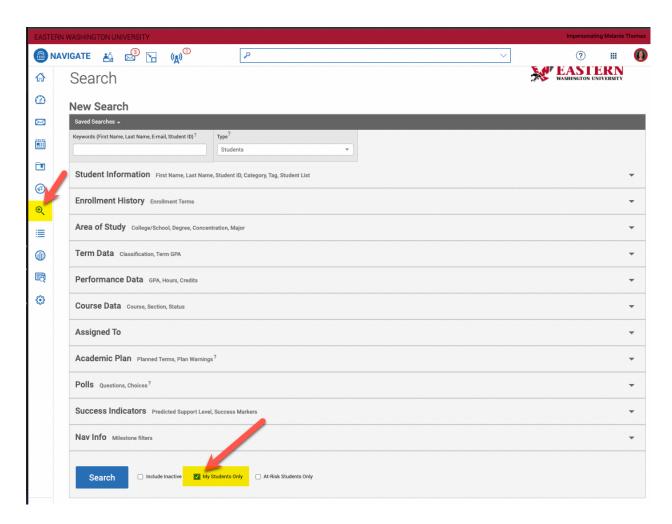
# **Training - Automated Actions in Navigate Staff**

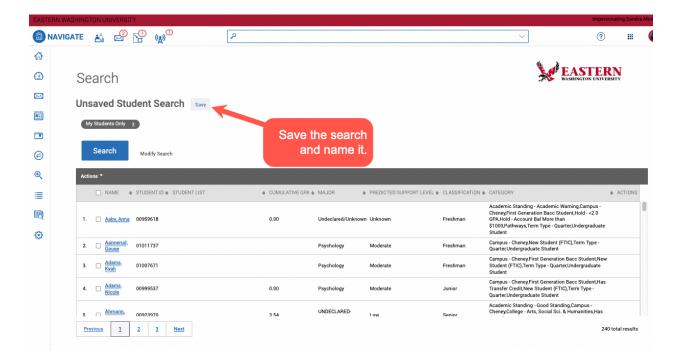
#### **Create a Saved Search**

In order to create an Automated Action of any kind, you must first create a Saved Search. While search parameters will differ based on your goal, one thing that will always be used is the check box at the bottom that states, "My Students Only". This will pull students from your personal caseload only, regardless of other parameters/variables.



For a basic "Welcome" message to students on your caseload, all that is needed is to check the "My Students Only" box - no other variables necessary.

Click the blue "Search" button at the bottom of the page.



Please use your name in each saved search. See below for example.



You can find this new Save Search in your Saved Searches area.

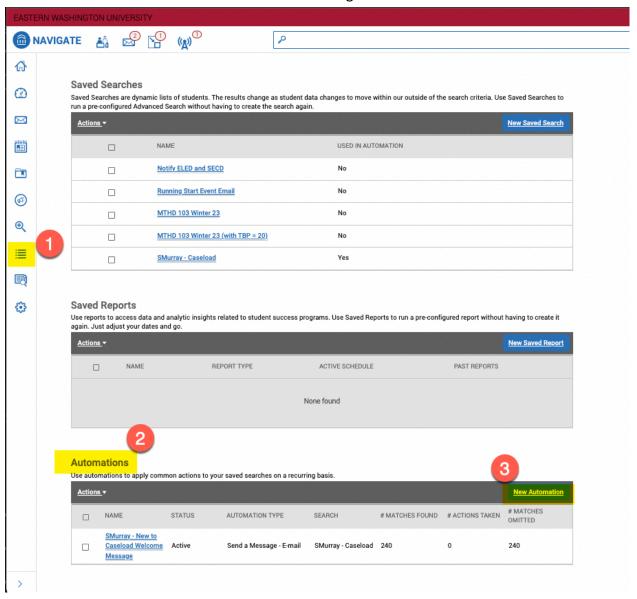
#### Saved Searches

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.

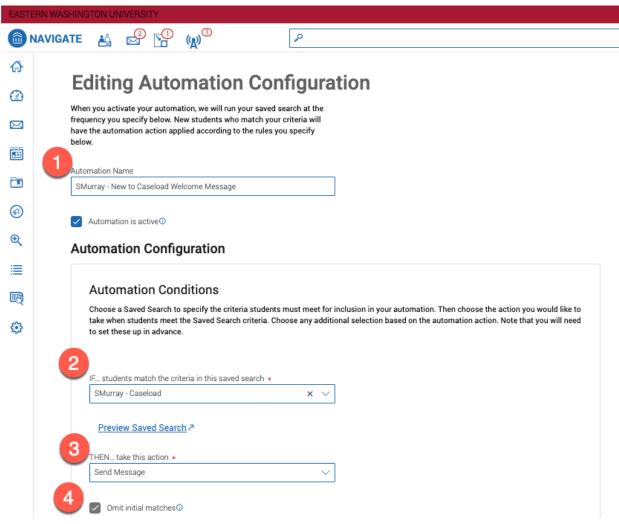


# **Setup of Auto Action for General Caseload Welcome Message**

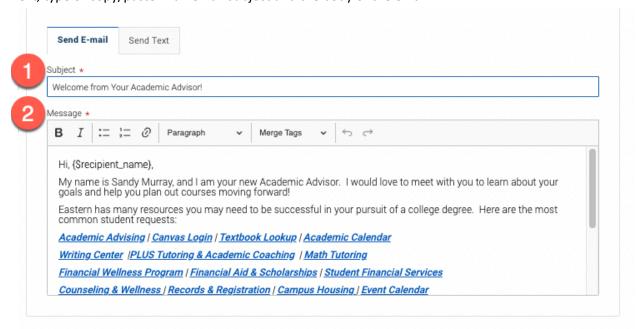
First go to the blue "Lists and Saved Items" icon on the left-hand side. Scroll down to the bottom to find "Automations". Click "New Automation" to begin a new automation.



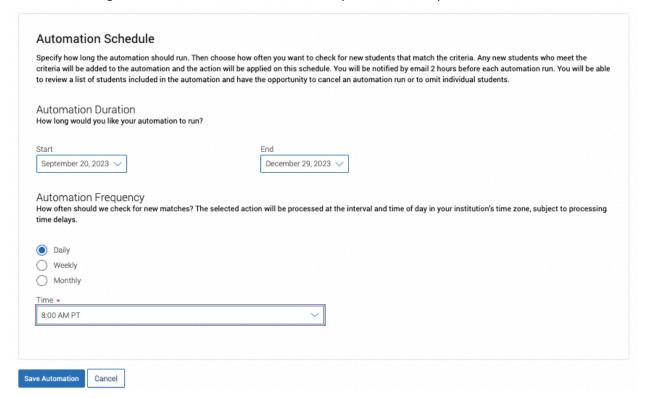
Fill out all aspects. First, name your automation. An example naming convention is "SMurray - New to Caseload Welcome Message". Second, find the Save Search you just created from the dropdown list. Third, choose "Send Message" (the only current option but additional options are coming in the near future). Fourth, make sure to check the box that states "Omit Initial Matches" as this will ensure only future students assigned to your caseload will receive your welcome message.



Next, type or copy/paste in an email subject and the body of the email.

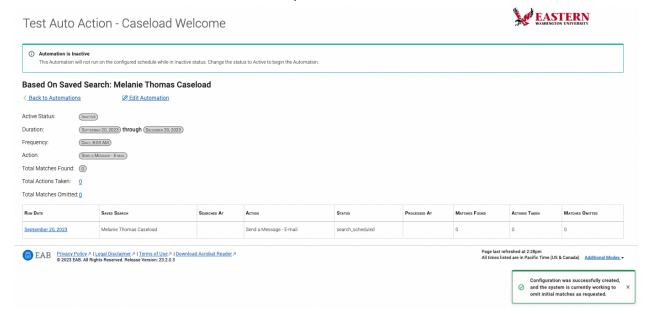


Then, set the Automation Schedule by indicating the start and end dates for this automation. Be sure to come back and extend the date if needed, or feel free to have an end date that is many years into the future. Also indicate how often you would like this automation to run (check for new matches). For a welcome message to new advisees, it is recommended you run this daily.



### **Final Confirmation Screen**

This is what the final screen will look like when you are finished!



### Lists and Saved Items in Navigate Staff

If you need to go back and review or alter your saved searches or automations, just click on the icon on the left-hand side and you will find them listed.

