

# Advanced Options

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# Adding Counselors or other non Teachers to your event

**Q:** *Our counselors don't have specific student groups assigned in Blackbaud. Can we mass-import a custom list of "counselors" (teachers), as well as class-teacher and class-student associations, into pickAtime?*

Yes, you can achieve this by using the pickAtime Importer to bypass the standard Blackbaud SKY API sync. This allows you to manually define counselor-student relationships.

## Step 1: Adjust Your Settings

To allow manual imports while using Blackbaud, you must first disable the automated sync:

- Navigate to Global Setup / Business.
- In the Single Sign On section, uncheck the box labeled "Use SKY API, Importer."

## Step 2: Prepare Your Data Files

You will need to create and import three Tab-delimited text file (\*.txt or \*.tsv):

File Type	Requirement	Key Instruction
<a href="#">Teacher file</a>	List of Counselors	Use their BlackbaudID as the TeacherID.
<a href="#">Class file</a>	"Counselor Classes"	Create a unique ClassID (e.g., smith_counselor) and ClassName (e.g. Counselor John Smith) for each counselor.
<a href="#">Enrollment file</a>	Student Rosters	Use the ClassID from Step 2 and the StudentID from Blackbaud to link them.

## Step 3: Run the Import

1. Go to the Importer page.
2. Set Data Type to "School".
3. Select your specific event from the Event dropdown.
4. Upload the files one by one in this order: Teacher → Class → Enrollment.
5. Click Select File and Import for each.

## Step 4: Verification

Once the imports are complete, open your event in the Admin UI and navigate to the Class Editor. Here, you can verify that the counselors are correctly linked to their assigned students.

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Note: Because you are unchecking the "Use SKY API Importer" box, ensure that any other automated data syncs you rely on won't be negatively impacted during this manual process. Once you complete the import of the data files, you can activate the 'Use SKY API Importer' again.

# Admissions Importing and Events

To import the role of Parent of Candidate and Parent of Incoming Student, select the import option of the Admission event. No event is selected for this type of import, as this import type brings in parents' contact records to the entire school vendor account in pickAtime. Once you do the initial import, this will sync daily.

**NOTE:** The Admission import will include contact records with roles: Parent of Candidate; Parent of Incoming Student.

# Other Event Scheduling

pickAtime online scheduling system is primarily utilized by Blackbaud for parent-teacher conferences, but it's versatile enough to cater to a variety of events.

Whether it's school tours, admissions interviews, counseling appointments, summer school registration, career fairs, teacher training, volunteer sign-ups, college representative visits, iPad/laptop checkout appointments, shadow student visit days, uniform fittings, senior photos, or parent surveys, pickAtime offers two convenient event types: [Normal](#) and [Roster](#).

This ensures easy scheduling for all your diverse event needs.

FYI, on each of the mentioned event types, we provide a special option for Blackbaud schools - Just for Admins Event.

This option is available on the Event Management, Settings / UI Setup tab at the very bottom.

There is a checkbox Display CUI as the default page for Admins after the login process

**NOTE:** If this option is activated, the event will not be available for the regular users (parents). It would be available for Admins only.

# SSO - Directing Parents to a Predetermined Event

You can direct parents to a specific event based on their student's grade. For example, a parent of a student in grade 9 would only see the grade 9 event, a parent of a student in grade 10 would only see the grade 10 event, and so on.

Each parent contact will be associated with a unique EventID. This connection is made by importing a parent file with a column labeled EventID. Each row should be filled with the unique event identifier for the event that the parent should have access to. When that parent logs in, they would ONLY see the event they had access to.

First, create the parent file.

This file lists all the parents. The parent file must contain the following fields:

- **ParentID** identifies the parent
- **First** contains the first name of the parent
- **Last** contains the last name of the parent
- The **email** contains the parent's email address. Only one email address should be entered here.
- **EventID** (special column) - contains event ID. The EventID is the unique identifier for the event that the parent should have access to. These unique ID #'s can be located on the Reports page. Select the Account Reports option and then select the report labeled Settings.

In your parent file, fill the EventID column with the EventID # corresponding to the event the parent should have access to. For example, if you have the following events: Grade 9 Counseling Appointments and Grade 10 Counseling Appointments, you would use the unique EventID for each event and associate this EventID with the parent.

To include multiple EventIDs, simply separate the IDs by a semi-colon and include no spaces (e.g., 28972x;28973x). If you include multiple EventIDs, parents will then see a drop-down and can toggle between any of the events they have access to.

ParentID	First	Last	Email	EventID
29786	Sally	Jones	sally.jones@noemail.com	28972X
27856	Bob	Williamson	bob.williamson@noemail.com	28973X

Import this file using the pickAtime Importer:

1. Turn off the Blackbaud import option on your account:

- Go to the [Global Setup / Business](#), Show Advanced Options, Single Sign On Options, Blackbaud section
- Remove the School System Login/ID

After importing your data via the pickAtime Importer, you would have to restore your School System Login/ID

2. On the left-hand side dashboard, select the Importer option. Here, you would be able to see pickAtime Importer (Data Importer):

- Data type - set the radio button to 'School'
- Event - select your 'event name' from the drop-down
- File type - select 'parents (optional)'
- File - select the parent file on your computer and click 'Open.'
- Then click the 'Import' button

When a parent logs in, they will be directed to the correct event.

## Category Options

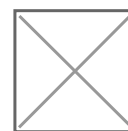
If you are intending to use the **Category Sort** option for your Prospective and Current parents, pickAtime has added an option on **Global Setup /Contacts/Advanced Options/Setup Parents Category**. This option offers a multi-select dropdown menu for event categories, offering you the ability to easily give each section its own CategoryID.

If you need any assistance with these options, please email [support@pickatime.com](mailto:support@pickatime.com)

# Types of Parents within your pickatime account

You will notice that parents who are current vs prospective are marked differently within contacts.

**Current Parent** (this parent would generally be accessing *Parent-Teacher Conferences*)



**Prospective Parent** (this parent would generally be accessing *interview-like events*)

Import Parent Type: Prospective in pickAtime includes Blackbaud's roles Parent of Candidate; Parent of Incoming Student.

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## Helping your Prospective Parents access their events.

The roles of Parent of Candidate and Parent of Incoming Student don't have [access to the resource boards](#). Therefore, you will need to assist them by utilizing Blackbaud's Smart Tuition SSO. This text could be added to the [Admissions Progress Text Box](#) or as a Checklist Step.

## Accessing the Admission Setup

To add Blackbaud's Smart Tuition SSO, you need to be able to view the Admission Setup. To see Admissions setup, you need to have the "Admissions Manager" role (Note: after applying the new role to the account, you must log out and log in again).

## Creating the Smart Tutorial SSO for the Admissions Text Box

1. While in Enrollment Management, go to the Admissions drop-down menu and select Admissions Setup.
2. Under Admissions Setup, select 'Candidate Progress Text and type out the message that you want to present to the Parents of Candidates; Parents of Incoming Students. Select the line of text that you want to hyperlink and select the hyperlink button.
3. The URL that you want to add is the URL that is located in Core => Security => Authenticate Settings => SSO Settings ([review steps 3-6 of SSO Setup](#))
4. If you want to customize your link with color please note that there is no built-in feature to change text color, so you need to open the Source Code viewer (by clicking the "<>" button in the left upper corner) and place style=" color: red;" in <a href="Real SSO link" ...>Text visible to Parents of Candidate</a>
5. You have now set up your message and URL information. Now you can test it.

## Testing your Smart Tuition SSO

Return to Core and under your account name, select the Impersonate User option. Be sure to select a user who only has the role of Parent of Candidate or Parent of Incoming Student.



You will see on the right-hand side of the page the new information and URL.

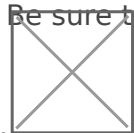
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## Adding the pickAtime link as a Checklist Step

1. While in Enrollment Management, go to the Admissions drop-down menu and select Admissions Setup.
2. Then Select 'Checklists.'
3. Select the Checklist that you wish to add the step to by clicking edit.
4. Locate which stage of the checklist you want to add your step to and click 'Add Step.'
5. Fill out the form. Be sure to fill out the type, name, due date, staff assigned, whether it's required, and click 'yes' on Candidate Publishing Options.
6. Add the Step Name, Description, and then add the URL that is located in Core => Security => Authenticate Settings => SSO Settings ([review steps 3-6 of SSO Setup](#)). Optionally, you can add an image.
7. Click 'Show Details' and then click 'Save'.
8. This action may affect your candidates. If it does, you can choose to update/ change which candidates need to have access.
9. Once you confirm which candidates have access, you will see the step in the checklist.

## Testing the Checklist Step via Impersonation

Return to Core and under your account name select the Impersonate User option. Be sure to select a user who only has the role of Parent of Candidate or Parent of Incoming Student.



You will now see the step in the student's checklist.