - G-1 GSCC

3. You now can see the Appointment Center for your location including advisors who are available for appointments today.

Study Lab - G-1 GSCC

Enter Student Name

Scheduling Grid ▼

Date: 07/12/2019 Start Time: 8:00AM End Time: 5:00PM Refreshed Today 02:57 PM

Care Unit: Advising Service: All Services Staff: All Staff

Find First Available?

Appointment Schedule For Friday, July 12, 2019

	Amanda Brodish	Jill Harvey	Mary Napoli
8 AM	Study Skills Inventory		
9 AM			
...			
			Academic Coaching

How to Use Your Appointment Center

Change the way you view the appointments

1. The default to view your appointments is a vertical grid.
2. To change to a horizontal view, click on the Orientation drop down and select Horizontal

Orientation Display Name

Horizontal ▼ Service ▼

Vertical

Horizontal

Appointment Schedule For Friday, July 12, 2019

	Amanda Brodish	Jill Harvey	Mary Napoli
8 AM	Study Skills Inventory	Drop In	
9 AM			
10 AM			Academic Coaching
11 AM			
Noon			Academic Coaching
1 PM			
2 PM			
3 PM			
4 PM			

Appointment Schedule For Friday, July 12, 2019

	8 AM	9 AM	10 AM	11 AM
Amanda Brodish	Study Skills ...			
Jill Harvey	Drop In			
Mary Napoli			Academic C...	

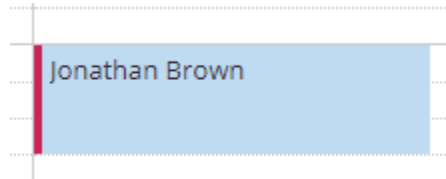
3. Now you can view your appointments horizontally. This can be easier to view a larger group of Advisors.

Please note:

Currently there is no way to make this change the default.

Change the way the names of appointments are displayed

The default display name on your appointment is the name of your Service. To change the name that is displayed on the appointment to the name of the student, click the Display Name drop down and select Attendee. Now the name of the student will show up in their appointment slot rather than their Appointment type.



Display Name



Change the date you are viewing

To make an appointment on a different date, click on the Date field under the Scheduling Grid. Select the date you want to make an appointment on in the calendar. Follow the instructions on how to schedule an appointment.

Scheduling Grid ▼

Date: 07/12/2019  Start Time: 8:00AM ▼ End Time: 5:00PM ▼

July 2019

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

for Friday, July 12,

Change the start and end time of the Scheduling Grid

The default appointment times in Pathways is from 8am-5pm. Many offices are open during different hours. To change the time, simply click on the drop down menus called Start Time and End Time to change the time you see in your grid.

Scheduling Grid ▼

Date: 07/12/2019  Start Time: 8:00AM ▼ End Time: 5:00PM ▼

Please note: Currently there is no way to make any of these changes the default.

How to Check In a Student for a Scheduled Appointment

Manual Check-In

Using Scheduling Grid

Appointment Schedule For Tuesday, July 16, 2019

1. Click on the appointment

	Amanda Brodish	Mary Napoli
	Drop In	
8 AM		
9 AM	ENGR-Academic Advising - 1s...	

2. Click on Check in Appointment.

MANAGE APPOINTMENT

ENGR-Academic Advising - 1st Year Students

All Attendees

- Amanda Brodish (Organizer)
- Todd Ackerman

Appointment Details [edit | move]

When Tue Jul 16, 2019 09:00 am - 09:30 am

Where 152 Benedum

Service ENGR-Academic Advising - 1st Year Students

Course N/A

Care Unit Advising

Comments Todd Ackerman: Skype Call

Type One Time Appointment

Cancel Appointment Check In Appointment Delete Appointment Close

3. Click the blue check in button.

4. A notification will be sent to the Advisor to let them know their student is here for their appointment.



MANAGE APPOINTMENT

ENGR-Academic Advising - 1st Year Students

All Attendees

- You (Organizer)
- Todd Ackerman

Check in user for ENGR-Academic Advising - 1st Year Students

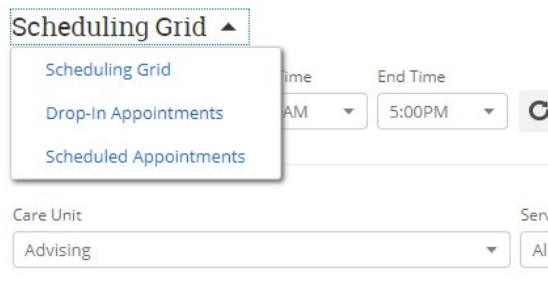
Check In Todd Ackerman

Cancel Check in

Cancel Appointment Check In Appointment Delete Appointment Close

Using Scheduled Appointments

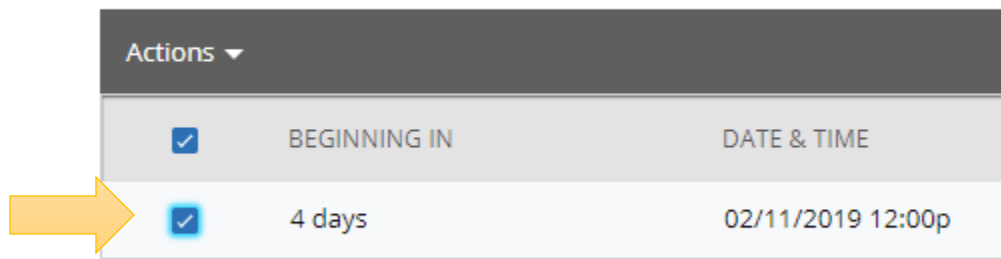
1. Use the Scheduling Grid drop down to select Scheduled Appointments



The screenshot shows a dropdown menu titled "Scheduling Grid" with three options: "Scheduling Grid", "Drop-In Appointments", and "Scheduled Appointments". Below the menu, there are input fields for "Start Time" (set to 8:00AM) and "End Time" (set to 5:00PM), a "Care Unit" dropdown (set to "Advising"), and a "Service" dropdown (set to "All").

2. Under Upcoming Appointments, click the box next to the student who needs checked in.

Upcoming Appointments

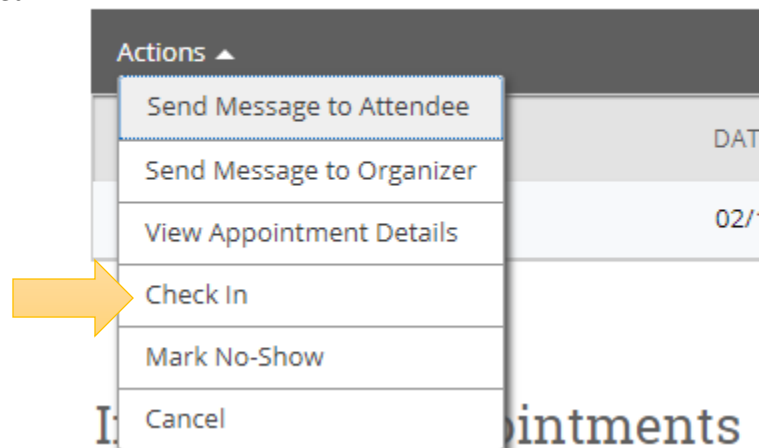


The screenshot shows a table titled "Upcoming Appointments" with a header row "Actions" and a sub-header row "BEGINNING IN DATE & TIME". The first column contains checkboxes. A yellow arrow points to the checkbox in the second row, which is checked. The second row also shows "4 days" and "02/11/2019 12:00p".

Actions	BEGINNING IN	DATE & TIME
☒	4 days	02/11/2019 12:00p

3. Use the Actions drop down to select Check In. This will send a notification to the advisor that the student has arrived for their appointment.

Upcoming Appointments



The screenshot shows the "Upcoming Appointments" table with the "Actions" dropdown menu open. The menu options are: "Send Message to Attendee", "Send Message to Organizer", "View Appointment Details", "Check In", "Mark No-Show", and "Cancel". A yellow arrow points to the "Check In" option.

Actions	BEGINNING IN	DATE & TIME
☒	4 days	02/11/2019 12:00p

How to Schedule an Appointment

Appointment Center

1. In the grid of the chosen advisor, click on the time that you want to schedule the appointment.

Appointment Schedule For Tuesday, July 16, 2019

	Amanda Brodish	Mary Napoli	Jessica Watson
	Drop In		Drop In
8 AM			
9 AM	ENGR-Academic Advising - 1s...		
10 AM			

Staff Available for Appointment

Mary Napoli
2019-07-16
9:00 am

Click to create an appointment.

Study Skills Inventory

2. Click the Service or type of appointment that you want to schedule. If the appointment that you are looking for isn't in the drop down, that advisor hasn't made themselves available for that appointment.
3. Search for the student's name.
4. Select the reminders that you want to set up for the organizer and attendee.
5. Click Create Appointment.

CREATE AN APPOINTMENT

Service

Study Skills Inventory

Show All Services for this location

Organizer

Mary Napoli

Student

Enter Student Name

Create a Student

When

07/16/2019

1:00pm

45 min

Comments

Enter comments

Options

☐ Student has checked in for appointment
 ☐ Send E-mail Reminder to the organizer attendee
 ☒ Send E-mail Reminder to non organizer attendees
 ☐ Send Text Reminder to the organizer attendee
 ☒ Send Text Reminder to non organizer attendees

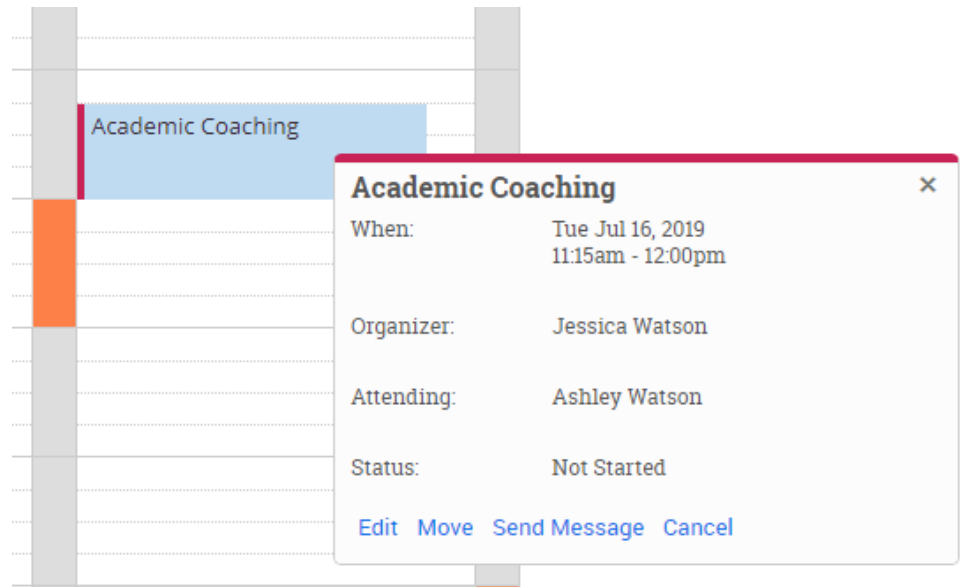
Cancel

Create Appointment

How to Cancel an Appointment

Appointment Center

1. Hover over the appointment you want to cancel on the Scheduling Grid. A snapshot of the appointment appears. Click Cancel.



2. Select who wants to cancel the appointment and the reason for the cancelation from the drop down menus. Click Cancel Appointment.

CANCEL APPOINTMENT

Cancel Appointment For:

Select Who to Cancel

Reason:

Select A Reason

Comments:

Close

Cancel Appointment

How to Search for a Student

1. Under the name of the location, type the student's name into the box and hit enter.

Study Lab - G-1 GSCC

2. After selecting the student, you will see limited information about that student and given a few action options.

Scheduling Grid ▼

Study Lab - G-1 GSCC

Blake Rhoades



Blake Rhoades

ID:

@pitt.edu

Undeclared

Advisors: none

Tutors: none

[Send Message](#)

[Schedule General Event](#)

[Track Time](#)

[Record Visit](#)

[Add to Staff Queue](#)

3. The only information you have on a student is their PeopleSoft number, email, advisors, and major.

You will be able to Schedule a General Event which is an appointment.

You will be able to send a message to the student.

You will be able to Add to Staff Queue which is a Drop In appointment.

How to Schedule a General Event

1. Under the name of the location, type the student's name into the box and hit enter.

Study Lab - G-1 GSCC

2. After selecting the student, click on Schedule a General Event.

Scheduling Grid ▼

Study Lab - G-1 GSCC

Blake Rhoades



Blake Rhoades

ID:

@pitt.edu

Undeclared

Advisors: none

Tutors: none

[Send Message](#)

[Schedule General Event](#)

[Track Time](#)

[Record Visit](#)

[Add to Staff Queue](#)

3.

Schedule Appointment

Filters

Care Unit

Location

Service

Course

Comments

Select a Date

January 2019						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

People Attending (1)

Select Advising in Care Unit

Set location meeting in Location

Choose type of appointment in Service

If appropriate, select the Course if needed

If desired, Comments could be added

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

Select An Organizer

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

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. 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							
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	☐ 0/1	DROP-IN	☐ 0/1
9:00am - 9:30am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
9:30am - 10:00am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
10:00am - 10:30am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1
10:30am - 11:00am		DROP-IN	CONFLICTS	CONFLICTS	☐ 0/1	DROP-IN	☐ 0/1

6. Click Save Appointment

Save Appointment

Cancel

How to Add a Student to a Staff Queue

Drop In Appointments

1. Under the name of the location, type the student's name into the box and hit enter.

Study Lab - G-1 GSCC

Scheduling Grid ▼

2. After selecting the student, click on Add to Staff Queue.

Study Lab - G-1 GSCC

Blake Rhoades



Blake Rhoades

ID:

@pitt.edu

Undeclared

Advisors: none

Tutors: none

[Send Message](#)

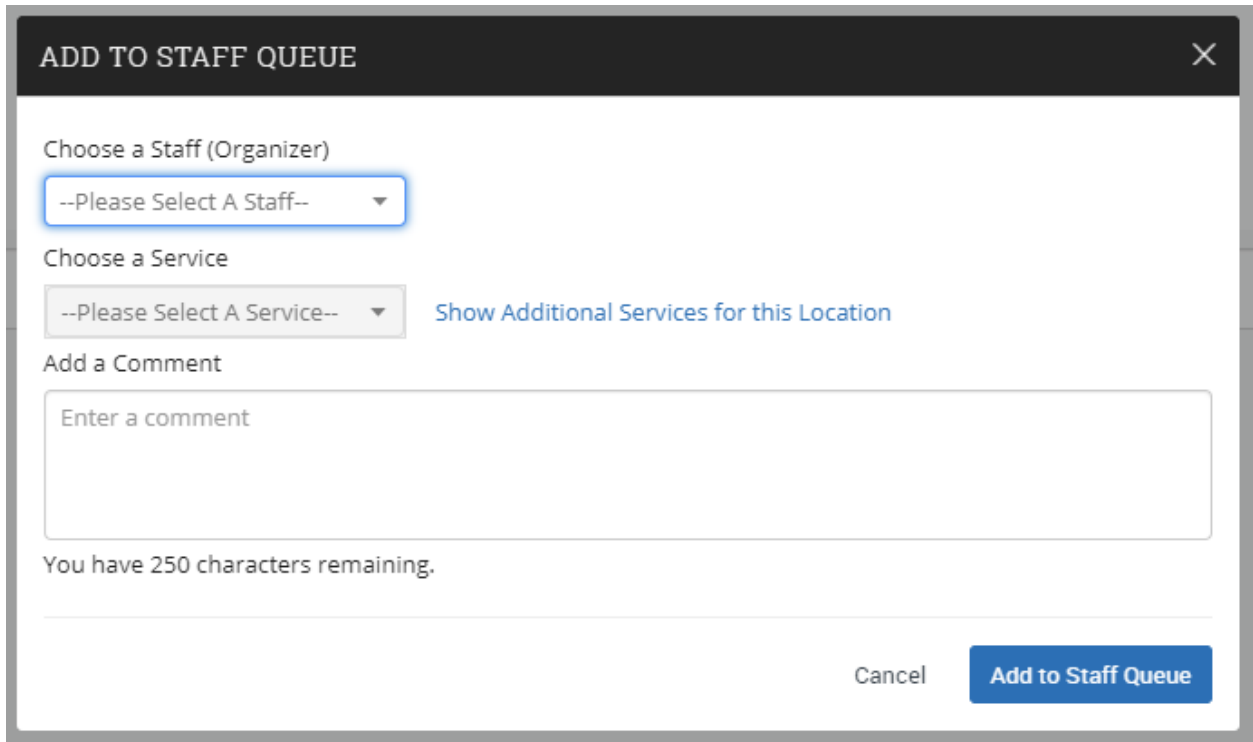
[Schedule General Event](#)

[Track Time](#)

[Record Visit](#)

[Add to Staff Queue](#)

3. Select the Staff (Organizer) and the Service. You can also add a comment for the advisor. Once finished, click Add to Staff Queue. The student will be added to the staff member's queue and the staff member will be notified.



The screenshot shows a modal dialog box titled "ADD TO STAFF QUEUE" with a close button (X) in the top right corner. The dialog contains the following elements:

- A label "Choose a Staff (Organizer)" above a dropdown menu with the text "--Please Select A Staff--".
- A label "Choose a Service" above a dropdown menu with the text "--Please Select A Service--".
- A link "Show Additional Services for this Location" to the right of the service dropdown.
- A label "Add a Comment" above a text input field with the placeholder text "Enter a comment".
- A character count "You have 250 characters remaining." below the comment field.
- At the bottom right, there are two buttons: "Cancel" and "Add to Staff Queue".

Please note: If Drop In hours are not currently happening, you cannot add a student to the advisor's queue.

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

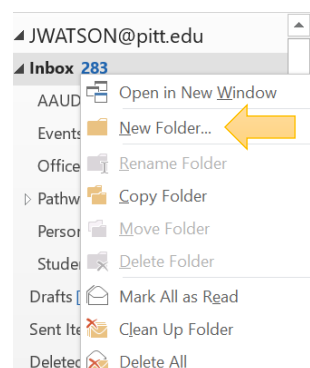
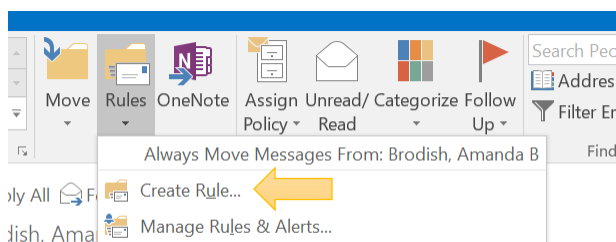
Service: Type of appointment

Alert: The name EAB gave to referrals

Case: Process of how a user manages referrals in Pathways

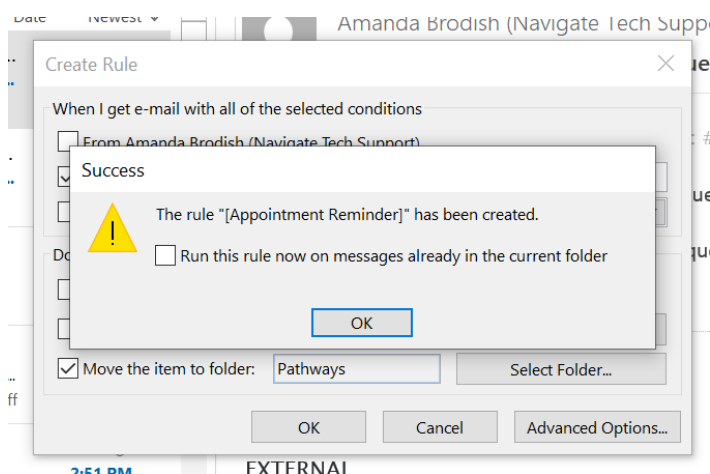
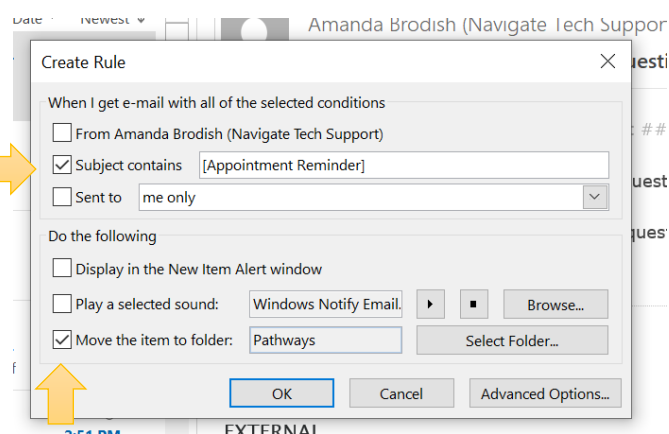
How to Create a Rule in Outlook for Appointment Reminder Emails

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".



filter instructions

3. 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.



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 .