

Creating, Managing and Using Student Lists

Student lists are static lists in the platform that can be used to organize or track students based on a certain attribute. Once a list is created, it can be used across the platform and in coordination with other Pathways features.

These lists must be manually updated, as they will not update with other PeopleSoft related data, such as advisor assignments or enrollment. If a student no longer fits the criteria for the list you created, you will need to remove them.

Student lists are only visible to the user who created them and cannot be shared with other Pathways users.

Contents

Accessing and Using Student Lists	2
How to Create a New Student List	4
Managing Student Lists (Removing and Adding Students, Deleting and Renaming Student Lists)	8
REMOVING OR ADDING STUDENTS.....	8
RENAMING OR DELETING A STUDENT LIST	10
How to Upload a Student List	10

Accessing and Using Student Lists

Student lists appear and can be accessed several places across the platform. They can be used for Advising Campaigns, sending communications, and as a self-created filter for searches and reports.

The Assigned Students page includes a List Type drop-down menu where you can access each student list.

Student lists can be added as a column on your Assigned Students Staff Home Tab.

The screenshot shows the 'Staff Home' interface with the 'Assigned Students' tab selected. A red box highlights the 'List Type' dropdown menu, which is set to 'Assigned Students'. Another red box highlights the 'STUDENT LIST' column header in the table below. The table has columns for NAME, ID, STUDENT LIST, CUMULATIVE GPA, CATEGORY, and AT RISK?. The first row shows a student with ID 4656004 and a cumulative GPA of 3.807. The 'STUDENT LIST' column contains the text '1 at-risk report, reach out about internships'.

Student lists can be used as a filter when running Reports.

The screenshot shows the 'Data Filters' interface. A red box highlights the 'Data Filters' icon in the left sidebar. The main area shows a filter configuration for 'Student List'. The filter is set to 'contains any' and the value is 'ADVISED FOR CAMPAIGN'. The 'Filters Logic' is set to 'Match all Filters (AND)' and 'Results must match ALL filters: 1 AND 2'. There are checkboxes for 'Include Inactive Users', 'Include My Students Only' (checked), 'Progress Reports Marked At-Risk Only', and 'Include Dropped Courses'.

Student lists can also be used as a filter in Advanced Searches.

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

First Name ? Last Name ? From Last Name ? To Last Name ? Student ID ?

Gender: All Race or Ethnicity: All

E-mail(s) Category (In Any of these) ?

Tag (In Any of these) ?

Student List (In Any of These)

Advisees for Campaign

You can also access student lists from the List & Saved Items icon from the left navigation menu of any page. This is where student lists need to be managed.

Navigate360 | STUDENT SUCCESS

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
Student10	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 Scs, Active UGRD - School of Education, Admitted Test Optional, Dorm - Lothrop Hall, Enrollment Appointment Progress (2026) - Satisfied, First Generation College Student, Good Academic Standing - 2241, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Education, Out Campus, Pittsburgh Campus-Undergrad, Provost Scholar, SHE/HER, Sports Science Guarantee Yes, Undergrad Apply for Graduation
Student10	4611525		3.922	2023 A&S First Year, 2023 Provost Scholar, Active UGRD - Dietrich Sch Arts and Sciences, CERTIFICATE - Cor Medicine (Undergraduate), CERTIFICATE - Health Humanities, Dorm - Edward H. Litchfield Tower C, Enrollment Progress (2026) - Satisfied, First Generation College Student, Good Academic Standing - 2241, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Education, Out Campus, Pittsburgh Campus-Undergrad, Provost Scholar, SHE/HER, Sports Science Guarantee Yes, Undergrad Apply for Graduation

Lists & Saved Items

From here, you can also perform several actions using the drop-down Actions menu.

[Back to users lists](#)

High Support

☐ 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
- Note
- Issue Referral
- Add to Student List
- Remove from Student List
- Add To-Do
- Show/Hide Columns
- Export Results

LAST NAME	ID	CATEGORY
Student11	4633884	2023 ENGR First Year,2023 Provost Scholar,Active UGRD - Swanson School of Engineering,Admitted Test Optional,CERTIFICATE - Supply Generation College Student,Good Academic Standing - 2244,Good Academic Standing - 2254,HE/HIM,In State Resident,Junior,Kessler S
Student17	4648078	2023 A&S First Year,2023 Provost Scholar,Academic Alert - 2241,Academic Alert - 2254,Active UGRD - College of General Studies,Active U Academic Progress (2026) - Satisfied,First Generation College Student,HE/HIM,In State Resident,Kessler Scholars 2023,New on Probatio
Student2	4631891	2023 CBA First Year,2023 Provost Scholar,Active UGRD - College of General Studies,Active UGRD - Dietrich Sch Arts and Sciences,Admitt Student,Good Academic Standing - 2241,Good Academic Standing - 2254,Kessler Scholars 2023,Out of State Resident,Pittsburgh Camp

How to Create a New Student List

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

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	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,SH/HER,Sports Science Guarantee Yes,Undergraduate,Undergraduate Eligible to Apply for Graduation	No

Advanced Search

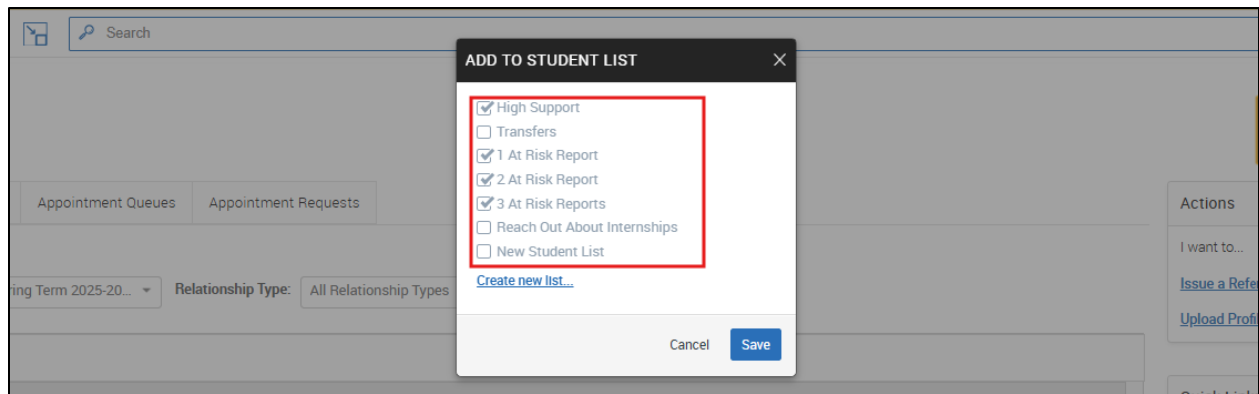
On your Staff Home page, once the students are selected, select the Actions Drop-down menu, then select Add to Student List.

The screenshot shows the 'Staff Home' page with a navigation bar containing 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. The 'Assigned Students' section is active, displaying a table with columns for 'STUDENT ID', 'CUMULATIVE GPA', and 'CATEGORY'. The 'Actions' dropdown menu is open, showing options like 'Send a Message to Student', 'Create Ad hoc Appointment Summary', 'Create an Appointment Campaign', 'Schedule Appointment', 'Note', 'Issue Referral', 'Add to Student List' (highlighted), 'Add To-Do', 'Show/Hide Columns', and 'Export Results'.

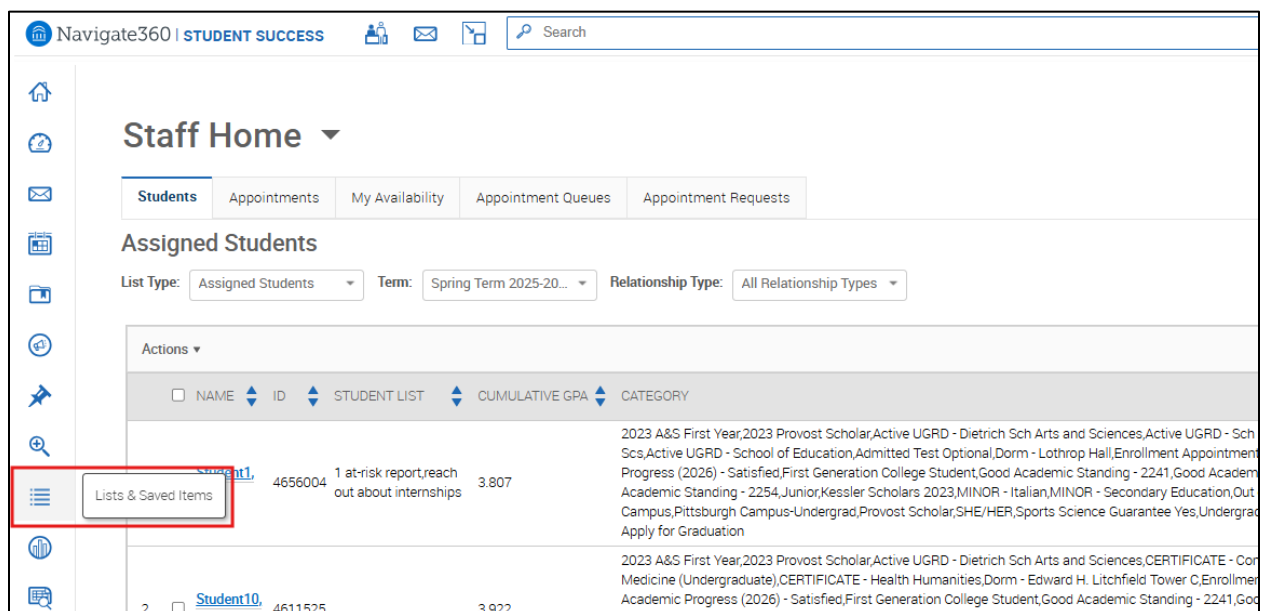
Select Create new list and give the new student list a name. Select [Save](#).

The screenshot shows the 'ADD TO STUDENT LIST' dialog box. It contains a list of checkboxes for various student categories: 'High Support', 'Transfers', '1 At Risk Report', '2 At Risk Report', '3 At Risk Reports', 'Reach Out About Internships', and 'New Student List'. The 'New Student List' checkbox is checked, and the 'Create new list...' link is highlighted. The 'Save' button is also highlighted.

If you would instead like to add students to an existing list rather than creating a new one, 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.



Managing Student Lists

(Removing and Adding Students, Deleting and Renaming Student Lists)

Student lists do not update like your assigned students might, based on PeopleSoft relationships. To maintain accurate student lists, you will need to update them manually.

Select the List & Saved Items icon from the left navigation menu to access your student list

Staff Home

Assigned Students

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

NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY
Student1	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 Scs,Active UGRD - School of Education,Admitted Test Optional,Dorm - Lothrop Hall,Enrollment Appointment Progress (2026) - Satisfied,First Generation College Student,Good Academic Standing - 2241,Good Academic Standing - 2254,Junior,Kessler Scholars 2023,MINOR - Italian,MINOR - Secondary Education,Out Campus,Pittsburgh Campus-Undergrad,Provost Scholar,SHE/HER,Sports Science Guarantee Yes,Undergrad Apply for Graduation
Student10	4611525		3.922	2023 A&S First Year,2023 Provost Scholar,Active UGRD - Dietrich Sch Arts and Sciences,CERTIFICATE - Cor Medicine (Undergraduate),CERTIFICATE - Health Humanities,Dorm - Edward H. Litchfield Tower C,Enrollment Academic Progress (2026) - Satisfied,First Generation College Student,Good Academic Standing - 2241,Good Academic Standing - 2254,Junior,Kessler Scholars 2023,MINOR - Italian,MINOR - Secondary Education,Out Campus,Pittsburgh Campus-Undergrad,Provost Scholar,SHE/HER,Sports Science Guarantee Yes,Undergrad Apply for Graduation

REMOVING OR ADDING STUDENTS

Under Student Lists, select the hyperlink of the list you would like to update and then select the student(s).

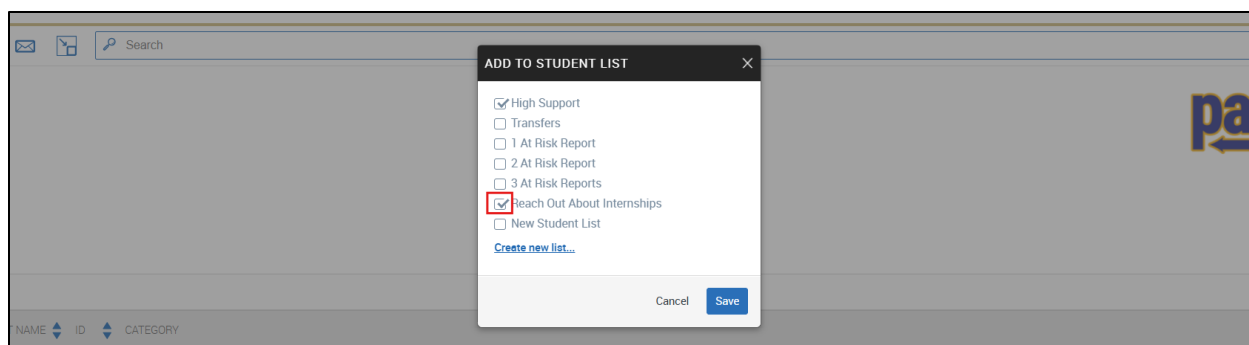
Student Lists

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

+ Add Student List Upload Student List

Search in Results

NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
Transfers	Yes	0
reach out about internships	Yes	5
New Student List	Yes	4
High Support	Yes	3
At-Risk Report	Yes	1



Note: All lists that already have a checkbox means that the student is already a member of that list. If you un-check a box in this step, the student(s) will be removed from the list and be added/remains on all other lists that are checked.

RENAMING OR DELETING A STUDENT LIST

Use the hamburger menu to Rename or Delete an entire list.

Student Lists

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

+ Add Student List
Upload Student List

Delete
Search in Results

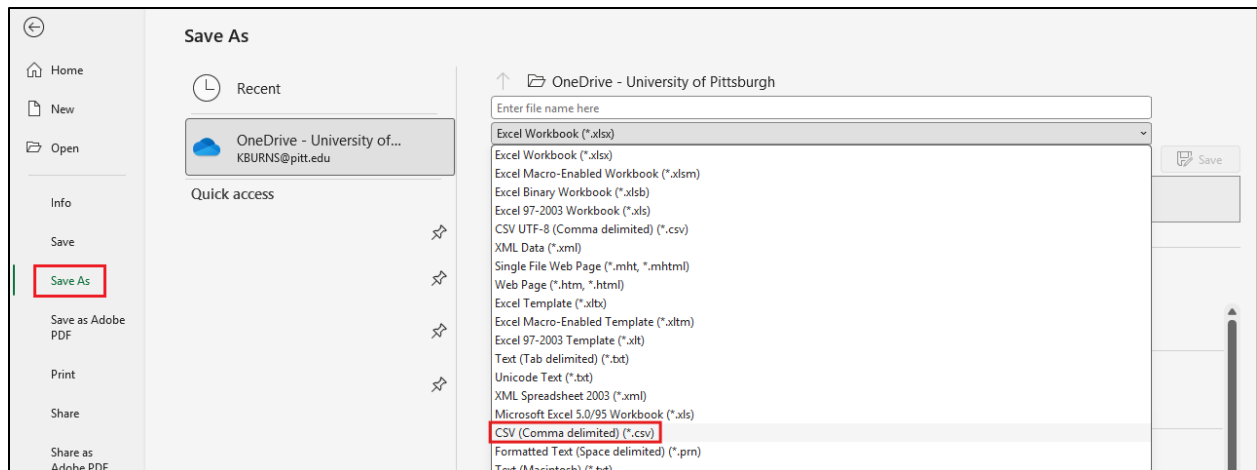
		NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
☒			Yes	0
☐			Yes	5

Renaming an entire student list can be useful for tracking things like classification (to move a whole first-year cohort into their second-year)

How to Upload a Student List

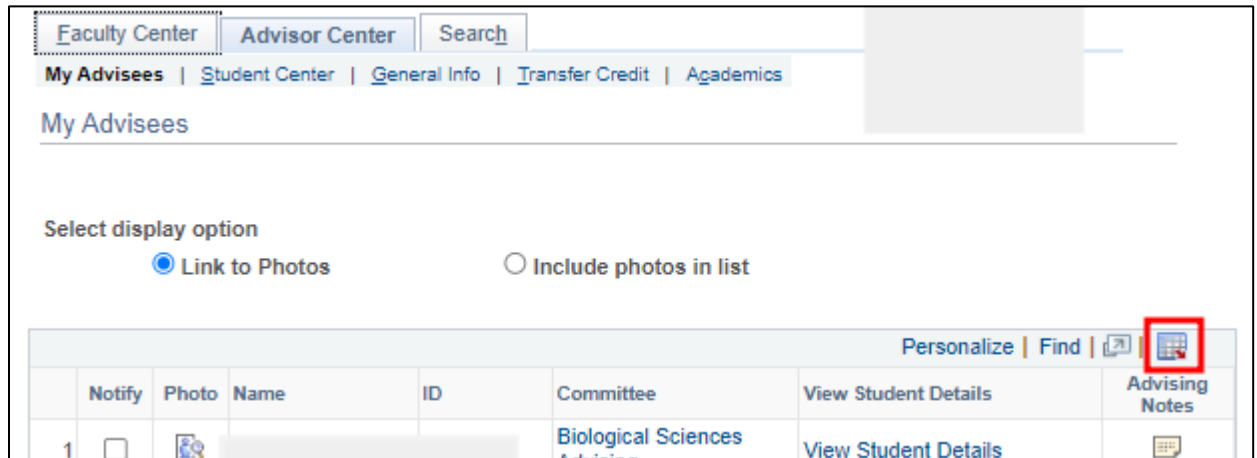
Often, you have queries from other systems that would be useful to your work within the Pathways system. Rather than recreating that list within Advanced Search or manually add students to a student list, you can load students into the system from the list you already have by uploading a .csv file.

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.

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
☒	Student 1	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 - School of Education, Admitted Test Optional, Dorm - Lothrop Hall, Enrollment A Progress (2026) - Satisfied, First Generation College Student, Good Academic Standing - 2241, Good Academic Standing - 2254, Junior, Kessler Scholars 2023, MINOR - Italian, MINOR - Secondary Education, Pittsburgh Campus-Undergrad, Provost Scholar, SHE/HER, Sports Science Guarantee Year

Lists & Saved Items

Select Upload Student List.

My Saved Items

Student Lists

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

+ Add Student List | **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

Select a Student List — Upload — Choose a Column — Complete

Select A Student List

Choose a list to add these students to

- Advisees for campaign
- New Student List

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

Select a Student List

Upload

Choose a Column

Complete

Upload

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

Choose File

kburns sample CSV.csv

Click to upload the file

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