



Office of the Provost

Pathways Training Documentation

For Advisors

Pathways Team
3-25-2026

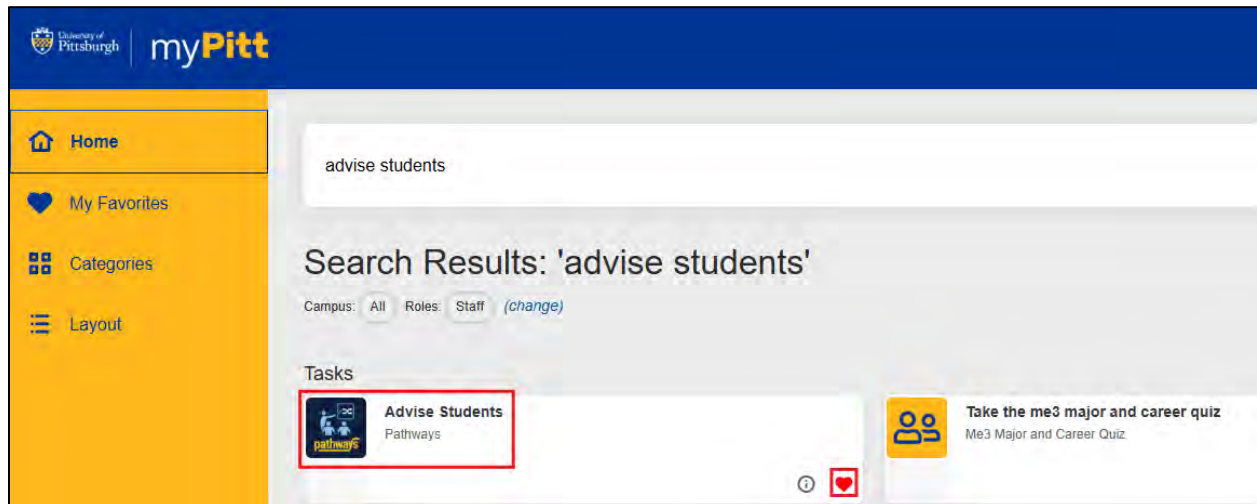
Table of Contents

How to Log Into Pathways	3
How to Search for a Student	4
How to Sync Your Calendar	4
How to Create Availability for Appointments	7
How to Schedule an Appointment From the Student's Page	12
Schedule an Appointment from Your Assigned Student List, or an Advanced Search or Report	12
Appointment Scheduling Options	14
How to Complete an Appointment Summary Report	16
How to Create an Ad hoc Appointment Summary Report	18
FROM THE STUDENT'S PAGE	18
FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT	19
How to Mark an Appointment as a No Show	21
How to Cancel an Appointment	22
FROM YOUR UPCOMING APPOINTMENTS TAB	22
FROM YOUR CALENDAR	24
How to Edit an Appointment	26
How to Add a Note to a Student's Page	27
FROM THE STUDENT'S PAGE	27
FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT	27
How to Make a Referral for a Student.....	28
How to View Notes and Appointment Summary Reports	29
How to Create a Student List	30
How to Add Students to an Existing Student List	33
How to Upload a Student List via Batch	35
How to Create a Saved Search.....	37
How to Access Your Saved Search	40
How to Create an Appointment Campaign	41
How to Add a Student to an Existing Campaign	49
TO ADD STUDENTS	50

How to Remove a Student from a Campaign	52
Frequently Used Terms and Definitions	53
How to Create a Rule in Outlook for Appointment Reminder Emails.....	54
Classic Outlook.....	54
New Outlook.....	55

How to Log Into Pathways

1. Pathways can be found by searching for the “Advise Students” resource on my.pitt.edu. This is the live site where you can set up availability, complete notes and reports, and message students. It is recommended to access the platform through the Chrome browser. You also have the option to add this to *My Favorites* in myPitt by clicking on the heart for easy access to the platform in the future.



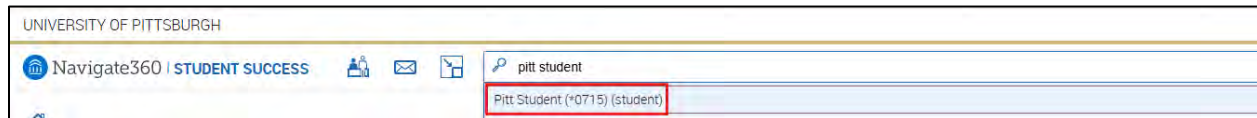
2. Once you select “Advise Students”, you will be prompted to sign in via Pitt Passport (SSO). *Pathways can only be accessed through SSO.*

If you have trouble accessing Pathways, please contact PathwaysHelp@pitt.edu for assistance.

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 Search for a Student

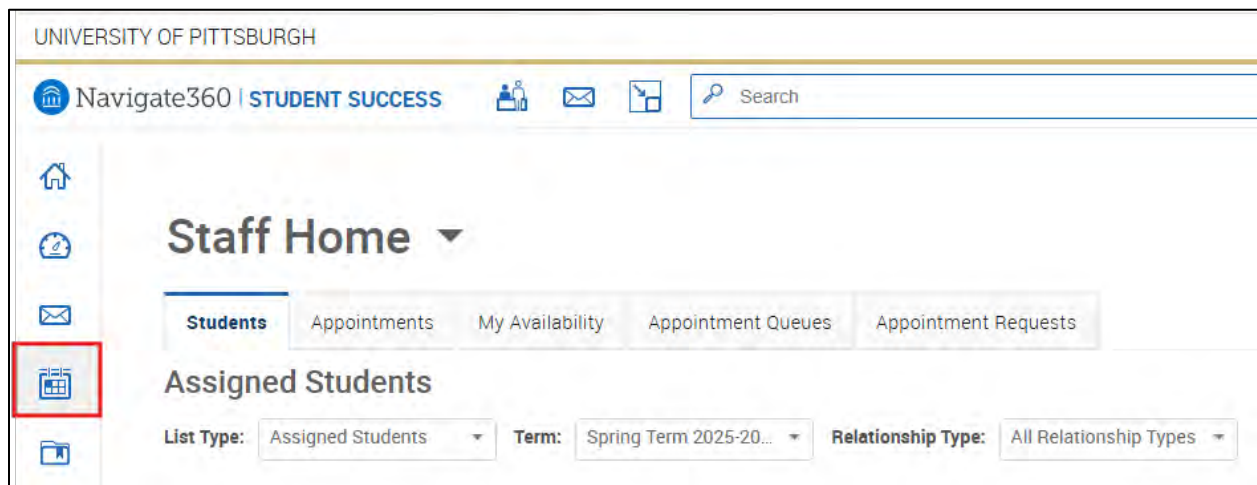
1. To search for a student, simply click on the "Search" box in the top-center of the page and type in the name of the student. Select the student's name to view the student's page.



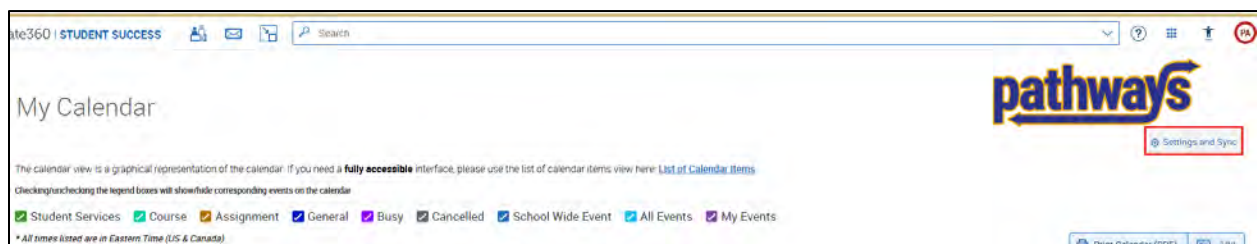
How to Sync Your Calendar

Sync your calendar ONLY on the live/production site, not the training site

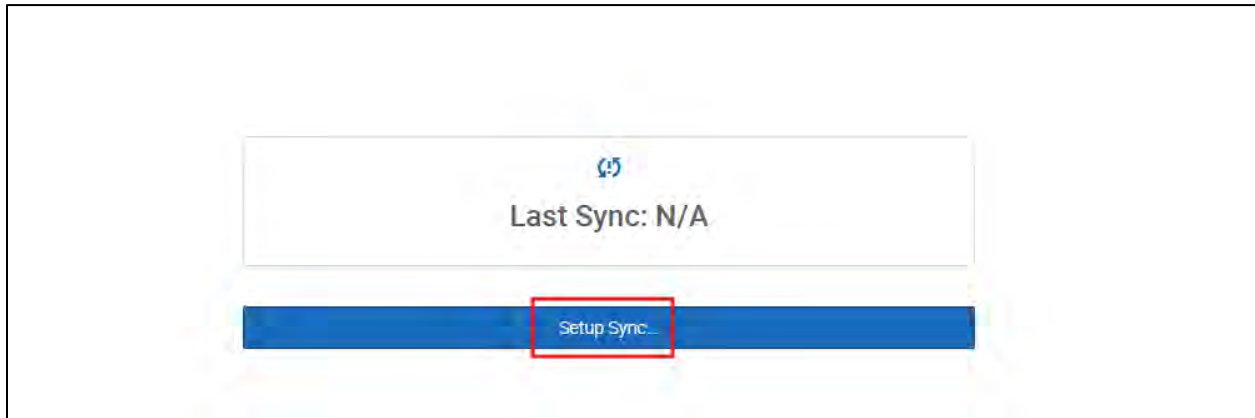
From your Staff Home page, select the Calendar icon on the left-hand side of the screen.



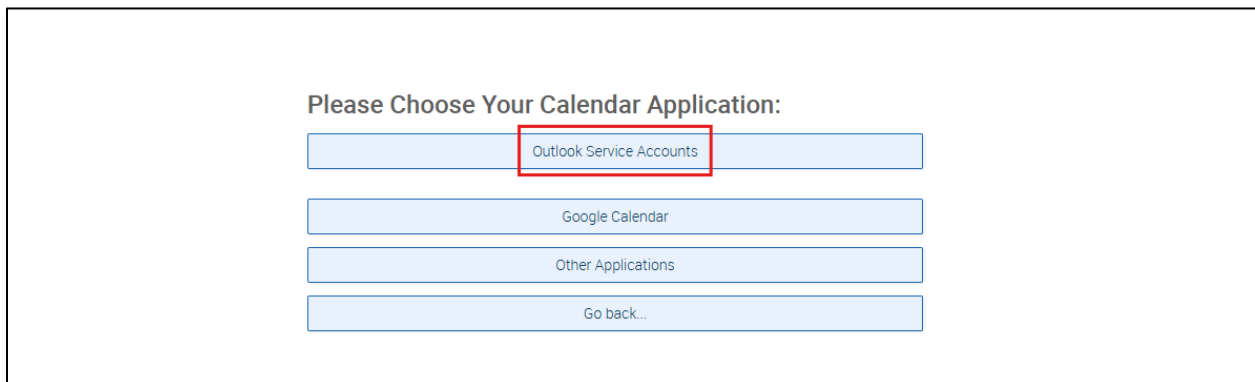
On the right-hand side of the screen, select the Settings and Sync button.



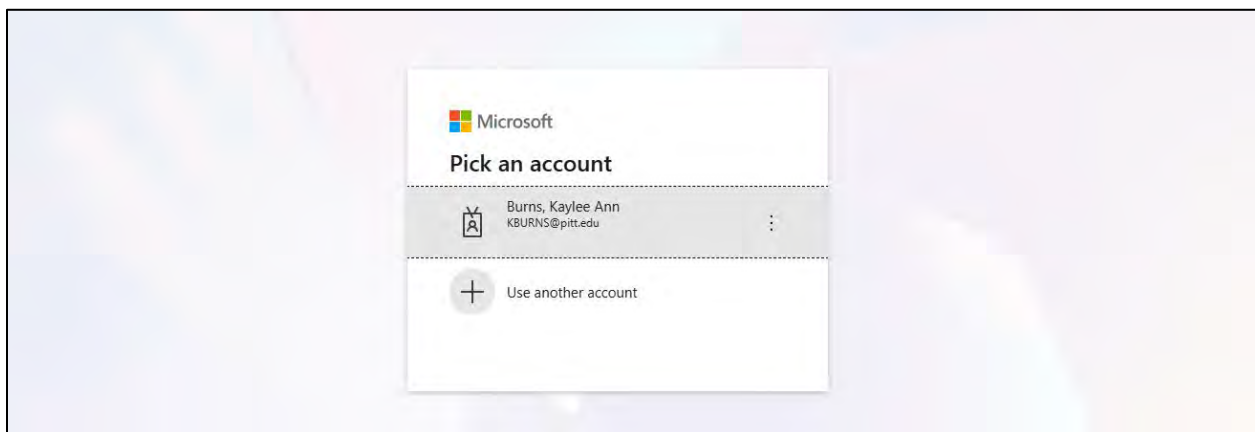
On the next screen, select the Setup Sync button.



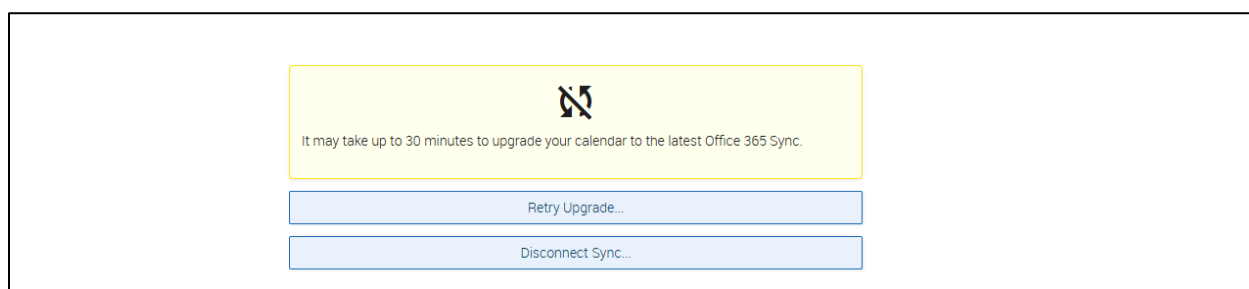
You will then be prompted to select your Calendar Application. Select Outlook Service Accounts. This is the only way your calendar will sync correctly.



Choose your Microsoft Pitt account.



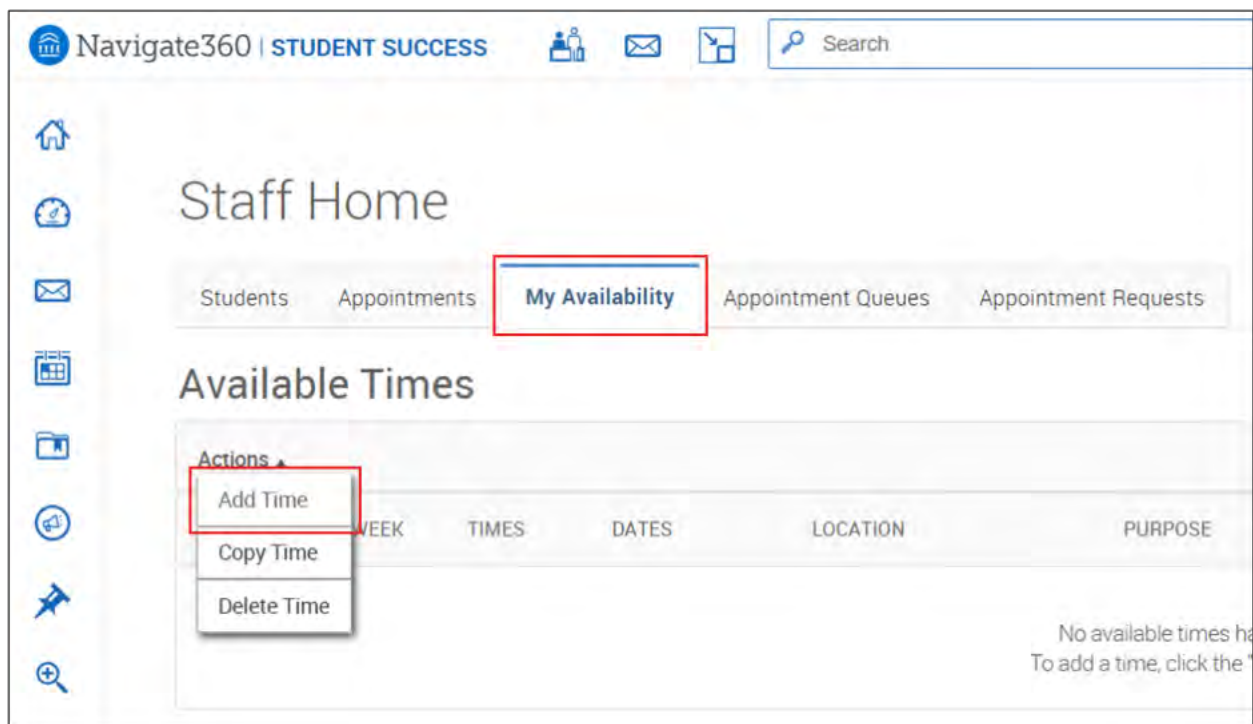
After signing into your Pitt account, you will see a yellow banner at the bottom right-hand side of the page indicating that sync was successful. You should then see the screen below:



How to Create Availability for Appointments

The instructions below can be followed to set up your availability for students to meet by Appointment only. It is recommended to set up separate blocks of availability if you would like to meet with students via Drop-In hours.

[Log into Pathways](#) and choose the My Availability tab on your Staff Home page. Under “Available Times”, use the Actions button to Add Time.



In the box that pops up, select the days and times you are available. To set the same availability for the entire term, choose the current term (Default Term) for the length of time to be active.* Then, choose the Appointments option. (You'll be able to add additional days and times in a later step.)

**Note: if you choose Forever, then your availability will continue during and in between terms, as well as summer.*

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed **Thu** Fri Sat Sun

From 8:00am To 5:00pm

All times listed are in Eastern Time (US & Canada)

How long is this availability active?

Please select a duration

Add to your personal availability link?

☐ Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

If you would like to create a link that can be posted on Canvas or that you can send to your students that will direct them to view your drop-in times, select the box to Add to your personal availability link, as seen below:

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed **Thu** Fri Sat Sun

From 8:00am To 5:00pm

All times listed are in Eastern Time (US & Canada)

How long is this availability active?

Please select a duration

Add to your personal availability link?

☐ Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Select the type of meeting (In-person and/or Virtual).

Make the appropriate selections from the Care Unit, Location and Services drop-down menus.

If you select Virtual meeting type, you can add a URL, such as your Zoom Personal Meeting ID (PMI) or phone number. This information will be sent to the student when they schedule the appointment.

ADD AVAILABILITY

What type of availability is this?

Appointments | Drop-ins | Campaigns

Meeting Type
Virtual

Care Unit
Please select a care unit

Location
Please select a location

Services
Please select services

URL / Phone Number
https://pitt.zoom.us/j/1111111111

Special Instructions for Student
B I [Rich Text Editor Icons]
e.g. room Z3, please bring paper

Cancel Save

Add any Special Instructions you would like the students to see when they are scheduling an appointment. The sample text you see here is included below in the *Tip* section if you would like to copy.

ADD AVAILABILITY

Appointments | Drop-ins | Campaigns

Meeting Type
Virtual

Care Unit
Please select a care unit

Location
Please select a location

Services
Please select services

URL / Phone Number
https://pitt.zoom.us/j/1111111111

Special Instructions for Student
B I [Rich Text Editor Icons]
If you choose an in-person meeting, we will meet in my office at [YOUR OFFICE LOCATION HERE].
If you choose a virtual meeting, please make sure you are on your computer and signed into my.pitt.edu and use the provided zoom meeting URL.

Cancel Save

Tip: Include special instructions to provide the students with important information.

If you choose an in-person meeting, we will meet in my office at **[YOUR OFFICE LOCATION HERE]**.

If you choose a virtual meeting, please make sure you are on your computer and signed into my.pitt.edu and use the provided zoom meeting URL.

If you would like to have group appointments, you can adjust the Max Number of Students per Appointment, otherwise, leave it at 1 and Select the [Save](#) button.

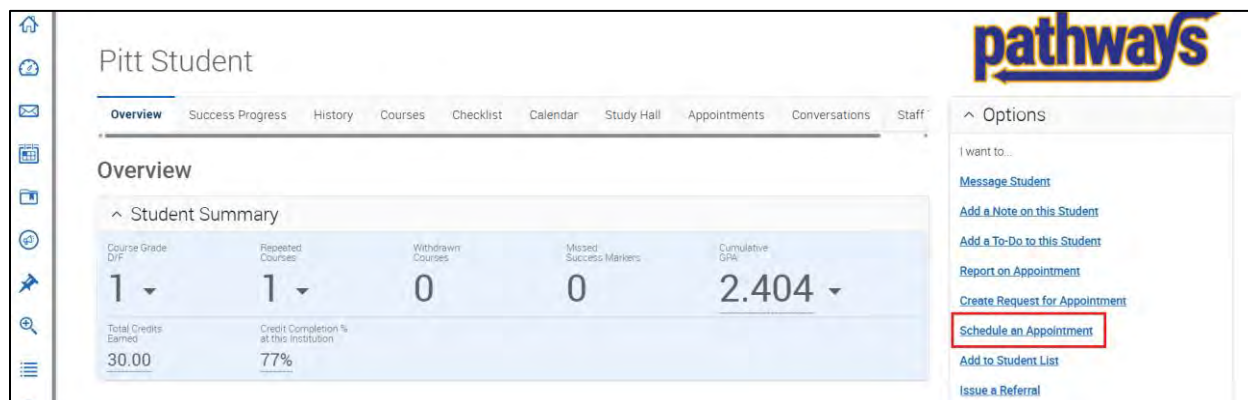
To add additional availabilities, select the checkbox beside the time you have created, and use the *Actions* drop-down to Copy this time. You can also use the blue [Edit](#) link to edit a specific block. You can have as much availability as you need.

Staff Home									
Students Appointments My Availability Appointment Queues Appointment Requests									
Available Times									
Actions									
	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	PERSONAL LINK	MEETING TYPE	
☒	Tue, Thu	8:00am - 5:00pm	Spring Term 2025-2026	Student Success Hub	Academic Coaching (Virtual) For Appointments	Student Services	No	Virtual	Edit

* All times listed are in Eastern Time (US & Canada)

How to Schedule an Appointment From the Student's Page

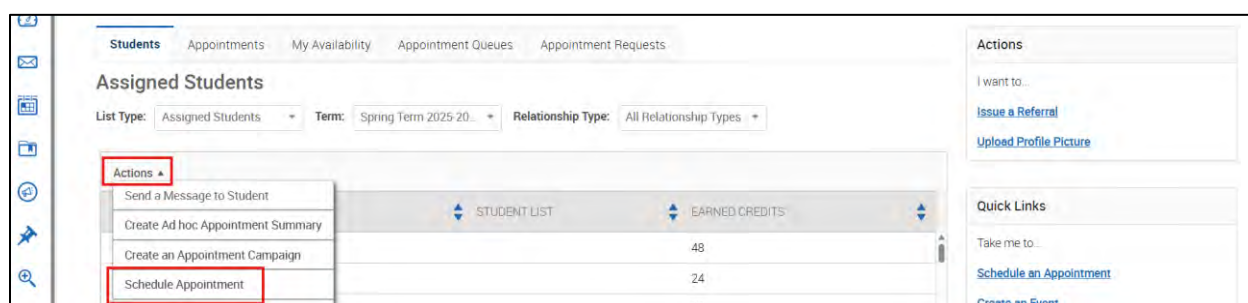
From the student's page, select the [Schedule an Appointment](#) link from the *Options* container.



Then, follow steps in the next section to select the Appointment Scheduling Options.

Schedule an Appointment from Your Assigned Student List, or an Advanced Search or Report

To schedule an appointment from your *Assigned Students* list, on your *Staff Home* page, select the student(s) you would like to schedule an appointment for and using the *Actions* drop down menu, select the Schedule Appointment option.



To schedule an appointment via an *Advanced Search* or *Report*, go to the left-hand side menu and select *Advanced Search* or *Reporting*, respectively.

Advanced Search (example):

Search

Unsaved Student Search [Save](#)

Enrollment Terms: Spring Term 2025-2026 [x](#) My Students Only [x](#)

Search [Modify Search](#)

Actions ▲

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment**
- Tag

STUDENT LIST	CUMULATIVE GPA	MAJOR	CLASSIFICATION	CATEGORY
	2.703	Geology	Sophomore	2024 A&S First Year 11/04/2025,FA Ac Resident,Pittsburg
	3.566	Undeclared	Sophomore	2024 A&S First Year Progress (2026) -

Reporting (example):

Field **Condition** **Value**

1 Enrollment Terms [x](#) contains any [x](#) Spring Term 2025-2026 [x](#)

[+ Add Filter](#)

☐ Include Inactive Users ☒ Include My Students Only

[Run Report](#)

Report Results

Actions [Search in Results](#)

- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment**
- Tag
- Note
- Issue Referral

EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES	TAGS	MAJORS
abc123@pitt.edu	1234567		Enrollment Appointment 11	OTP-Expert Tag	Geology
def456@pitt.edu	1111117		Dorm - Bouquet Gardens G...	OTP-Expert Tag	Undeclared
ghi789@pitt.edu	2222226		First Year,First Generation ...		Africana Studies,Public Hea...

Then, follow steps in the next section to select the appointment scheduling options.

Appointment Scheduling Options

Select the Care Unit, Location, Service and Meeting Type for the appointment. And select the Radio Button beside the organizer's name.

Schedule Appointment

Filters

- Care Unit: Student Services
- Location: Student Success Hub
- Service: SSH Academic Success Appointment
- Course: [Search]
- Meeting Type: Select meeting type

People Attending (1)

- Student, Pitt (Student)
- Available Slots Left in Appointment (0)

Select An Organizer

- ☒ Advisor, Pitt

Additional Slots

Add an Attendee [Search] [Add] [Remove]

Available Times

For: Appointments Tue, Fri 8:00am - 5:00pm ET

Next, add any Comments. Use the Calendar to Select a Date. Then Select the checkbox for the specific block of time for the appointment.

Comments

Select a Date

February 2026

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

Reminders

- ☒ Send E-mail Reminder to the organizer attendee?
- ☒ Send E-mail Reminder to non organizer attendees?
- ☒ Send a text reminder to the organizer attendee?
- ☒ Send a text reminder to non organizer attendees?

Choose A Time To Meet

Length: [Dropdown]

Availabilities: [Show Availabilities for This Course/Service]

TIME SLOT	02/15 (SUN)	02/16 (MON)	02/17 (TUE)	02/18 (WED)	02/19 (THU)	02/20 (FRI)	02/21 (SAT)
2:00pm - 2:30pm ET	CONFLICTS	CONFLICTS	CONFLICTS	CONFLICTS	☒ 0/1		
3:00pm - 3:30pm ET	CONFLICTS	CONFLICTS	CONFLICTS	CONFLICTS	☐ 0/1		
3:30pm - 4:00pm ET					☐ 0/1		
4:00pm - 4:30pm ET					☐ 0/1		
4:30pm - 5:00pm ET					☐ 0/1		

Use the Availabilities dropdown menu to see additional options if default times do not display any checkboxes and available time.

Select a Date

February 2026

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

Choose A Time To Meet

Length: [Dropdown]

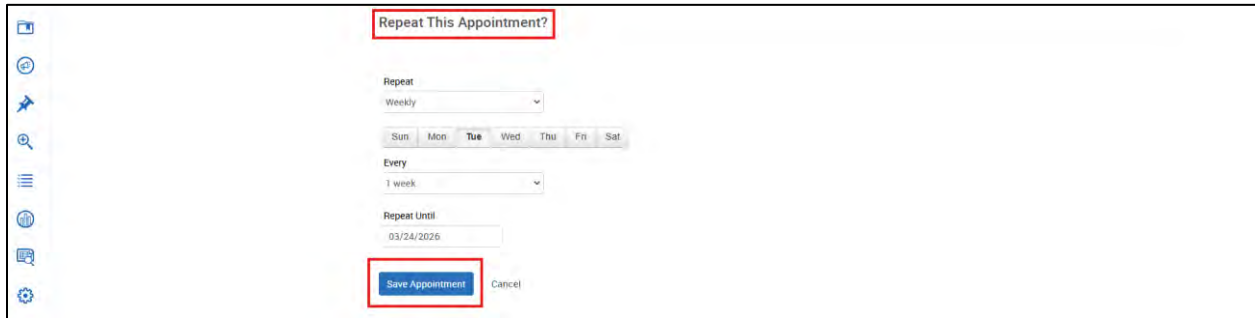
Availabilities: [Show Availabilities for This Course/Service]

TIME SLOT	02/15 (SUN)	02/16 (MON)	02/17 (TUE)	02/18 (WED)	02/19 (THU)
8:00am - 8:30am ET					

Availabilities:

- Show Availabilities for This Course/Service
- Show All Availabilities
- Unlock Non-Available Times
- Unlock Times With Conflicts

If the appointment is a reoccurring appointment, select the appropriate options Repeating Appointment options. Next, press the blue Save Appointment button.



The screenshot shows a web interface for scheduling appointments. On the left is a vertical sidebar with icons for home, calendar, appointments, search, list, analytics, chat, and settings. The main content area is titled "Repeat This Appointment?". Below the title are the following fields:

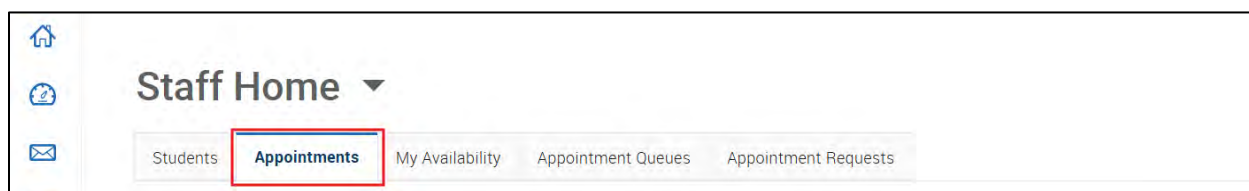
- Repeat:** A dropdown menu currently set to "Weekly".
- Days:** A row of buttons for the days of the week: Sun, Mon, **Tue** (highlighted), Wed, Thu, Fri, Sat.
- Every:** A dropdown menu currently set to "1 week".
- Repeat Until:** A date input field showing "03/24/2026".
- Buttons:** At the bottom, there is a blue "Save Appointment" button and a grey "Cancel" button.

You and the student will receive the relevant Appointment Notification emails, confirming the details of the appointment that you scheduled.

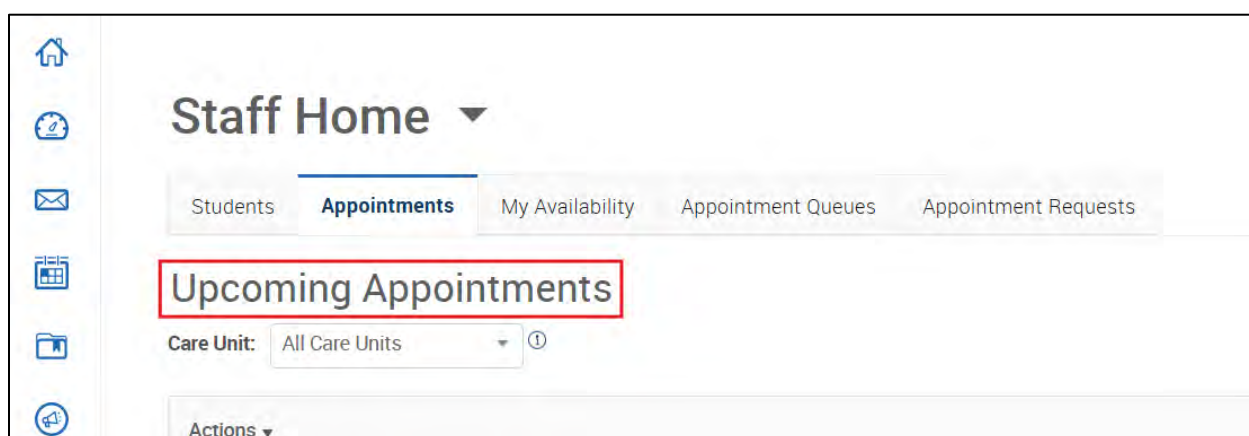
How to Complete an Appointment Summary Report

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.

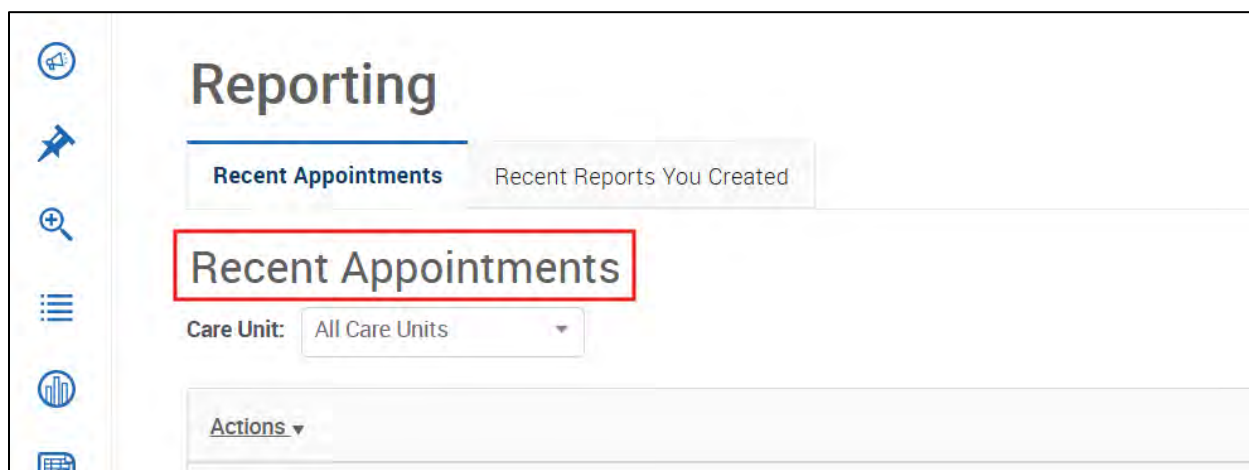
From your home screen, select the Appointments tab.



For current or upcoming appointments, go to the *Upcoming Appointments* section.



For past appointments, scroll down to the *Recent Appointments* section.



Select a student for whom you would like to create an Appointment Summary. Then, under *Actions*, select Add Appointment Summary.

Once complete, select **Save this Report** at the bottom of the page.

You will notice that the *Report Filed?* column will change from *Not Yet* to *Report Details* in the Recent Appointments section.

DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPORT FILED?
03/09/2026 3:41pm - 3:42pm ET (1m)	Academic Coaching (Virtual)	N/A		Student, Pitt	Report Details
02/24/2026 4:00pm - 4:30pm ET (30m)	SSH Academic Success Appointment	N/A		Student1, Pitt	Not Yet.

How to Create an Ad hoc Appointment Summary Report (For a Student Meeting Not Scheduled in Pathways)

FROM THE STUDENT'S PAGE

Select the **Report on Appointment** link from the *Options* container.

Pitt Student

Overview | Success Progress | History | Courses | Checklist | Calendar | Appointments | Staff Tasks

Overview

Student Summary

Course Grade D/F 1	Repeated Courses 1	Withdrawn Courses 0	Missed Success Markers 0	Cumulative GPA 2.404
Total Credits Earned 30.00	Credit Completion % at this institution 77%			

Options

- 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 a Referral](#)

Fill in the information needed to complete the Summary Report.

NOTE: Yes/No questions and the Course are not required to save the report. However, you must select a Care Unit as this will not be prepopulated.

APPOINTMENT REPORT FOR PITT STUDENT1

Appointment Details

SSH Academic Success Appointment
02/24/2026 4:00pm - 4:30pm ET

Care Unit
Student Services

Location
Student Success Hub

Service
SSH Academic Success Appointment

Course
Start typing to search all courses

Meeting Type
In Person

Date of visit
02/24/2026

Meeting Start Time
4:00pm

Meeting End Time
4:30pm

All times listed are in Eastern Time (US & Canada).

Attendees

Pitt Advisor
Advisor, Student
☒ Attended

Pitt Student1 - 4656004
Junior
Communication Science
☒ Attended

Checkin
Checkout

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

Date
Time

Summary Details For Pitt Student1

Assignments Discussed

Objectives of the Session

Study Skills Used

Goals for Next Session

Student arrived on time and was ready to begin our session. ☐ Yes ☐ No ☐ N/A

Student was prepared (attended class, read lesson, had notes, etc.)? ☐ Yes ☐ No ☐ N/A

Student asked for explanation of material not understood? ☐ Yes ☐ No ☐ N/A

Student responded positively to instruction (as you suggested)? ☐ Yes ☐ No ☐ N/A

Student was aware of future assignments? ☐ Yes ☐ No ☐ N/A

Student shows a better understanding of the material since our last session. ☐ Yes ☐ No ☐ N/A

Appointment Summary

Paragraph

Attachments

Attach File

Choose File No file chosen

Once complete, select Save this Report at the bottom of the page.

Cancel **Save this Report**

FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT

Select the student you would like to create an appointment summary for and using the Actions drop down menu, select the Create Ad hoc Appointment Summary option.

Assigned Students

Staff Home ▾

Students | Appointments | My Availability | Appointment Queues | Appointment Requests

Assigned Students

List Type: Assigned Students ▾ Term: Spring Term 2025-20... ▾ Relationship Type: All Relationship Types ▾

Actions ▴

- Send a Message to Student
- Create Ad hoc Appointment Summary**
- Create an Appointment Campaign
- Schedule Appointment

STUDENT	CUMULATIVE GPA	CATEGORY
2023 A&S First Year,2023 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sci...		
Scs,Active UGRD - School of Education,Admitted Test Optional,Dorm - Lothrop Hall		
Academic Progress (2026) - Satisfied,First Generation College Student,Good Academic		
Standing - 2244,Good Academic Standing - 2254,Junior,Kessler Scholars 2023,MIN		
of State,Resident Pittsburgh,Campus Pittsburgh,Campus Undergrad,Provost Schol		

Students Report

Report Results

Search in Results

Student Name	Tags	Major	Classification	Cumulative GPA	Student Is Active	Total Credit Hours Earned	Concentration	College	Degree
Student17_Pitt		Media & Prof Communicati...	Sophomore (Spring Term 2...	2.683	Yes	59.00	Digital Media	College of General Studies - ...	Bache
Add Staff Task		Public Health	Junior (Spring Term 2025-2...	3.611	Yes	84.00	NA	School of Public Health - U...	BS in F
Create Ad hoc Appointment Summary		Returning,MK Mc...	Applied Mathematics,Econ...	3.208	Yes	129.00	NA	Dietrich Sch Arts and Scienc...	Bache
Create an Appointment Campaign		Marketing,Human Resourc...	Junior (Spring Term 2025-2...	3.259	Yes	93.00	NA	School of Business - UCBA	BS in E
Schedule Appointment		Friedrick Honors College S...	Senior (Spring Term 2025-2...	3.875	Yes	103.00	NA/Pre-Physician Assistant	College of General Studies - ...	Bache
Student8_Pitt		Emergency Medicine	Senior (Spring Term 2025-2...	4.000	Yes	108.00	Sch Hlth & Rehabilitation SCS - ...	Sch Hlth & Rehabilitation S...	Bache

1 - 6 of 6 100 K < 1 > X

Because ad hoc appointment summaries also create an associated appointment, be sure to adjust the Date, Start Time and End Time to accurately reflect the approximate details of the meeting.

Meeting Type
In-Person X
Select Meeting Type

Date of visit
03/17/2026

Meeting Start Time 12:00pm **to** **Meeting End Time** 12:30pm

All times listed are in Eastern Time (US & Canada).

Attendees

- Pitt Advisor**
Advisor, Student
☒ Attended
- Pitt Student5**
Student, Tutor
☒ Attended

Attachments
Attach File
Choose File No file chosen

An appointment will be created after you submit this report. If a Meeting End

Complete the Appointment Summary following your department guidelines

How to Mark an Appointment as a No Show

From your Staff Home page, scroll down to the *Recent Appointments* section.

Reporting

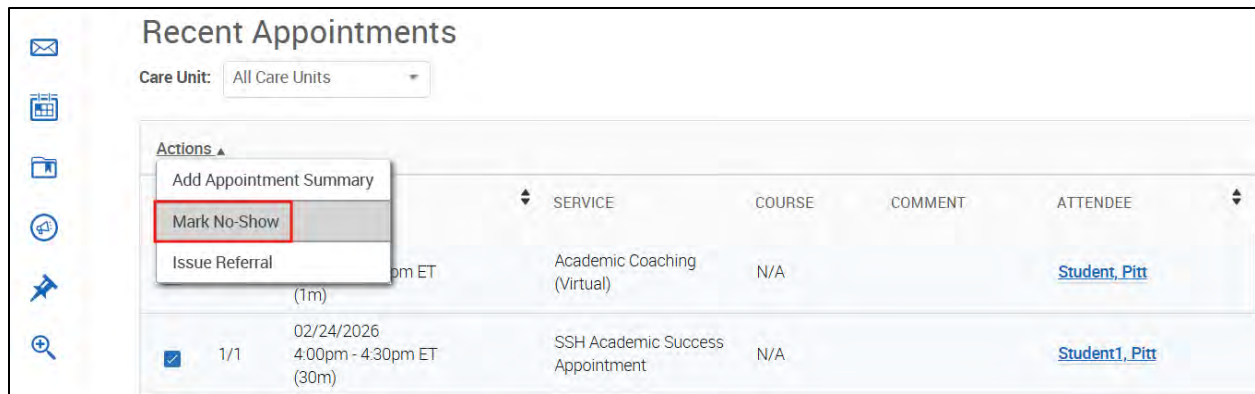
Recent Appointments Recent Reports You Created

Recent Appointments

Care Unit: All Care Units

Actions

Select the box next to the appointment you want to mark as a No Show. Under Actions, select Mark No-Show.



An Appointment Summary will open. You can add a note by selecting the Edit Report button at the bottom of the summary or simply close it.



You should then see a green No-Show box in the Report Filed column for this appointment.

How to Cancel an Appointment

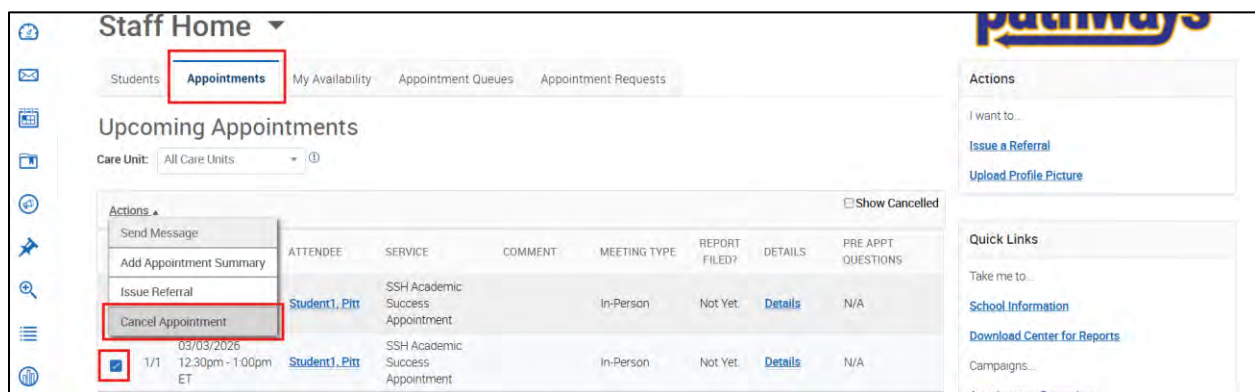
Appointments can be cancelled from your Upcoming Appointments section or from your calendar.

FROM YOUR UPCOMING APPOINTMENTS TAB

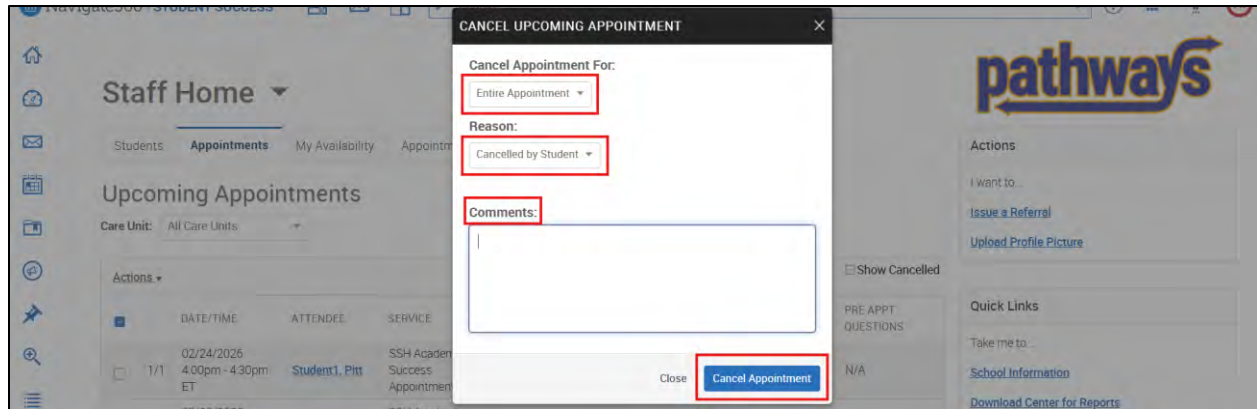
Go to the Appointments tab on your Staff Home page.

Next, select the checkbox beside the student/appointment you would like to cancel.

Use the Actions drop down button and select Cancel Appointment.

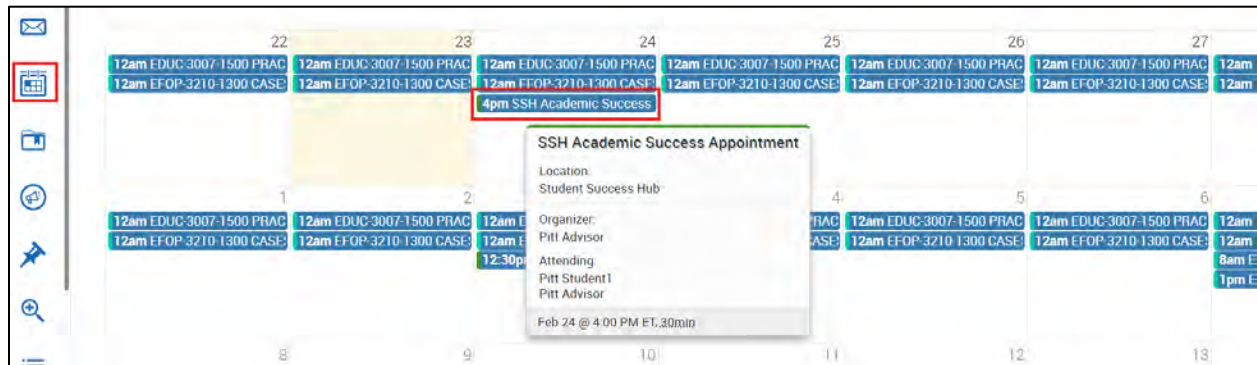


The Cancel Upcoming Appointment window will appear. Select whom to cancel the appointment for - Entire Appointment should be selected unless it is a group appointment. Then select the Reason. Add any Comments and press the blue Cancel Appointment button.

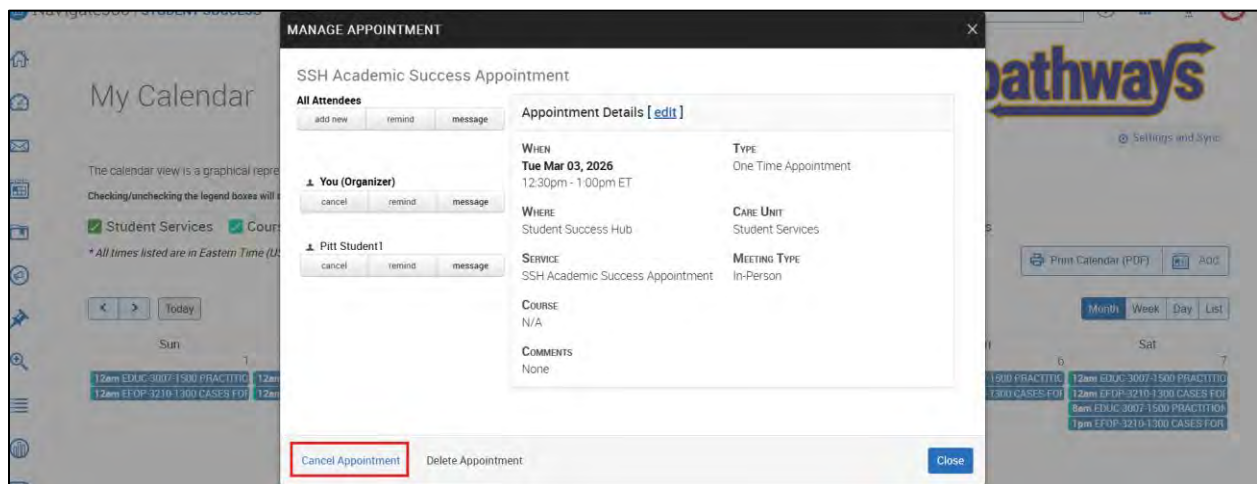


FROM YOUR CALENDAR

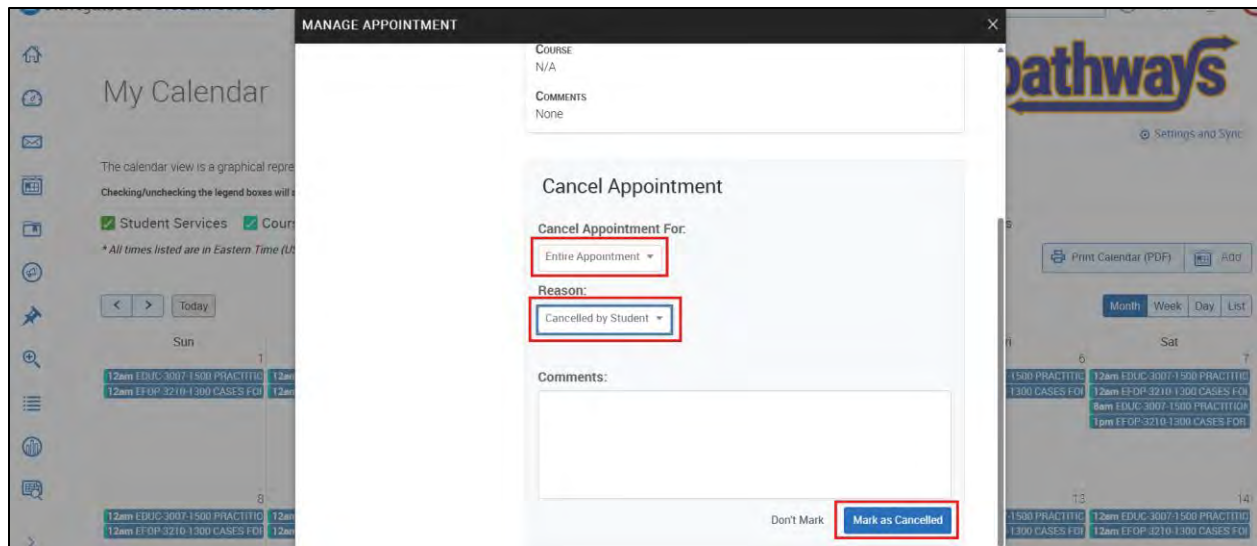
Your calendar can be accessed from the Calendar tab in the left-hand navigation menu.



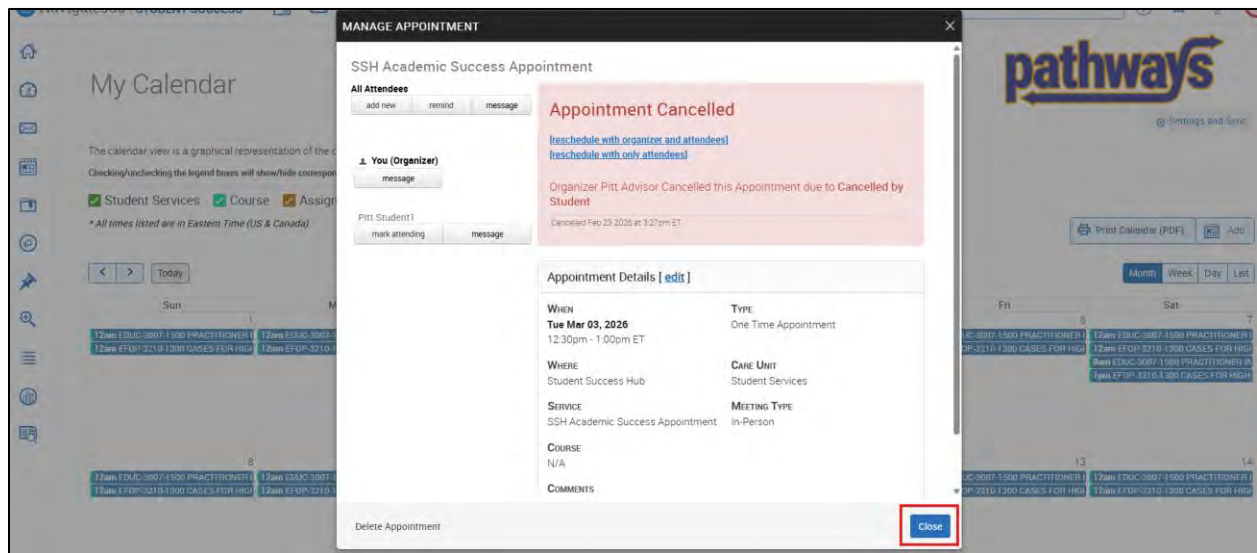
Click the appointment you would like to cancel, and the Manage Appointment pop up window will appear.



The Cancel Appointment section will appear. Select whom to cancel the appointment for - Entire Appointment should be selected unless it is a group appointment. Then select the Reason. Add any Comments and press the blue Mark as Cancelled button.



The Manage Appointment window will update, confirming the appointment cancellation. Click the blue Close button.

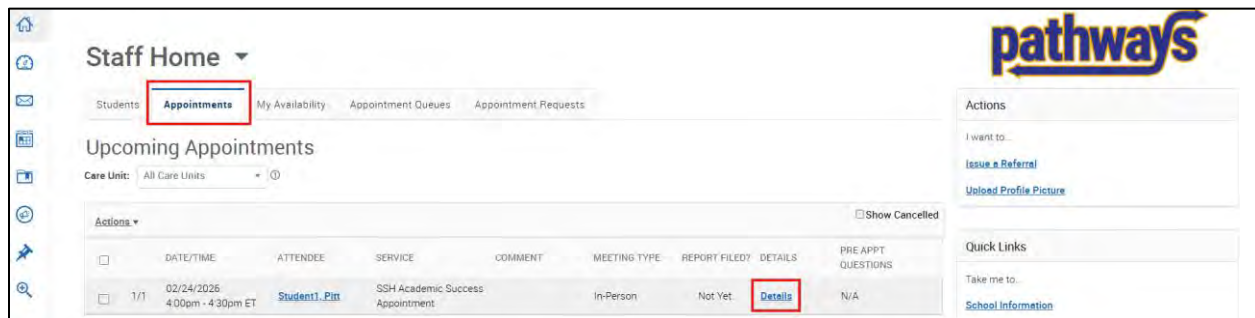


How to Edit an Appointment

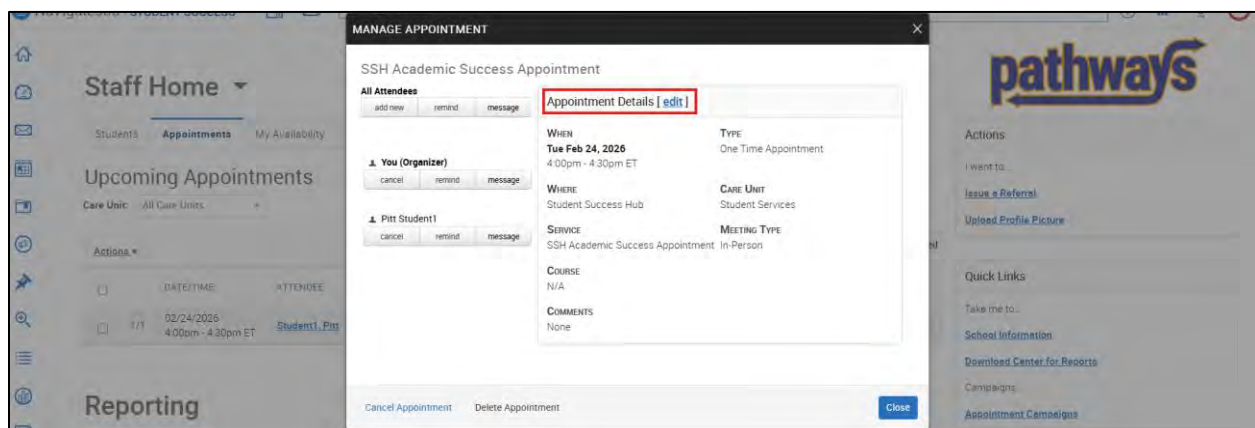
Appointments can be edited from either your calendar or the Upcoming Appointments section. This documentation shows how to edit an appointment from the Upcoming Appointments section, however if selecting an appointment from your calendar, the steps to edit will be the same.

Go to the Appointments tab on your Staff Home page.

Next, select the [Details](#) hyperlink for the student/appointment that you would like to edit.



The *Manage Appointment* window will appear. Select the [Edit](#) hyperlink.



Continue editing the appointment in the same manner that it was originally scheduled.

How to Add a Note to a Student's Page

Notes can be added to document information about a student or that you have shared with the student, or a specific topic of conversation that you had with the student. They differ from Appointment Summaries which should be used to document the general details of a meeting that you had with a student. Notes can be added in several different places across the platform.

FROM THE STUDENT'S PAGE

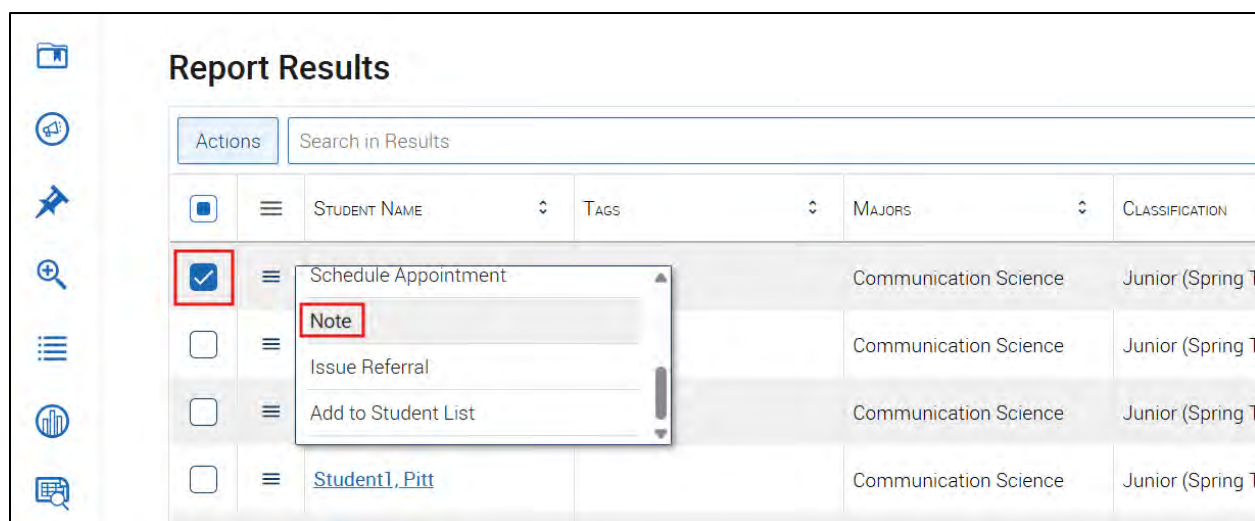
Select the [Add a Note on this Student](#) link from the Options container.



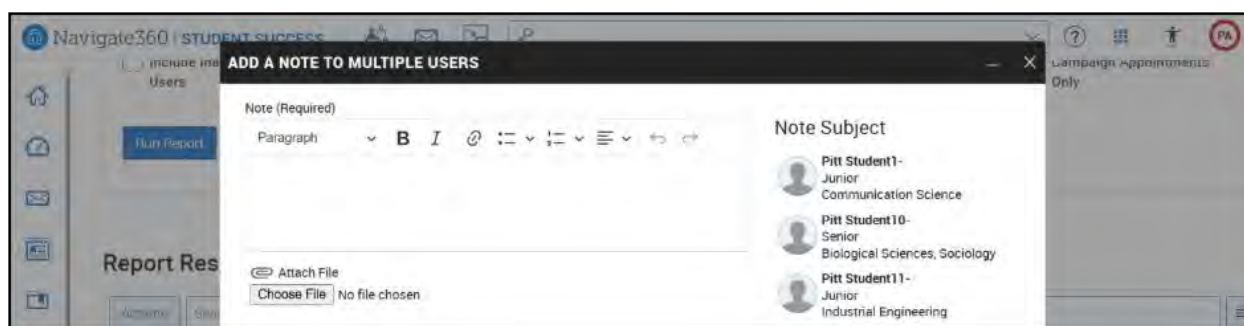
FROM YOUR ASSIGNED STUDENT LIST, OR AN ADVANCED SEARCH OR REPORT

Select the student(s) you would like to add a note for and using the Actions drop down menu, select the Note option.

Reporting



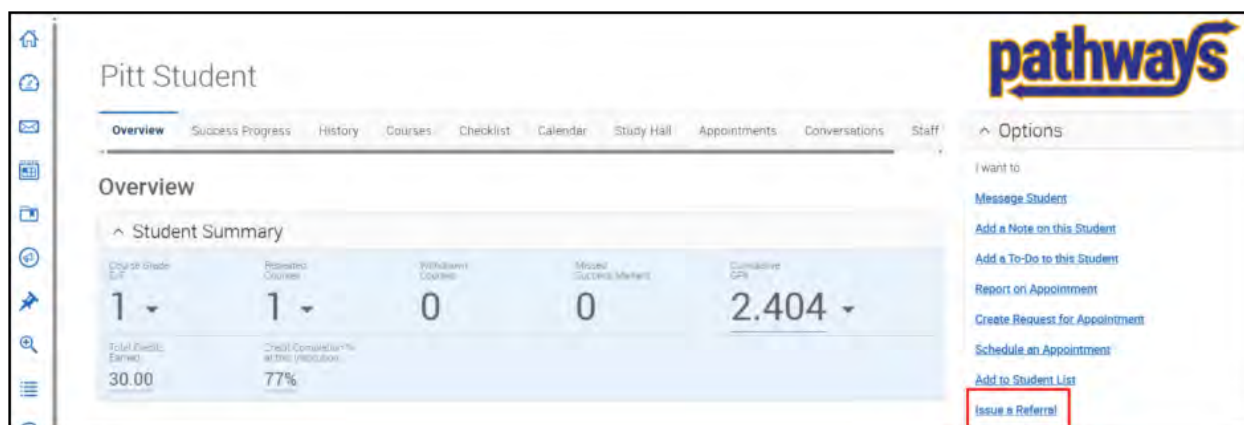
This is the easiest way to add a note for multiple students (up to 100 students) at the same time. Like messaging, the note appears to be added to each student individually.



How to Make a Referral for a Student

Referrals should be used for non-emergency situations only. For more information about referrals, click [here](#).

From the student's page, select **Issue a Referral** on the right-hand side of the screen in the **Options** container.

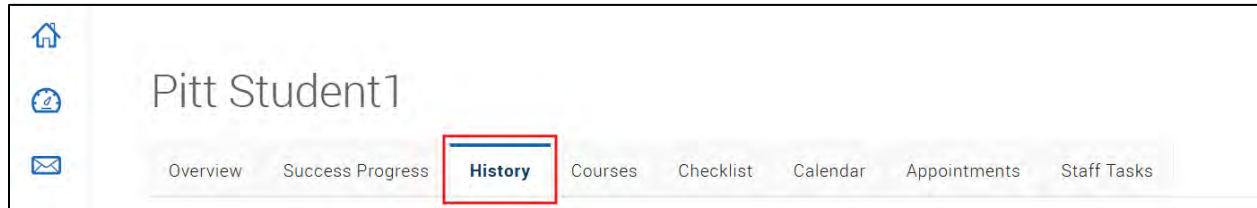


In the Referrals Window that pops up, use the drop-down menu to select a Referral Reason.

Next, add appropriate comments that will be helpful for the office receiving the referral. When you are finished, click the blue **Submit** button.

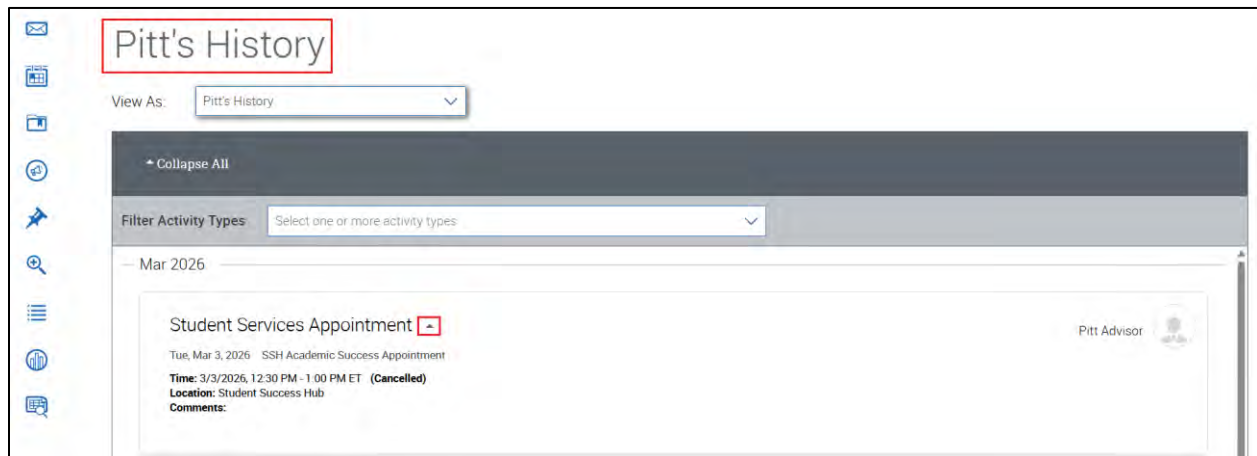
How to View Notes and Appointment Summary Reports

To view notes and appointment summary reports, go to the History tab on the student's page.



Once on the History tab, scroll down to the “[Student Name]’s History” section.

Here 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 details.



How to Create a Student List

To help keep track of a list of students, you can create a student list—a list of students manually created and maintained by a user that highlights a particular population. Student lists can be used for Advising Campaigns, sending communications, and as a self-created filter for searches and reports.

Select the checkboxes for students that you want to include in your student list. This can be done from your Assigned Students section, an Advanced Search, or from a Report.

NOTE: Selecting the checkbox at the top will only select students on the first page (or page that you are currently on). If you have more than 100 students, be sure to select the link that is displayed to “Select all items”, which will appear under the Actions bar once the checkbox at the top is selected.

Assigned Students

Staff Home

Assigned Students

List Type: Assigned Students Term: Spring Term 2025-20... Relationship Type: All Relationship Types

Actions

	NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY	AT RISK?
1.	Student1, Pitt	4656004	1 at-risk report, reach out about internships	3.807	2023 A&S First Year, 2023 Provost Scholar, Active UGRD - Dietrich Sch Arts and Sciences, Active UGRD - Sch Hlth & Rehabilitation Scs, Active UGRD - School of Education, Admitted Test Optional, Dorm - Lothrop Hall, Enrollment Appointment 10/30/2025, FA Academic Progress (2026) - Satisfied, First Generation College Student, Good Academic Standing - 2241, Good Academic Standing - 2244, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Education, Out of State Resident, Pittsburgh Campus, Pittsburgh Campus-Undergrad, Provost Scholar, SHE/HER, Sports Science Guarantee Yes, Undergraduate, Undergraduate Eligible to Apply for Graduation	No

Advanced Search

Staff Home

Assigned Students

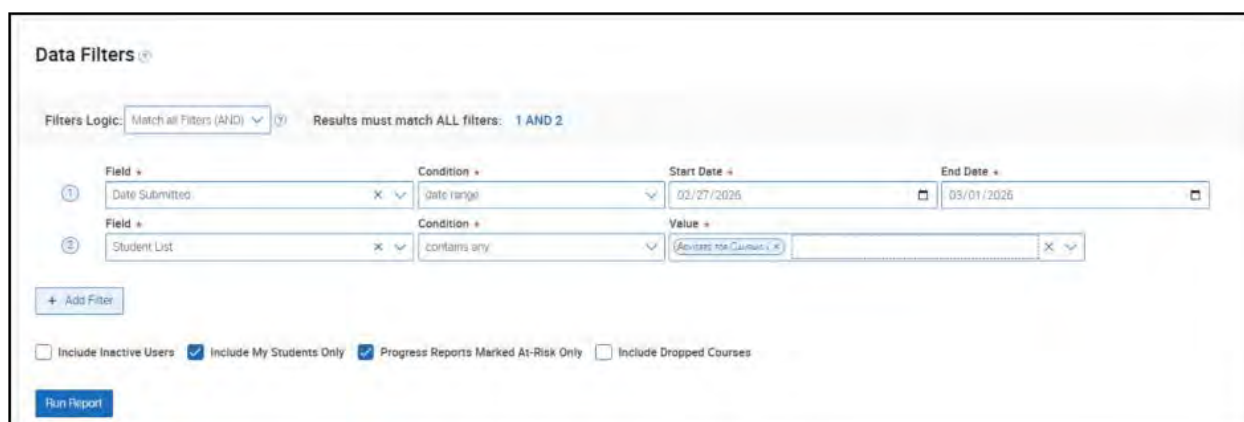
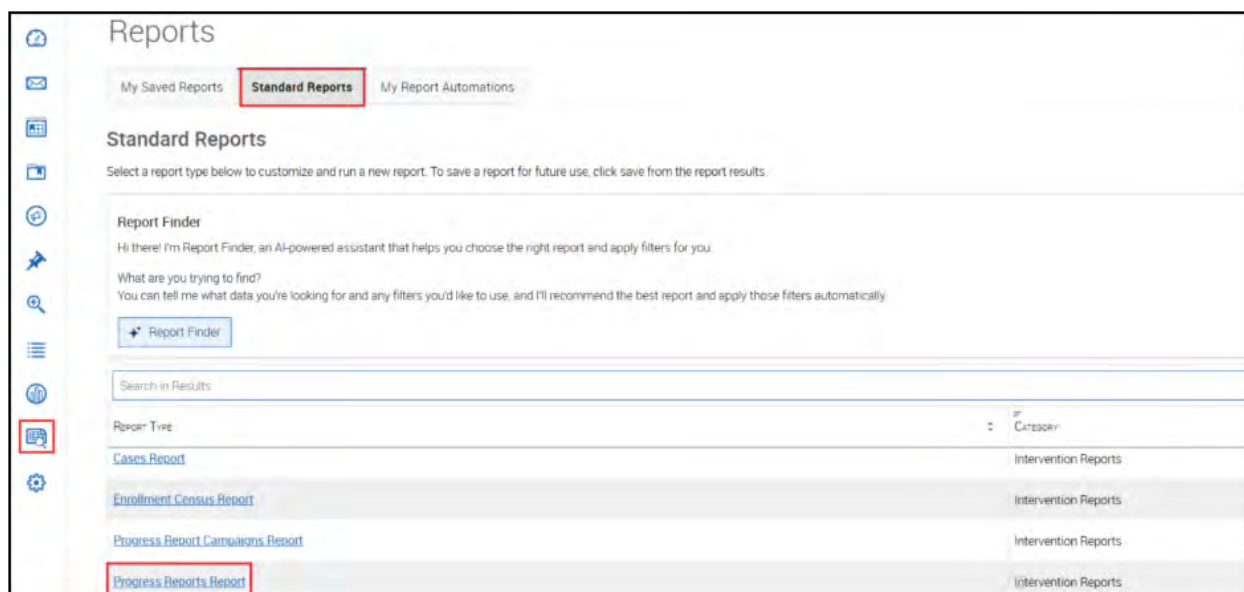
List Type: Assigned Students Term: Spring Term 2025-20... Relationship Type: All Relationship Types

Actions

	NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY	AT RISK?
1.	Student1, Pitt	4656004	1 at-risk report, reach out about internships	3.807	2023 A&S First Year, 2023 Provost Scholar, Active UGRD - Dietrich Sch Arts and Sciences, Active UGRD - Sch Hlth & Rehabilitation Scs, Active UGRD - School of Education, Admitted Test Optional, Dorm - Lothrop Hall, Enrollment Appointment 10/30/2025, FA Academic Progress (2026) - Satisfied, First Generation College Student, Good Academic Standing - 2241, Good Academic Standing - 2244, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Education, Out of State Resident, Pittsburgh Campus, Pittsburgh Campus-Undergrad, Provost Scholar, SHE/HER, Sports Science Guarantee Yes, Undergraduate, Undergraduate Eligible to Apply for Graduation	No

Reporting





On your Staff Home page, once the students are selected, select the Actions Drop-down menu, then select Add to Student List.

Staff Home ▾

Students | Appointments | My Availability | Appointment Queues | Appointment Requests

Assigned Students

List Type: Assigned Students ▾ Term: Spring Term 2025-20... ▾ Relationship Type: All Relationship Types ▾

Actions ▾

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Note
- Issue Referral
- Add to Student List**
- Add To-Do
- Show/Hide Columns
- Export Results

ST	CUMULATIVE GPA	CATEGORY
2023 A&S First Year,2023 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sciences,Active UGRD - Sch Hlth & Rehabilitation Scs,Active UGRD - School of Education,Admitted Test Optional,Dorm - Lothrop Hall,Enrollment Appointment 10/30/2025,FA Academic Progress (2026) - Satisfied,First Generation College Student,Good Academic Standing - 2241,Good Academic Standing - 2244,Good Academic Standing - 2254,Junior,Kessler Scholars 2023,MINOR - Italian,MINOR - Secondary Education,Out of State Resident,Pittsb...	3.807	Campus,Pittsburgh Campus-Undergrad,Provost Scholar,SHE/HER,Sports Science Guarantee Yes,Undergraduate,Undergraduate Eligible to Apply for Graduation
2023 A&S First Year,2023 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sciences,CERTIFICATE - Conceptual Foundations of Medicine (Undergraduate),CERTIFICATE - Health Humanities,Dorm - Edward H. Litchfield Tower C,Enrollment Appointment 10/28/2025,FA Academic Progress (2026) - Satisfied,First Generation College Student,Good Academic Standing - 2241,Good Academic Standing - 2244,Good Academic Standing - 2254,HE/HIM,In State Resident,Kessler Scholars 2023,MINOR - Chemistry,Pittsburgh Campus,Pittsb...	3.922	Campus-Undergrad,Provost Scholar,Rural Student Pittsburgh Campus,Senior,Student Support Services,Undergraduate,Undergraduate Eligible to Apply for Graduation
2023 ENGR First Year,2023 Provost Scholar,Active UGRD - Swanson School of Engineering,Admitted Test Optional,CERTIFICATE - Supply Chain Management (Undergraduate),Enrollment Appointment 10/30/2025,FA Academic Progress (2026) - Satisfied,First Generation...		

Select Create new list and give the new student list a name. Select [Save](#).

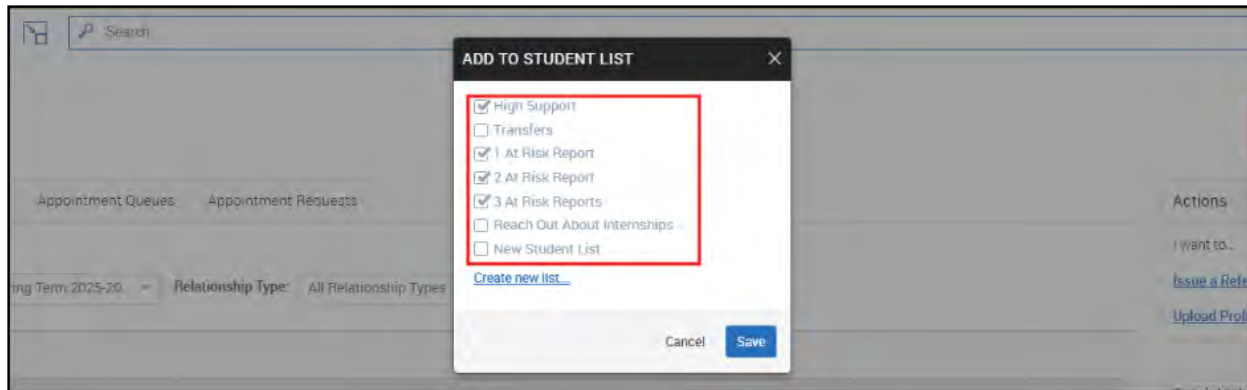
ADD TO STUDENT LIST ✕

- ☐ High Support
- ☐ Transfers
- ☐ 1 At Risk Report
- ☐ 2 At Risk Report
- ☐ 3 At Risk Reports
- ☐ Reach Out About Internships
- ☐ New Student List
- ☒

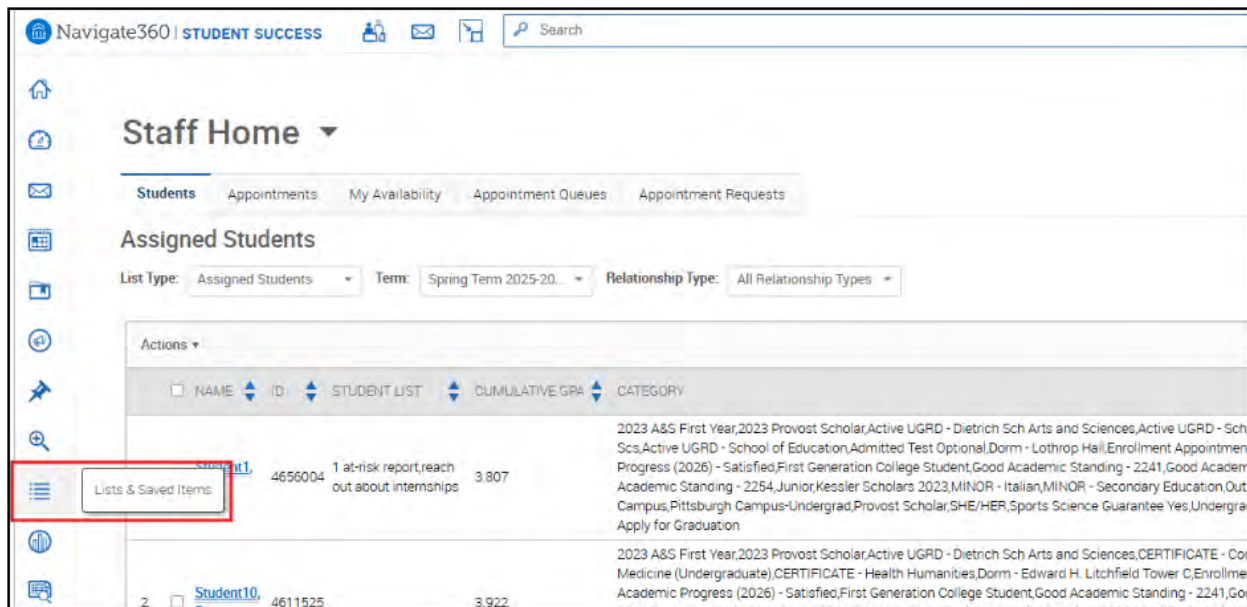
Cancel **Save**

How to Add Students to an Existing Student List

If you would instead like to add students to an *existing* list rather than creating a new one, follow the above steps, but when the “ADD TO STUDENT LIST” box appears, select the list(s) you would like to add the student to. Select [Save](#).



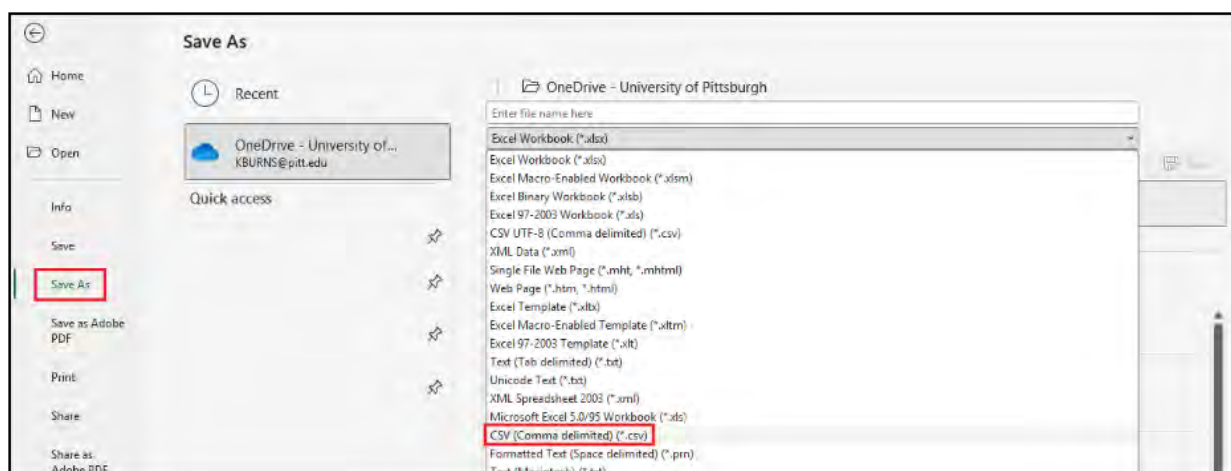
To access your student lists, select on the List & Saved Items icon from the left navigation menu of any page.



How to Upload a Student List via Batch

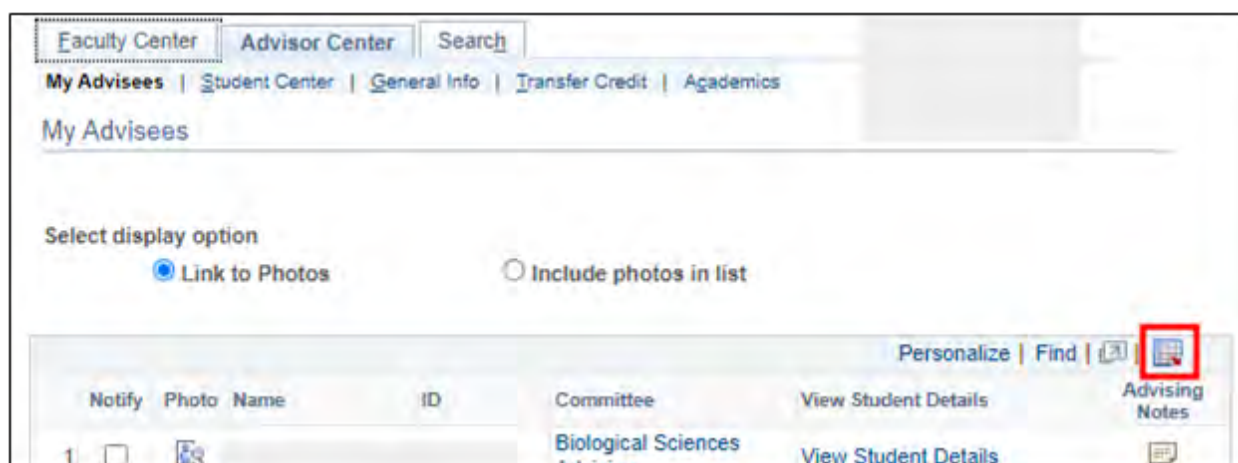
Often, you have queries from other systems that would be useful to your work within the Pathways system. Rather than recreating that list within Advanced Search or manually add students to a student list, you can load students into the system from the list you already have by uploading a .csv file.

Before you start in Pathways, you will need to create a .csv file in Excel.

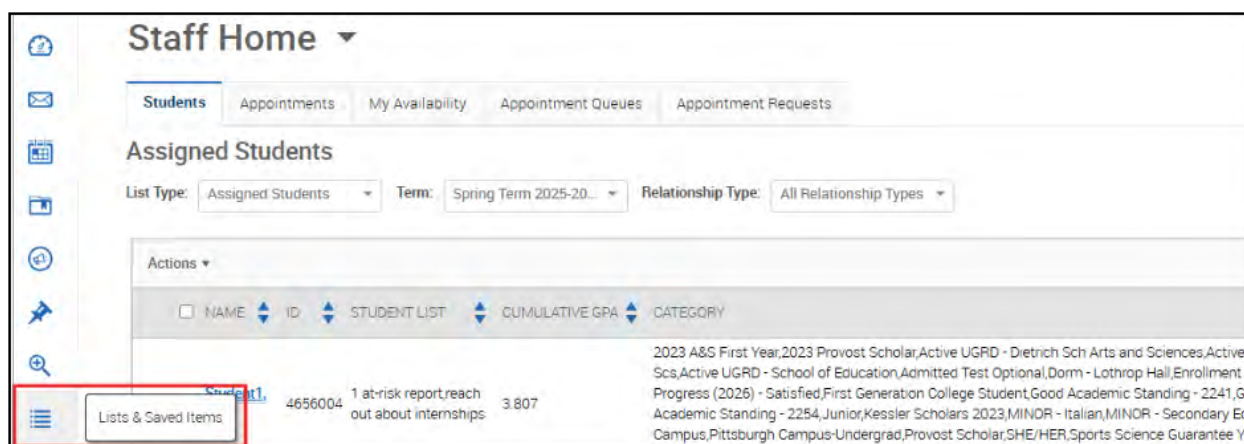


The spreadsheet should include header and a list of PeopleSoft IDs of the students that you want to include in your student list. All other columns are optional and will not be used. *Note: you can export your list of PS advisees from the Advisor Center in PeopleSoft.*

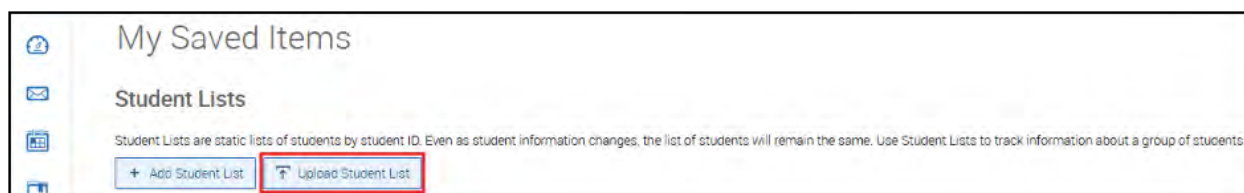
	A	B	C	D	E	F	G	H	I	J	K
1	PSID	Last Name	First Name	Admit Term							
2	1111111	Doe	Jane	2244							
3	2222222	Lane	Mary	2244							
4	1234567	Smith	John	2244							
5	3333333	Thomas	Ryan	2244							



In Pathways, select the List & Saved Items icon.



Select Upload Student List.



On the next page, you can add your students to an existing list or select New Student List then select Confirm.

Upload File to Student List

Progress bar: **Select a Student List** (active) — Upload — Choose a Column — Complete

Select A Student List

Choose a list to add these students to

Dropdown menu options: Advisees for campaign, New Student List

Confirm button

Select the Choose File button to select the file you want to load, then select the Click to upload the file button.

Upload File to Student List

Progress bar: Select a Student List — **Upload** (active) — Choose a Column — Complete

Upload

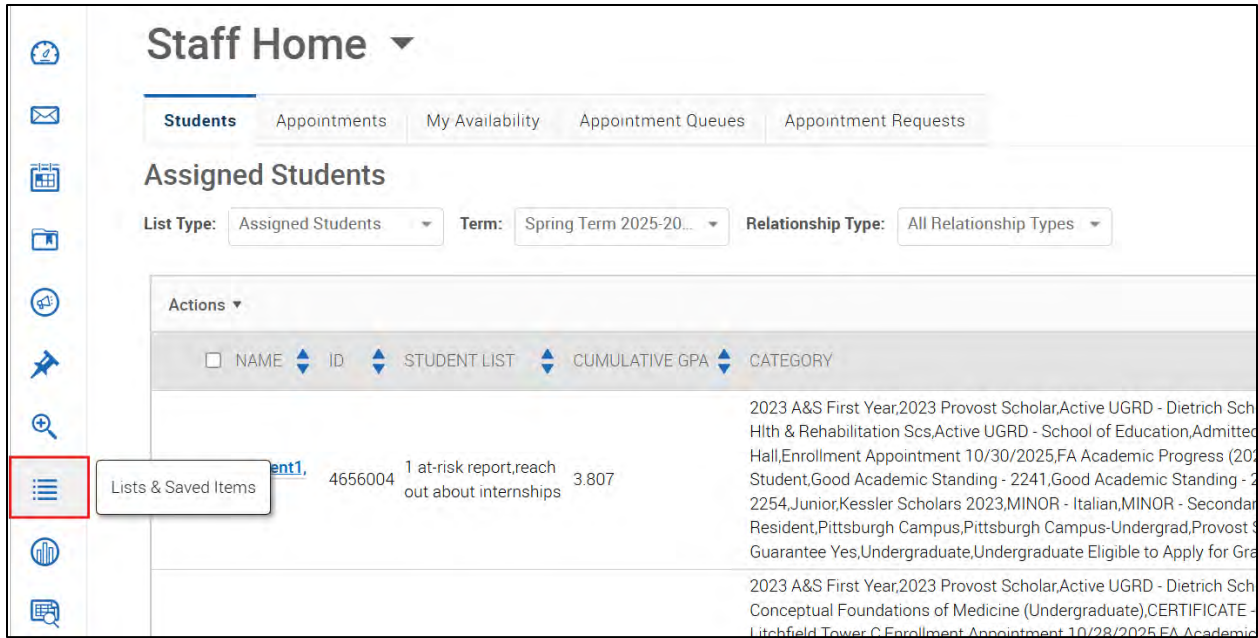
Please upload a .csv file containing a column of student IDs

Choose File button (highlighted with a red box) — xburns sample CSV.csv — Click to upload the file button (highlighted with a red box)

Select the header of the column that holds your PeopleSoft IDs and select the blue [Save](#) button.

How to Create a Saved Search

From your homepage, click on the Lists & Searches Icon



Staff Home ▾

Students | Appointments | My Availability | Appointment Queues | Appointment Requests

Assigned Students

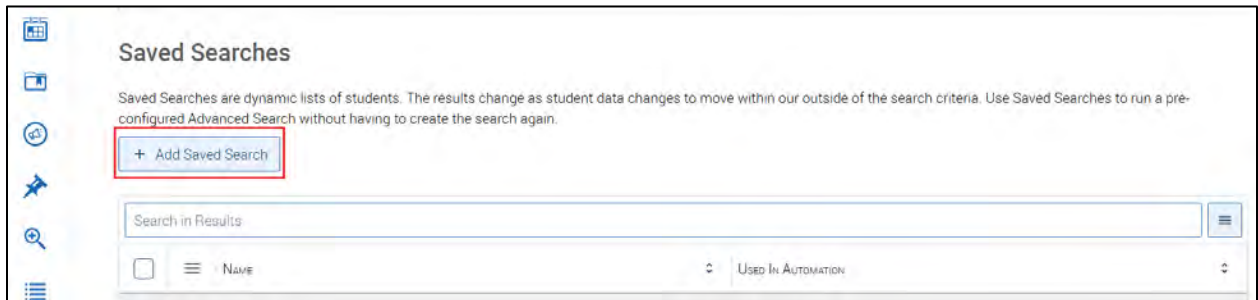
List Type: Assigned Students ▾ Term: Spring Term 2025-20... ▾ Relationship Type: All Relationship Types ▾

Actions ▾

☐	NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY
☐	ent1.	4656004	1 at-risk report, reach out about internships	3.807	2023 A&S First Year, 2023 Provost Scholar, Active UGRD - Dietrich Sch Hlth & Rehabilitation Scs, Active UGRD - School of Education, Admitted Hall, Enrollment Appointment 10/30/2025, FA Academic Progress (202 Student, Good Academic Standing - 2241, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Resident, Pittsburgh Campus, Pittsburgh Campus-Undergrad, Provost \$ Guarantee Yes, Undergraduate, Undergraduate Eligible to Apply for Gra
☐					2023 A&S First Year, 2023 Provost Scholar, Active UGRD - Dietrich Sch Conceptual Foundations of Medicine (Undergraduate), CERTIFICATE - Litchfield Tower, C Enrollment Appointment 10/28/2025, FA Academic

Lists & Saved Items

Scroll down the page to the Saved Searches section. Select [Add Saved Search](#) button.



Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

[+ Add Saved Search](#)

Search in Results

☐ ☐ ☐ NAME ☐ Used In Automation

Use the Search function and filters to select a group of students. Click [Search](#).

Search

New Search

Saved Searches -

Keywords (First Name, Last Name, Email, Student ID) ? Type ?

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Term Data Classification, Section Tag, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Section, Status

Assigned To

Success Indicators Success Markers

Nav Info Milestone filters

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

Review your list to ensure it is accurate. Once you are satisfied, select Save at the top of the page.

Search

Unsaved Student Search

Enrollment Terms: Spring Term 2025-2026 My Students Only

Actions ▾

☐ NAME ☐ STUDENT ID ☐ STUDENT LIST ☐ CUMULATIVE GPA ☐ MAJOR ☐ CLASSIFICATION ☐ CATEGORY

Name your list. Click [Save Search](#).

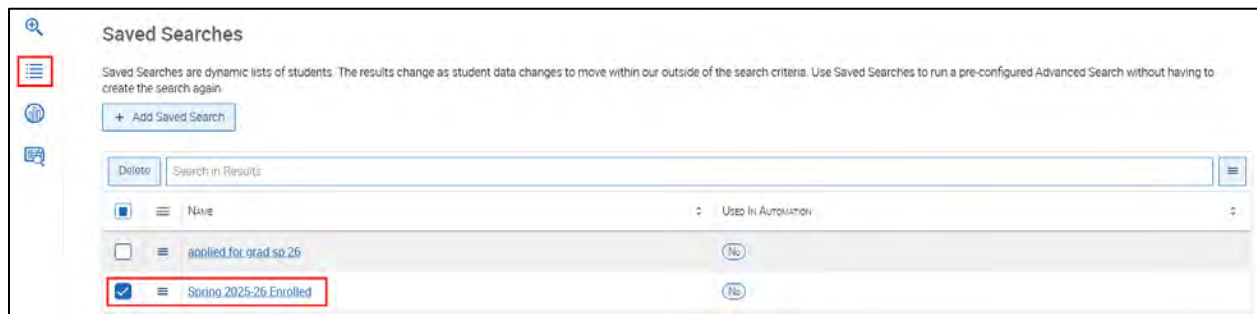
SAVE SEARCH

Name

How to Access Your Saved Search

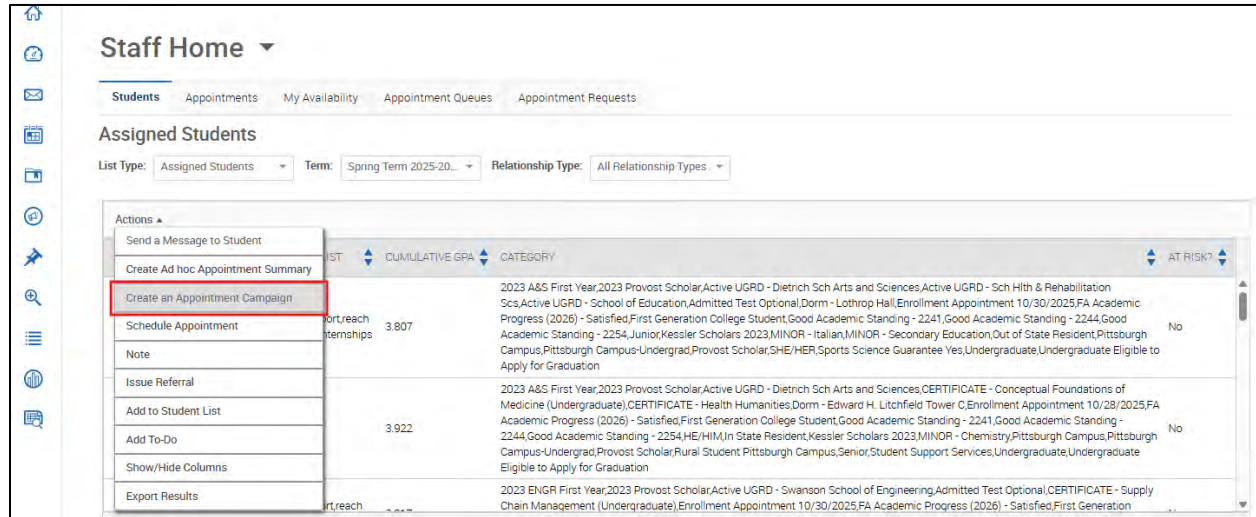
From your homepage, select the Lists & Searches Icon.

Select the saved search that you want to run again. The system will rerun the search and return the results.

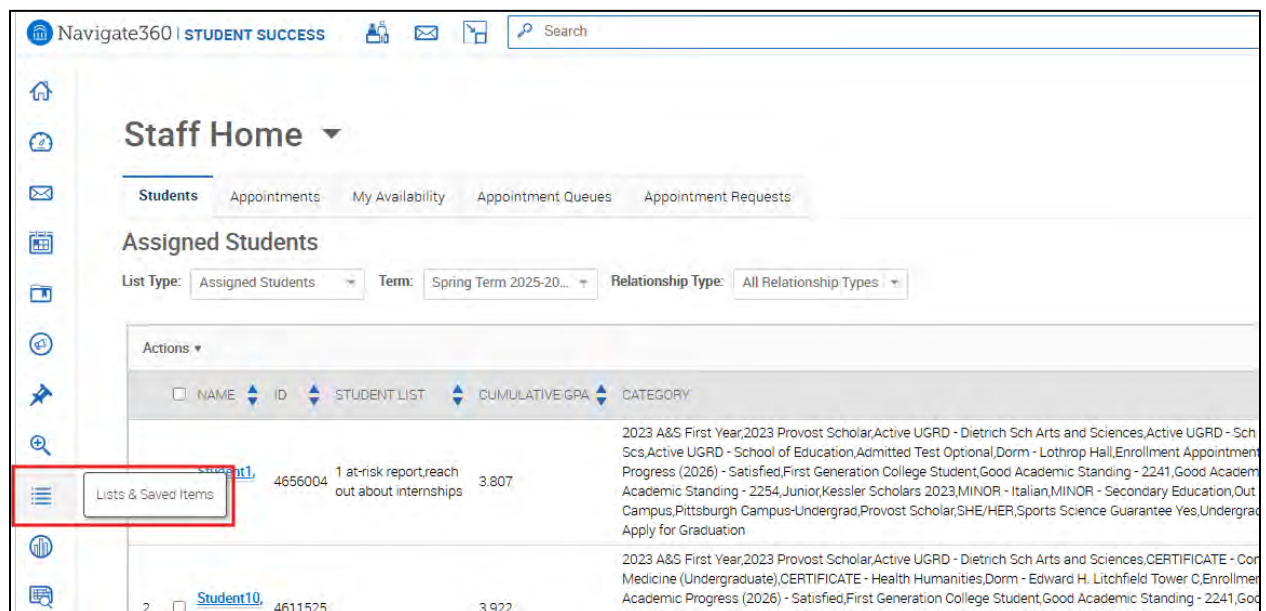


How to Create an Appointment Campaign

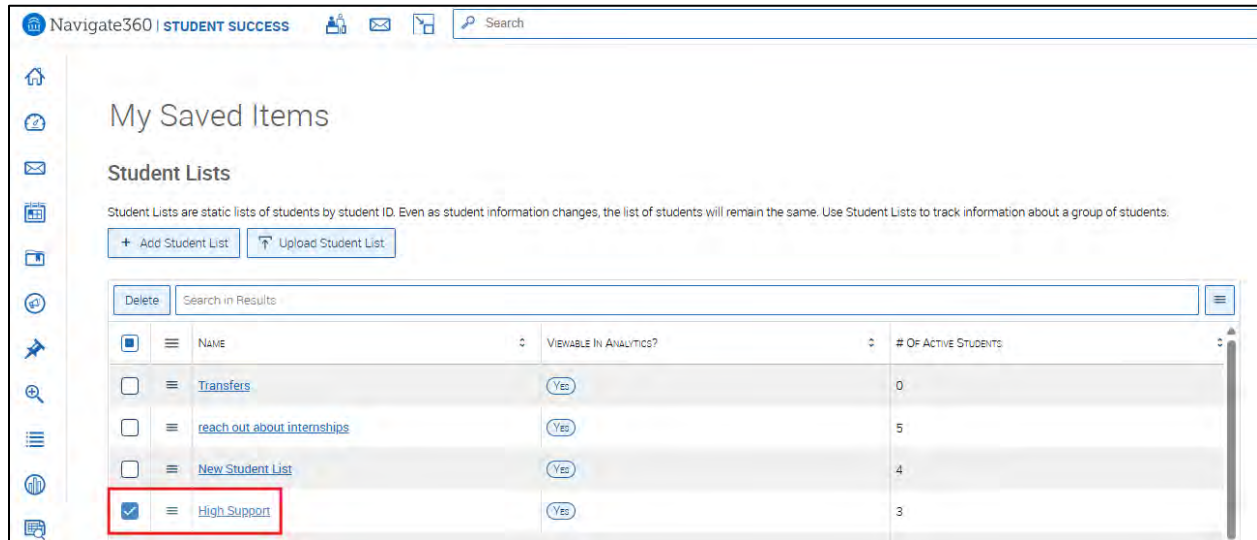
Tip: Many locations in Pathways where you can select students, including your Assigned Student list from your Staff Home page, allow you to use the Actions drop-down to quickly create an Appointment Campaign (see screenshot below).



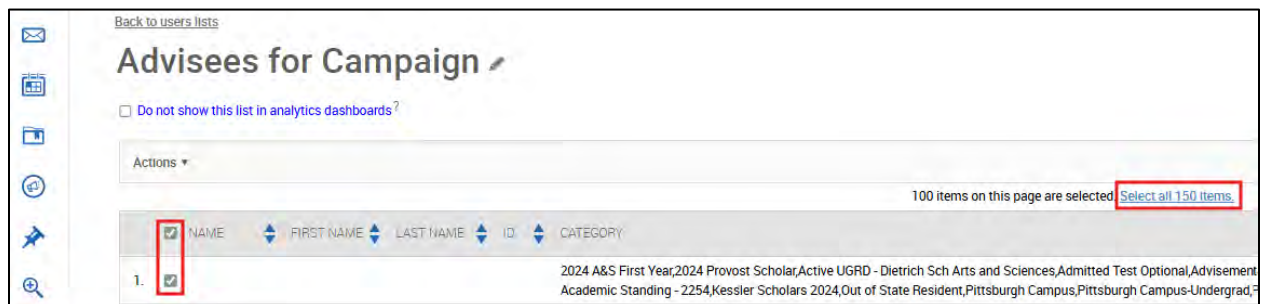
If you want to create a campaign from a saved student list, access it from the Lists and Saved Items button on the left-hand menu.



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



Once selected, use the checkboxes to check individual students, or the checkbox at the top to include all of your students. *NOTE: Selecting the checkbox at the top will only select students on the first page (or page that you are currently on). If you have more than 100 students, be sure to select the link that is displayed to "Select all items", which will appear once the checkbox at the top is selected.*



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

Back to users lists

Advisees for Campaign

☐ Do not show this list in analytics dashboards?

Actions

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Referral
- Add to Student List
- Remove from Student List
- Add To-Do
- Show/Hide Columns
- Export Results

100 items on this page are selected. [Select all 100](#)

LAST NAME	ID	CATEGORY
2024 A&S First Year,2024 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sciences,Admitted Test Optiona		Academic Standing - 2254,Kessler Scholars 2024,Out of State Resident,Pittsburgh Campus,Pittsburgh Campus
Active UGRD - Social Sciences at UPB,Admitted Test Optional,Advisement Hold Summer Term,Bradford Campu		Satisfied,First Generation College Student,Good Academic Standing - 2241,Good Academic Standing - 2244,Gd
Campus Athlete,UPB First Year Cohort 2023,Womens Basketball - UPB		
2024 A&S First Year,2024 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sciences,Dorm - Bouquet Garde		Resident,Pharmacy Guarantee Yes,Pittsburgh Campus,Pittsburgh Campus-Undergrad,Provost Scholar,SHE/HE
2024 Provost Scholar,2024 Public Health First Year,Active UGRD - Dietrich Sch Arts and Sciences,Active UGRD		Satisfied,First Generation College Student,First Year,Good Academic Standing - 2254,Out of State Resident,Pitt
Active UGRD - Social Sciences at UPB,Admitted Test Optional,Bradford Campus,Div. of Behavioral and Social S		Student,Good Academic Standing - 2254,HE/HIM,In State Resident,Rural Student Bradford Campus,Senior,Und
2024 A&S First Year,2024 Provost Scholar,Academic Alert - 2254,Active UGRD - Dietrich Sch Arts and Sciences,		10/20/2025,FA Academic Progress (2025) - Academic Plan,Junior,MIMOD - Sophomore,Out of State Resident,Dit

Previous 1 2 Next

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

New Appointment Campaign

Define Campaign — Select Recipients — Select Staff — Compose Nudges — Verify & Start

100 students will be added to this campaign.

Define your campaign by completing all required fields. A breakdown of these fields is provided below.

Campaign Configurations

Define Campaign

Set up your campaign. Specify your appointment details and timing.

Campaign Configurations

Campaign Name *

Instructions or Notes for Landing Page:

Care Unit: *

Location: *

Service: *

Campaign Name: Name your campaign using the Naming Convention. Ex. Term, dept, campaign reason, last name (full or abbreviated)

Care Unit: This should match your Availability.

Location: This should match your Availability.

Service: This should match your Availability.

Appointment Configurations

Appointment Configurations

Appointment Limit: *

Appointment Length: *

Slots Per Time: *

☐ Allow Scheduling Over Courses
 ☐ Restrict Scheduling To Assigned Staff Only ⓘ

Staff Reminders:

Recipient Reminders:

☐ Email ☐ Text

☐ Email ☐ Text

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

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

Slots Per Time: Number of students in an appointment. 1 means each appointment will be an individual appointment.

Scheduling Window



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 *
February 26, 2026

End Date *
March 12, 2026

Launch Date

This Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.

Launch Date *
February 26, 2026

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.

Launch Date: The day students will be emailed the Welcome Message, asking them to schedule an appointment. This must be the same as, or before, the Start Date.

Once all required fields are completed, select [Continue](#).

The next step will allow you to Verify Recipients. Review your list and select [Continue](#). *If necessary, you can select and remove individual students through the Actions button.*

Appointment Campaign: Mid-Term Appointments

Define Campaign
Verify Recipients
Select Staff
Compose Nudges
Verify & Start

Add Recipients To Campaign

Review Recipients in Campaign

Actions
Remove Selected Users

Next, in the Select Staff step, click the box next to your name and then select [Continue](#).

Appointment Campaign: Mid-Term Appointments

☒ Define Campaign —
 ☒ Verify Recipients —
 ☒ **Select Staff** —
 ☒ Compose Nudges —
 ☒ Verify & Start

Select Staff For Campaign

Available Staff ☒ Include Appointment Availabilities ?

ID	NAME	AVAILABLE TIMES
☒	Pitt Advisor	For: Appointments Tue, Fri 8:00am - 5:00pm ET

Note: 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. In this case, go back to edit your availability and re-define your campaign, or select the option to “Include Appointment Availabilities” to reference all the availability you have created.

Next, in the Compose Nudges step, you will compose your Welcome Message and any Nudges. Select the Add Welcome Message button.

Appointment Campaign: Mid-Term Appointments

☒ Define Campaign —
 ☒ Verify Recipients —
 ☒ Select Staff —
 ☒ **Compose Nudges** —
 ☐ Verify & Start

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

Make edits to the Welcome Message that you want to send to students. In the body of the message, make sure that the `{schedule_link}` tag stays intact—this is how a student can make an appointment with you. As you make changes you will see a preview of the email you are sending to students on the right-side of the page—this is how the students will see the email message.

Compose Message

Apply a Template

Subject +
{{ Student First Name }}, Schedule a Student Services appointment

Message +

Heading 2

Please Schedule Your Student Services Appointment.

Hello {{ Student First Name }} :

Please schedule an appointment for Academic Coaching (Virtual) at Student Success Hub. 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!

Attachments

Drag & Drop your files or [Browse](#)

Welcome Message Date: @ 02/24/2026

Nudge Dates:

- * Specific Dates: 02/24/2026
- * Relative intervals after added to campaign: N/A

Preview Email

[[Student First Name]}, Schedule a Student Services appointment

pathways

Please Schedule Your Student Services Appointment.

Hello {{ Student First Name }} :

Please schedule an appointment for Academic Coaching (Virtual) at Student Success Hub. 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](#)

You can also copy and paste this address into your web browser:
<https://pitt.campus-training.edu.com/va/123456>

Thank you!

Questions? Please email PathwaysHelp@pitt.edu

Navigate360

Once you have made your edits, select the blue [Save Welcome Message](#) button.

This will then bring you back to the Compose Nudges step. If applicable, add any additional nudges and then [Continue](#) to the Verify and Start Campaign step.

Define Campaign — Verify Recipients — Select Staff — **Compose Nudges** — Verify & Start

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Nudge

Review the Campaign Summary for your Appointment Campaign.

Define Campaign — Verify Recipients — Select Staff — Compose Nudges — **Verify & Start**

Verify & Start

Campaign Summary

Once you are satisfied, select the blue [Start Campaign](#) button on the bottom right-hand side of the page.

You can now access this campaign and see its progress and statistics using the Campaigns & Events button within the left-hand menu.

Campaigns & Events

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

Appointment Campaigns 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](#)

Tip: By adding additional Nudges, you can set up email reminders in advance for students who have not made an appointment. 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!

Compose Nudges

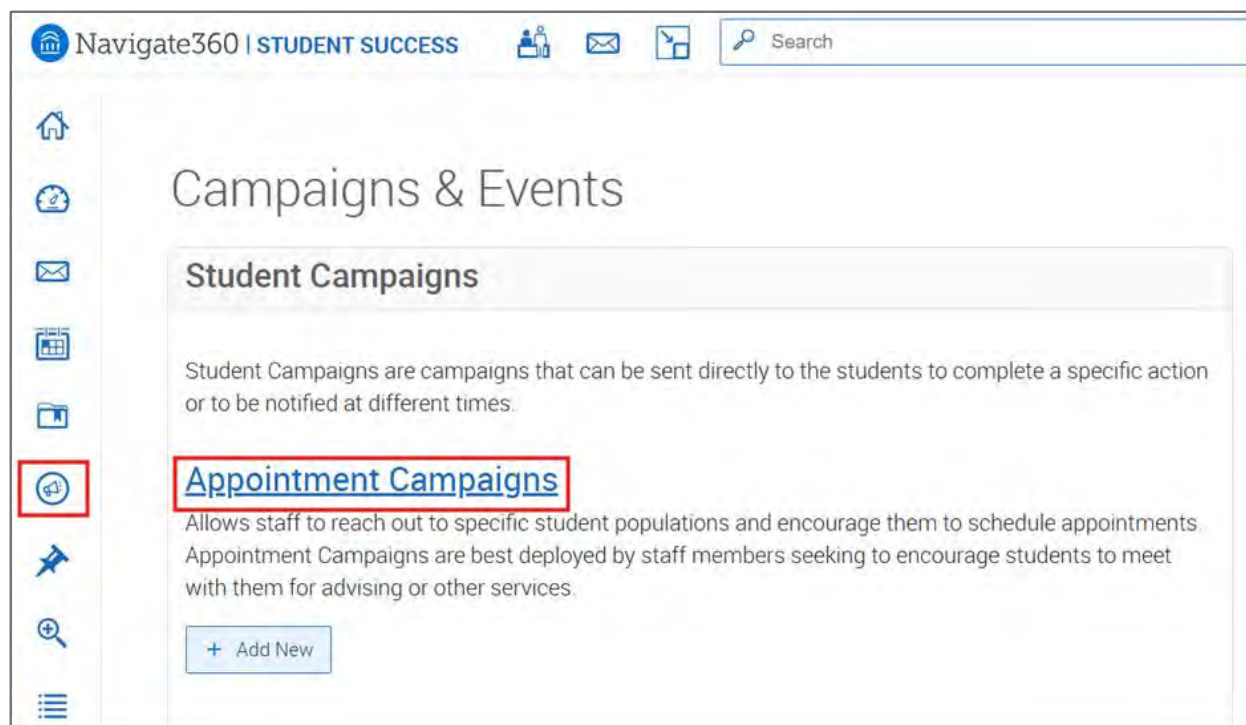
Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

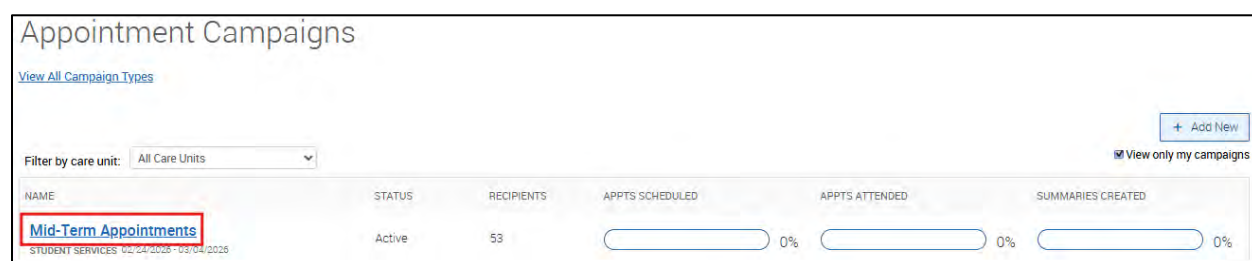
[+ Add Nudge](#)

How to Add a Student to an Existing Campaign

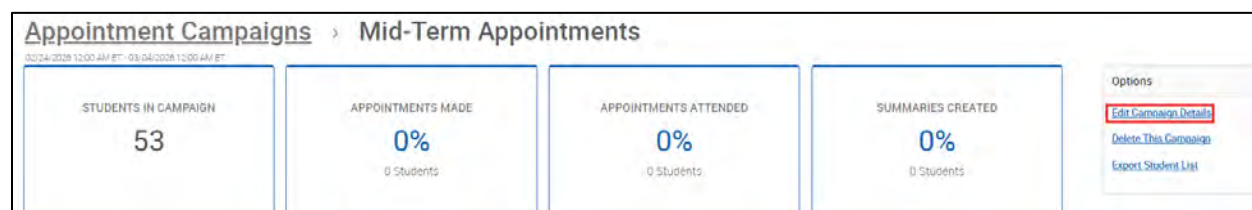
Select the Campaign & Events icon on the left navigation menu, then select Appointment Campaigns



On the next page, select the campaign you want to edit.



From the Options container on the right-side of the page, select [Edit Campaign Details](#).



On the next screen, select Verify Recipients.

Appointment Campaign: Mid-Term Appointments

☒ Define Campaign —
 ☒ **Verify Recipients** —
 ☒ Select Staff —
 ☒ Compose Nudges —
 ☒ Verify & Start

TO ADD STUDENTS

Scroll down to select Add More Recipients.

A horizontal progress bar with five steps: Define Campaign, Verify Recipients (highlighted with a red box), Select Staff, Compose Nudges, and Verify & Start. Below the bar, there are three buttons: '< Back', 'Add More Recipients' (highlighted with a red box), and 'Save and Exit'. To the right of these buttons is a blue 'Continue >' button.

This will take you to the Advanced Search tool, which you will use to find the students you want to add. *Note: You can use a Student List as a search filter or scroll down to the end of the container and filter by My Students Only.*

The 'Add Recipients To Campaign' page has a subtitle 'Add Recipients to your campaign now, later, or through automation'. The 'New Search' section includes a 'Saved Searches' dropdown, a 'Keywords' input field, and a 'Student Information' section. The 'Student Information' section has fields for First Name, Last Name, From Last Name, To Last Name, Student ID, Gender, Race or Ethnicity, and Student List (In Any of These). The 'Student List' dropdown is highlighted with a red box.

The 'Nav Info' section includes a 'Milestone filters' dropdown, a blue 'Search' button, and three checkboxes: 'Include Inactive' (unchecked), 'My Students Only' (checked and highlighted with a red box), and 'At-Risk Students Only' (unchecked).

Select the student(s) you want to add and [Search](#) to ensure you have the correct students selected. Then, press the blue [Continue](#) button.

Add Recipients To Campaign

Review Recipients in Campaign

Actions ▾

☒	NAME
-------------------------------------	------

[< Back](#)
Add More Recipients

Save and Exit
[> Continue](#)

To send these students the Welcome Message, proceed to the Verify & Start step, scroll down to the bottom of the page, and then choose to [Send Nudge Now](#).

Define Campaign
Verify Recipients
Select Staff
Compose Nudges

Verify & Start

Some newly added students in this campaign have not received a nudge yet
 You can send a nudge to them now with the Send Nudge Now button below or Save and Exit the campaign without sending these users an initial nudge. All students that are a part of this campaign will receive future nudge emails.

Recipients

View Recipients

Staff

View Staff

Welcome Message

Send Date:

Subject:

Sender Name:

No-Reply Email Address:

Reply-To Email Address:

Email Preview:

Day added

(Student_first_name), Schedule a Student Services appointment

Kaylee Burns

kburns@pitt.edu

kburns@pitt.edu

View Email

[< Back](#)

Save and Exit
[Send Nudge Now](#)

Lastly, a pop-up will appear so that you can review and/or make updates as needed before sending. Once you are satisfied, select [Send To Added Students](#).



PATHWAYS TRAINING DOCUMENTATION | For Advisors

Compose Nudge Email for Newly Added Students

▼ Apply a Template

Subject *

{Sstudent_first_name}; Schedule a Student Services appointment

Message *

Heading 2

Please Schedule Your Student Services Appointment.

Hello {Sstudent_first_name} :

Please schedule an appointment for Academic Coaching (Virtual) at Student Success Hub. 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.

{Sschedule_link}

Thank you!

Attachments

Drag & Drop your files or [Browse](#)

Cancel Send To Added Students

NOTE: If you do not manually send newly added students the Welcome Message, they will not receive any communication about the campaign. However, if you have Nudges set up, they will receive the next scheduled nudge

How to Remove a Student from a Campaign

Similarly to adding students, from the Verify Recipients page. Select the box in front of the student you want to remove. From the Actions drop-down menu, select Remove Selected Users.

Define Campaign — Verify Recipients — Select Staff — Compose Nudges — Verify & Start

Add Recipients To Campaign

Review Recipients in Campaign

Actions

Remove Selected Users

Once your list is refreshed, select [Save and Exit](#) at the bottom of the page, or [Continue](#) editing the campaign if you need to make additional edits.

< Back	Add More Recipients	Save and Exit	Continue >
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Frequently Used Terms and Definitions

EAB: The company that produced the software.

Pathways: The name EAB gave to the advisor software. Also referred to as *Navigate* at Pitt.

Navigate360: The name EAB gave to the student facing app.

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 your seniors or all your students with a GPA within a certain range).

Location: Where advising or tutoring appointments occur.

Service: Type of appointment.

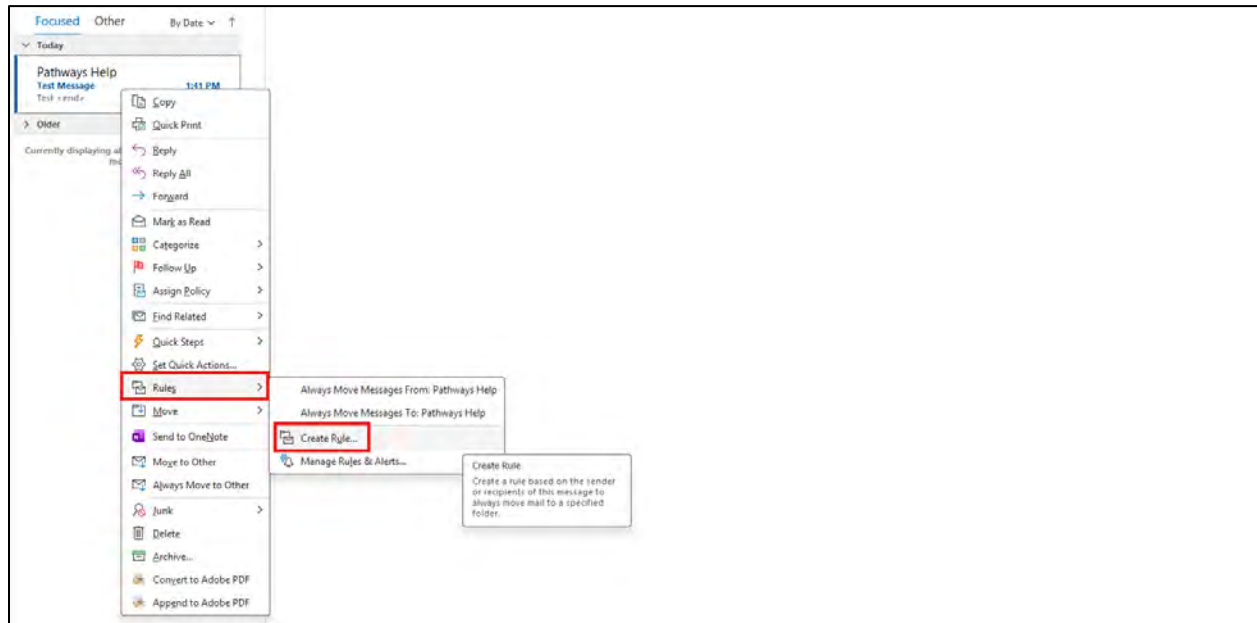
Alert: The name EAB gave to referrals.

Case: Process of how a user manages referrals in Pathways.

How to Create a Rule in Outlook for Appointment Reminder Emails

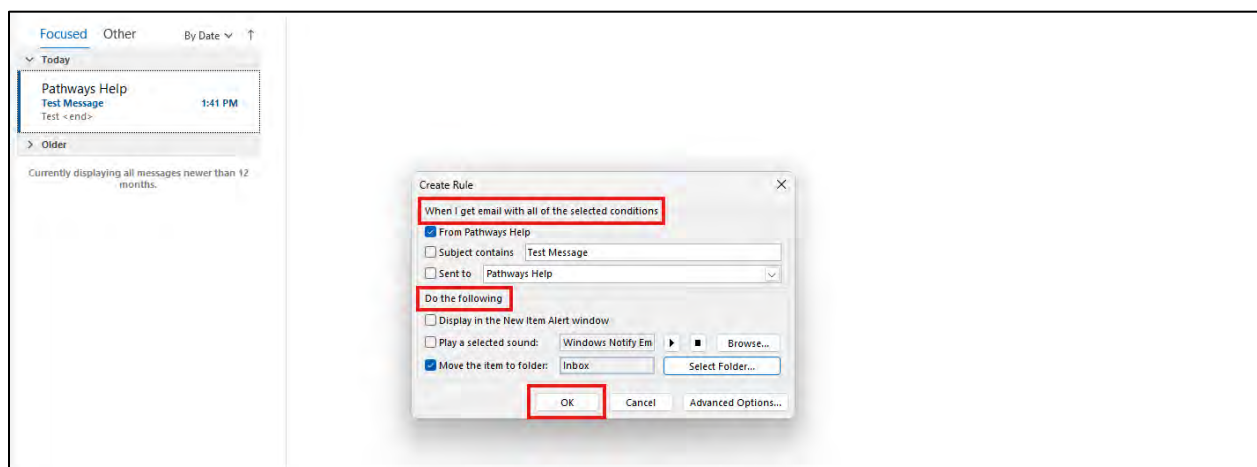
Classic Outlook

Right-click an existing message. Select Rules > Create Rule



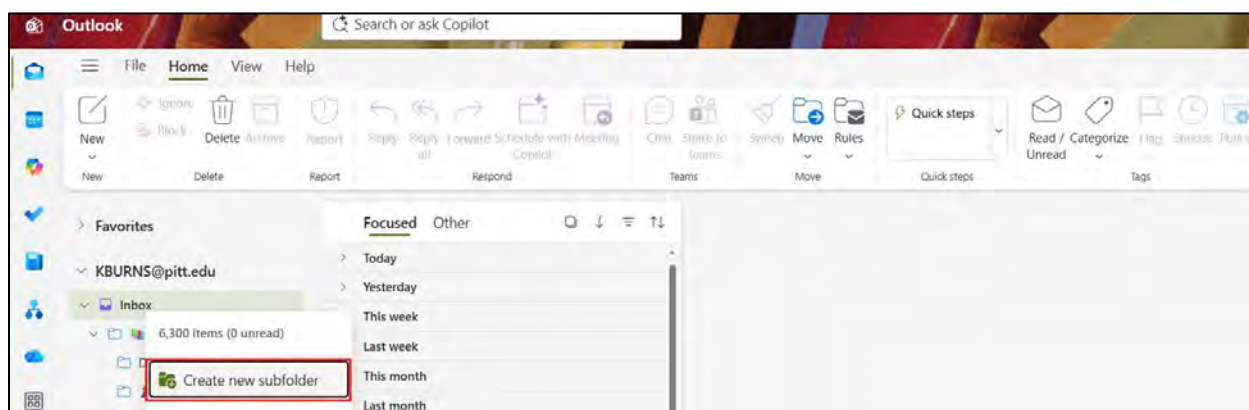
Select a condition, and what to do with the message based on the condition.

- For example (below), to move messages with a certain title to a specific folder, select that folder, then the Subject contains condition. Under Do the following, select Move the item to folder, select or create a new folder, and then select OK.

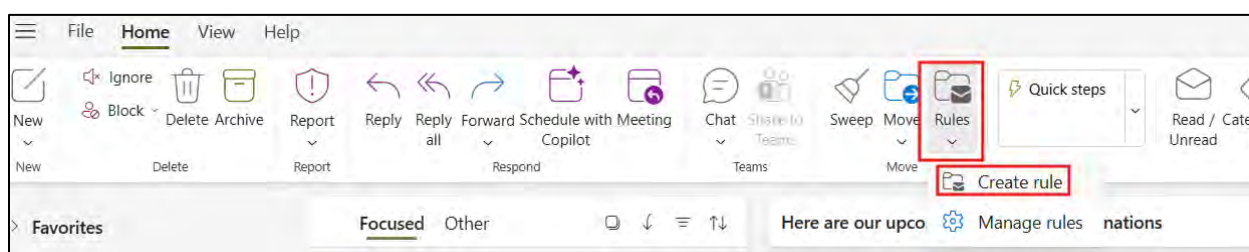


New Outlook

Right-click on your inbox in Outlook to create a new subfolder to hold your Appointment Reminders

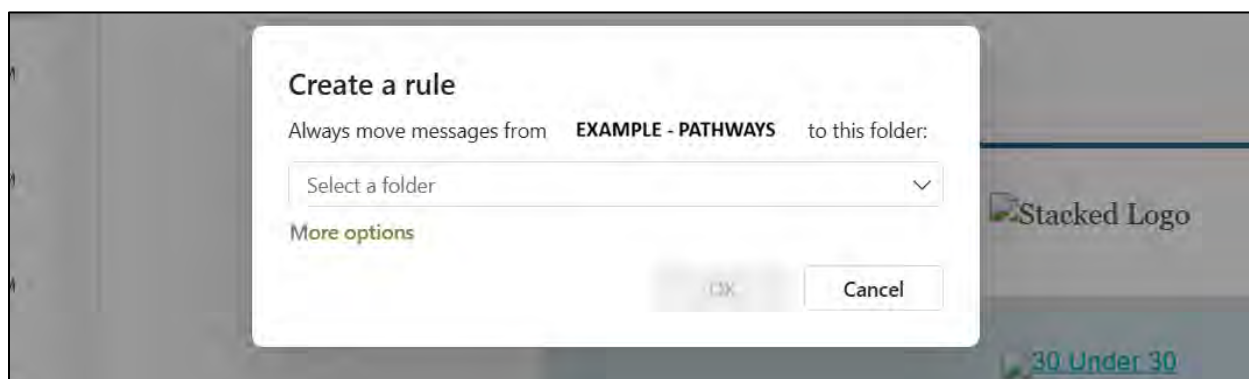


Select a message you would like to be included in the folder. Select "Rules" > "Create Rule"



You can also access Rules by right clicking the message

Select the folder you would like your message(s) to be held and select OK



You can also select More options, which will further allow you to add conditions and actions, such as moving all emails with the same subject to a specific folder. Select Save.

