Office of the Provost

Pathways Reports Templates

Reports

Student Success Team
5-1-2025

Table of Contents

How to use the Pathways Reports Templates 3

How to Save a Report Template 5

How to Export Reports 6

Reports for All Advisors 7

- Progress Reports Report 7
- Student Enrollments Report 8
- Students Report 9

Additional Reports 11

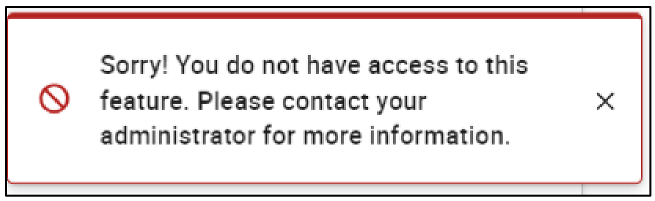
- Appointments Report 11
- Appointment Summaries Report 12
- Appointment Campaigns Report 13
- Availabilities Report 14
- Cases Report 15
- Referrals Report 16
- Notes Report 17
- Check-Ins Report 18

Description of Date Field Conditions 19

How to use the Pathways Reports Templates

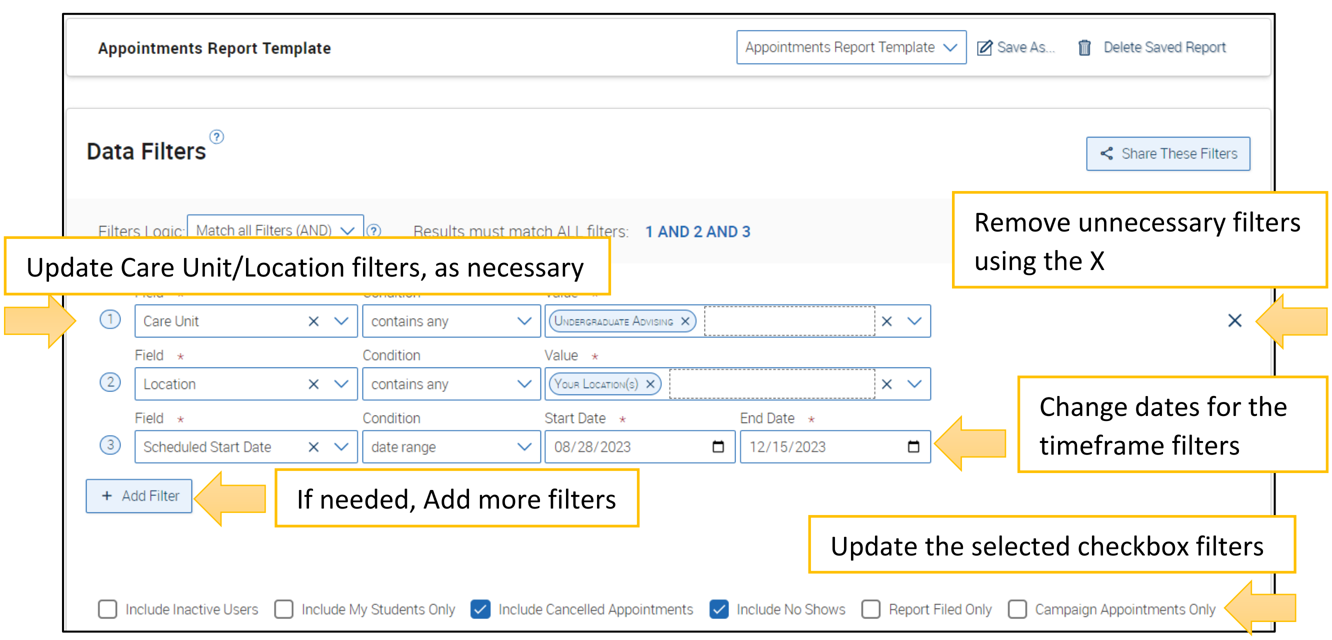
Click the link of a Pathways template report from this document (**templates can be found beginning on Page 7 of this document**).

Note: Not all Pathways Users have access to all reports. Contact your supervisor or the Pathways Team for more information.

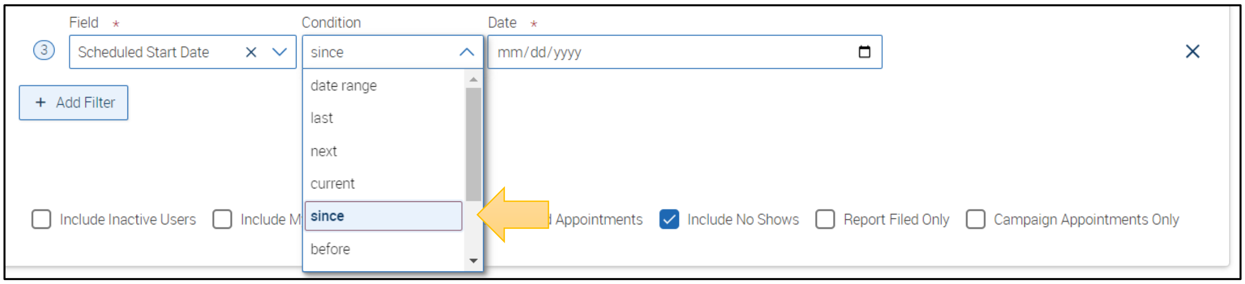


From the report that opens, edit the template filters to fit your needs.

For Pathways usage/appointment-based reports, the *Care Unit* and *Location* you select should match your availability. Use type-ahead functionality if you do not see the value when scrolling through the available options.



Use the Condition drop down to further adjust your filters to customize the report or make it easier to run. See the Description of Date Field Conditions at the end of this document for more information about selecting the condition.



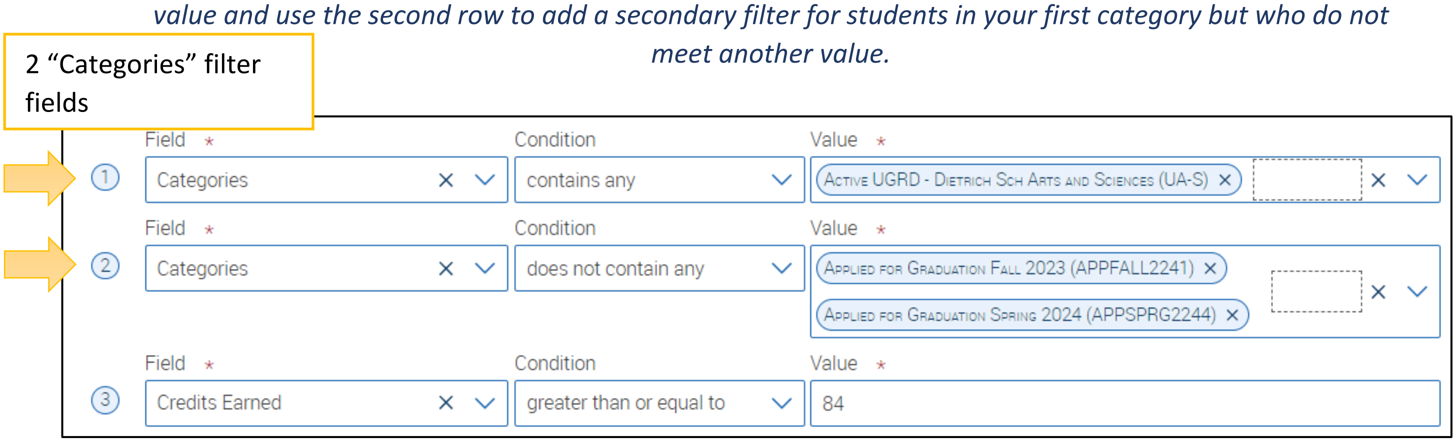
Many filter fields use the same Boolean logic for condition fields as the advanced search feature.

Use **(In Any of these)** if you have several categories and you want to find students if they match at least one of the categories

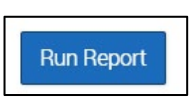
Use **(In All of these)** if you have several categories and you want to find students only if they 'check all of the boxes' (meet all of the criteria identified in all of the categories)

Use **(In None of these)** if you want to find students in categories who 'are not / do not / have not'

Tip: You can add the same Field filter twice. For example, use one row to filter for students who meet a value and use the second row to add a secondary filter for students in your first category but who do not meet another value.



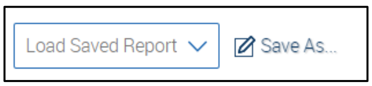
Click Run Report to see your report results.



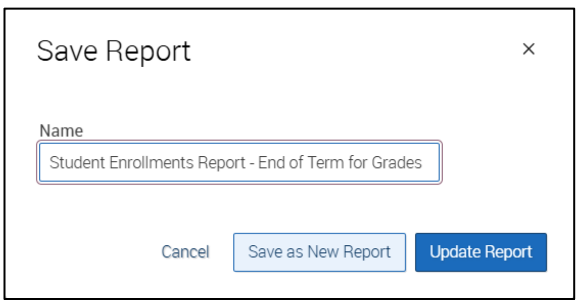
How to Save a Report Template

Saving reports allows you to re-use the template at a future time. Depending on the type of report and filters, you may just have to slightly update it for future use. This will help produce consistent reporting and also save you time by not having to re-create the report filters.
Saved reports also provide the benefit of saving any column changes you might make.

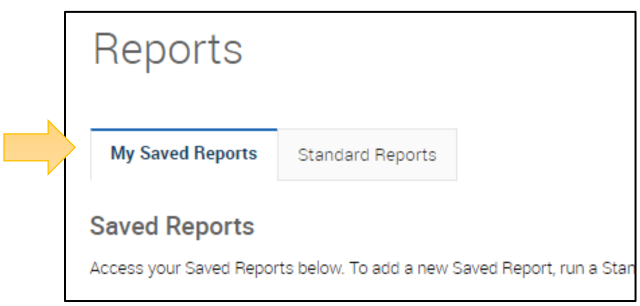
After you have created a report, click **Save As** at the top of the page to save the report as a new report template or to update the existing report template.



Name the report and press the blue **Update Report** button.



This saved report template will now show up on the My Saved Reports tab on your main reporting page.



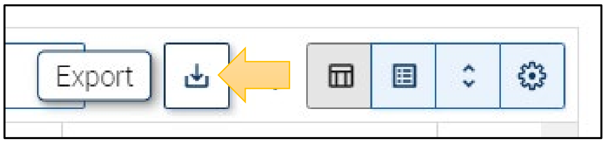
---

*Tip: Use **Saved Reports** as a way to save Report Templates, NOT as a way to save the report and associated data for your future reference.*

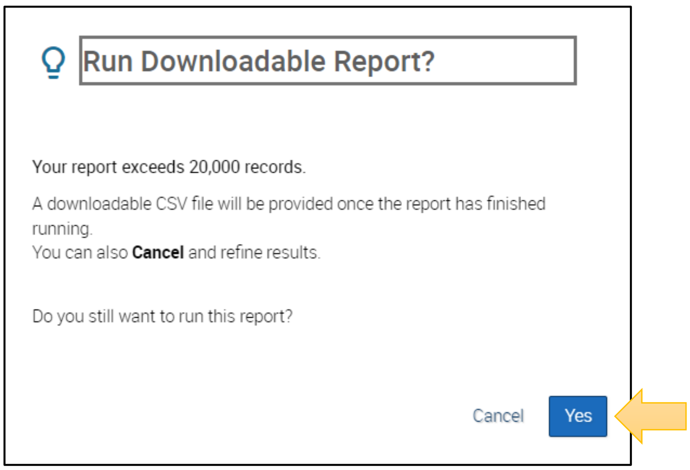
If you would like to save specific data collected from a report, you should Export the report and save the report/date in the appropriate location on your computer or network.

How to Export Reports

To export a report that you have run, press the **Export** button. Then choose the location on your computer or network where you would like to save the file.



If your results have more than 20,000 rows, you will receive the message below. Click the blue **Yes** button to generate the report which will be available to download.



When the report is ready, you will receive a pop-up message instructing you to download your report from the Download Center for Reports. Click the link in this message.

The Download Center for Reports can also be accessed from the **Quick Links** section on the right side of your staff homepage.

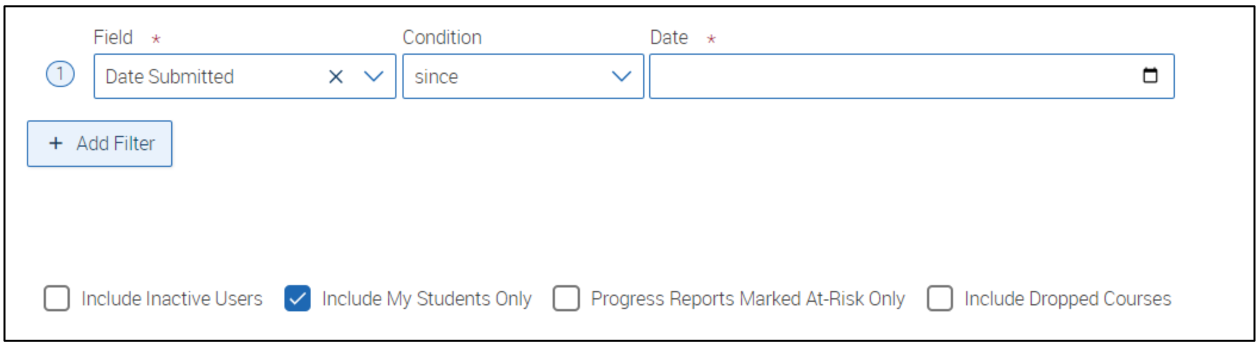
Reports for All Advisors

Progress Reports Report

Progress Reports Report

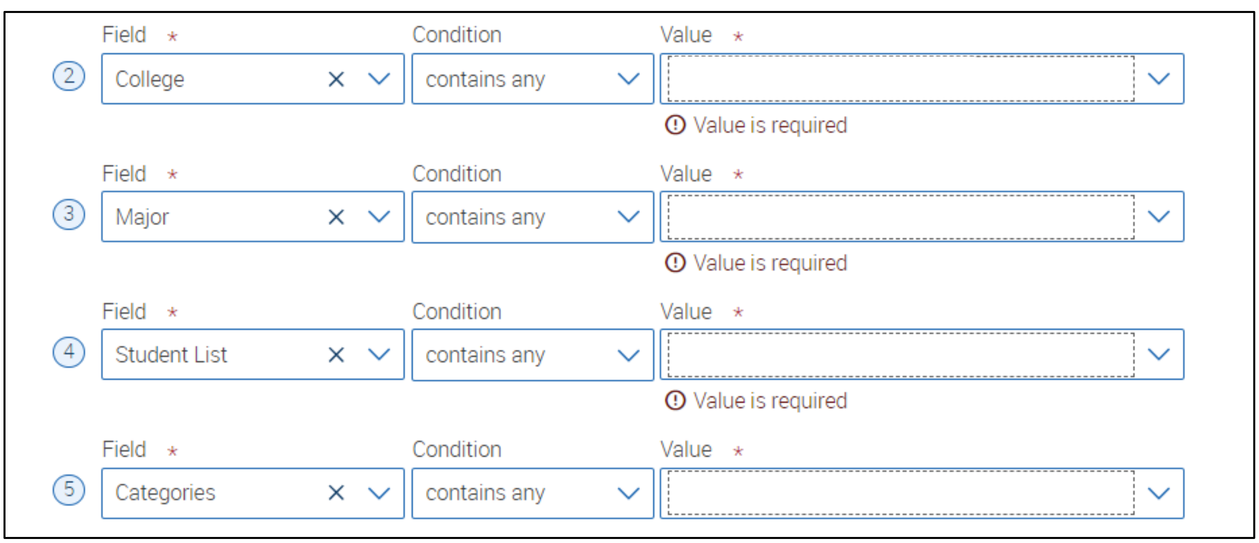
(*For advisors with Assigned Students in PeopleSoft/Pathways)*

This template returns the advisor's assigned students who have had progress reports submitted for them since the selected Date. While other filter fields can be added, they are not necessary to run the report.



(*For administrators, advisors or other staff who do not have Assigned Students in PeopleSoft/Pathways)*

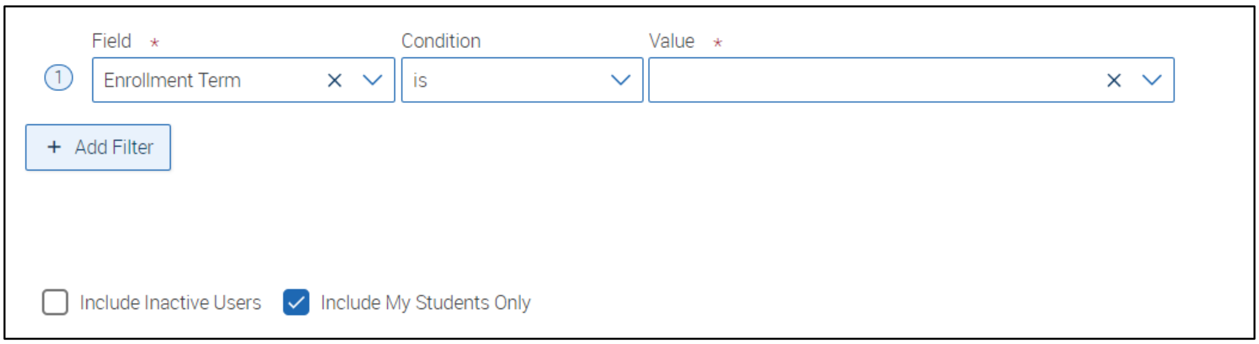
Use the same template above. Add additional Filters, as necessary (examples below), and remove the checkbox from "Include My Students Only." Uploading a student list that can be used as filter is the easiest way to get data on a desired population. *Sample filters included in the image below.* ***Only one of the additional filters is necessary****



Student Enrollments Report

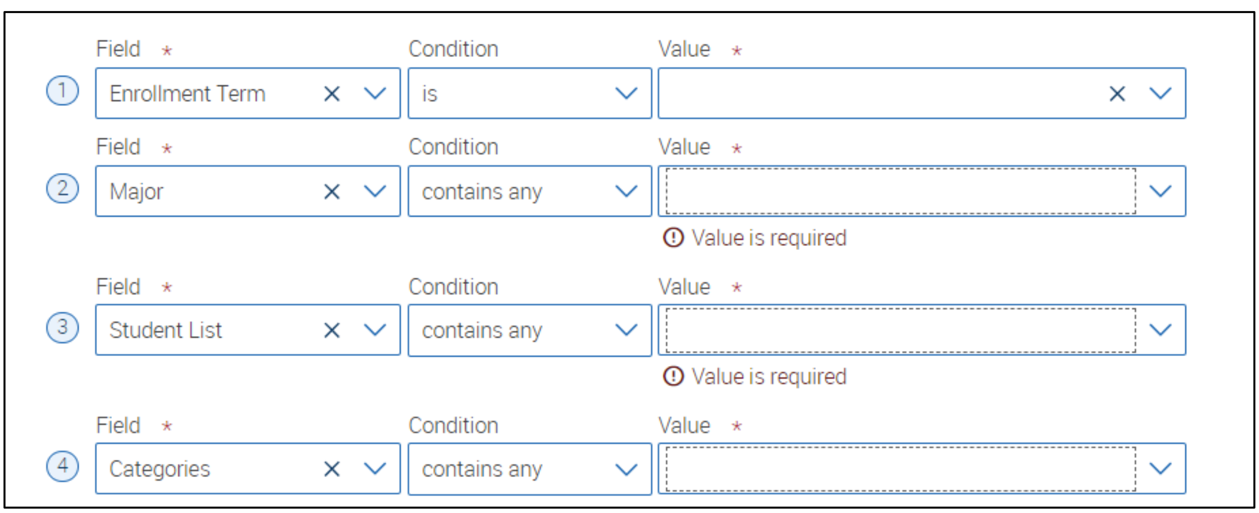
(*For advisors with Assigned Students in PeopleSoft/Pathways)*

This template returns the advisor's students and their enrollment information (including all dropped courses) for the selected term. While other filter fields can be added, they are not necessary to run the report.



(*For administrators, advisors or other staff who do not have Assigned Students in PeopleSoft/Pathways)*

Use the same template above. Add additional Filters, as necessary, and remove the checkbox from "Include My Students Only." Uploading a student list that can be used as filter is the easiest way to get data on a desired population. *Sample filters included in the image below.* ***Only one of the additional filters is necessary.***

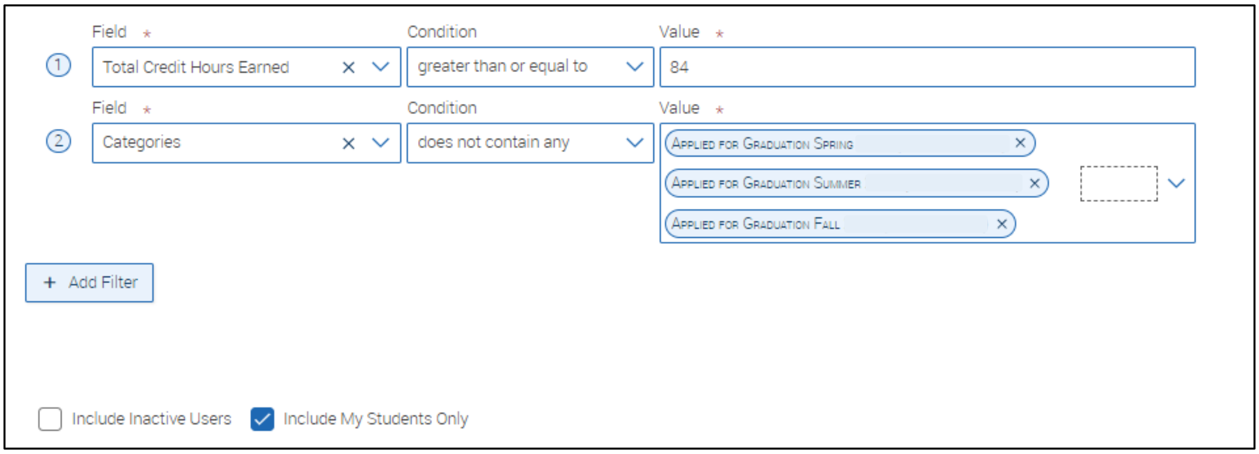


Students Report

Students Report (preparing for graduation)

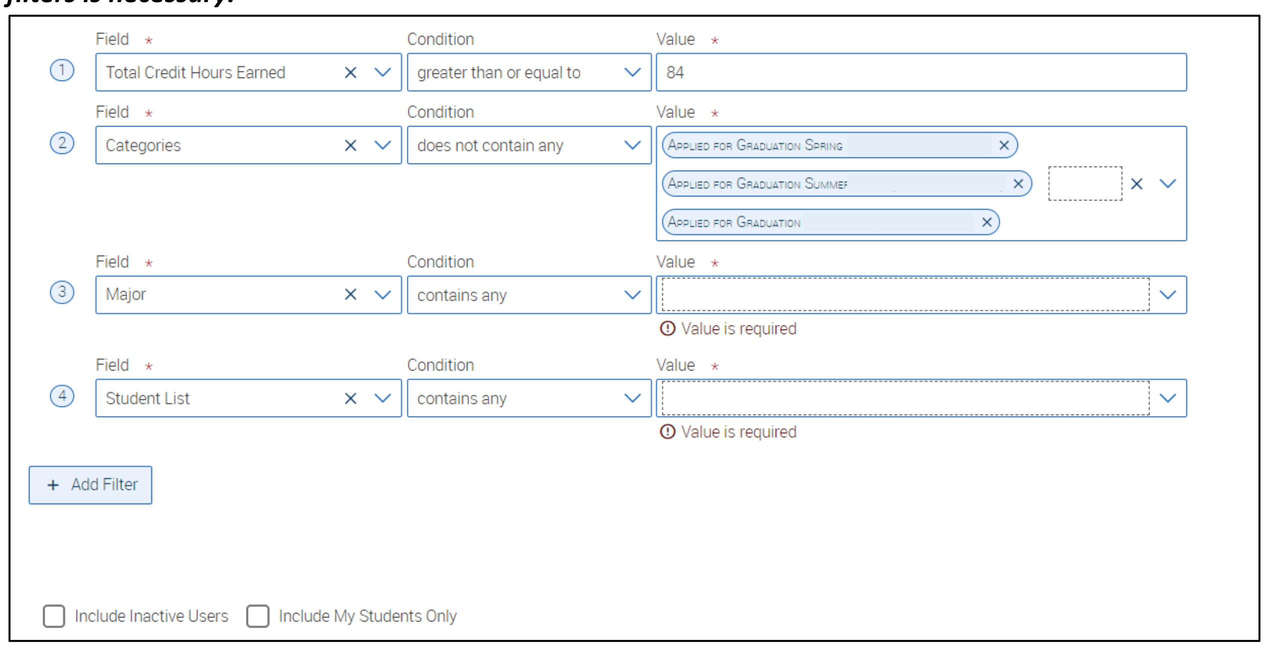
(*For advisors with Assigned Students in PeopleSoft/Pathways)*

This template returns the advisor's assigned students who have 84 or more credits but have not yet applied for graduation in the selected Terms. *This report is essentially an Advanced Search, but in Reports format which provides additional searching capabilities.*



(*For administrators, advisors or other staff who do not have Assigned Students in PeopleSoft/Pathways)*

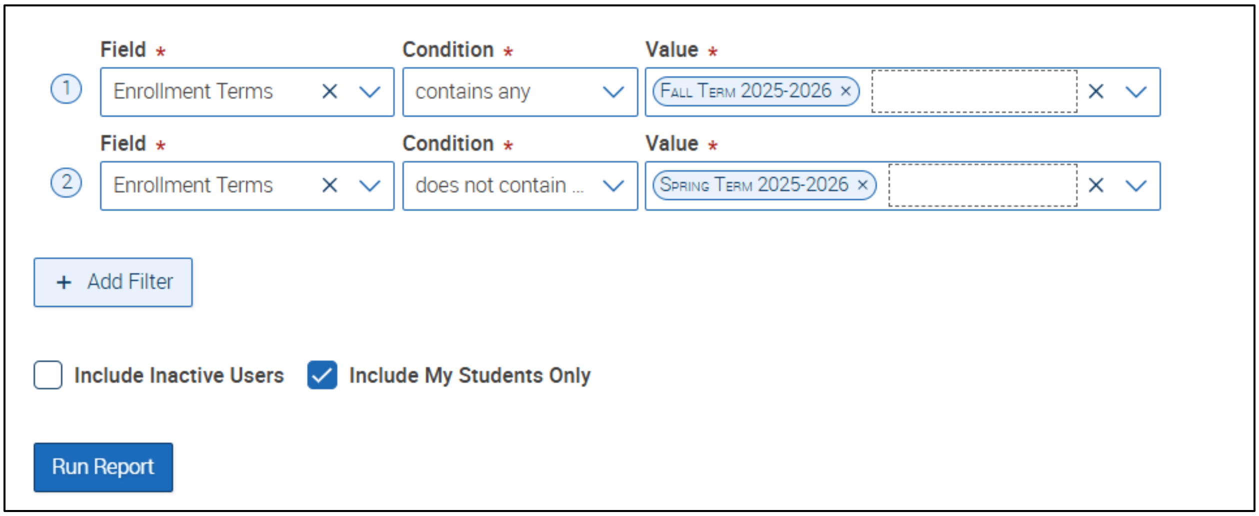
Use the same template above. Add additional Filters, as necessary, and remove the checkbox from "Include My Students Only." Uploading a student list that can be used as filter is the easiest way to get data on a desired population. *Sample filters included in the image below.* ***Only one of the additional filters is necessary.***



Students Report (checking for next term enrollment)

(*For advisors with Assigned Students in PeopleSoft/Pathways)*

This template returns the advisor's assigned students who are enrolled in the current term, but not enrolled in the future term. *This report is essentially an Advanced Search, but in Reports format which provides additional searching capabilities. Note: be sure to adjust for the current and future terms, as needed.*



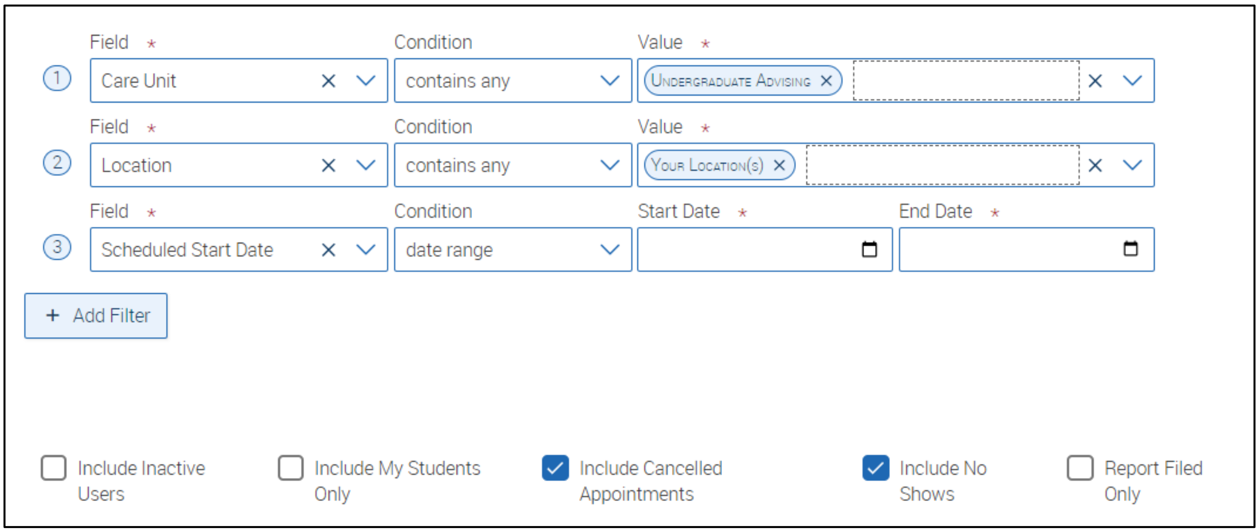
(*For administrators, advisors or other staff who do not have Assigned Students in PeopleSoft/Pathways*)

Use the same template above. Add additional Filters, as necessary, and remove the checkbox from "Include My Students Only." Uploading a student list that can be used as filter is the easiest way to get data on a desired population.

Appointments Report

This template returns all appointments (including canceled appointments and No Shows) created in the chosen Care Unit and Location, between the selected Range of Dates.

Note: If you do not get any results, it could be that the Care Unit and Location do not match (i.e., the Location is not associated with the selected Care Unit.) The selections you make here should be identical to the various ones you choose when creating availability.

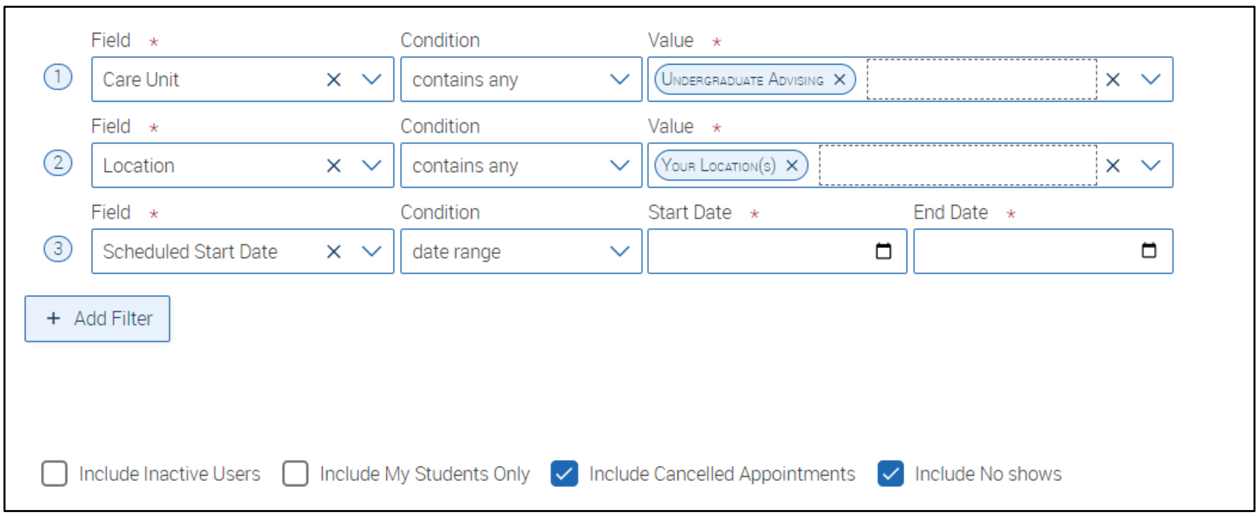


Appointment Summaries Report

This template returns all appointment summaries created in the chosen Care Unit and Location between the selected Range of Dates.

This report will NOT return appointments that do not have a completed appointment summary. Use the Appointments Report if you want to return all appointments that were created in a selected Care Unit and Location.

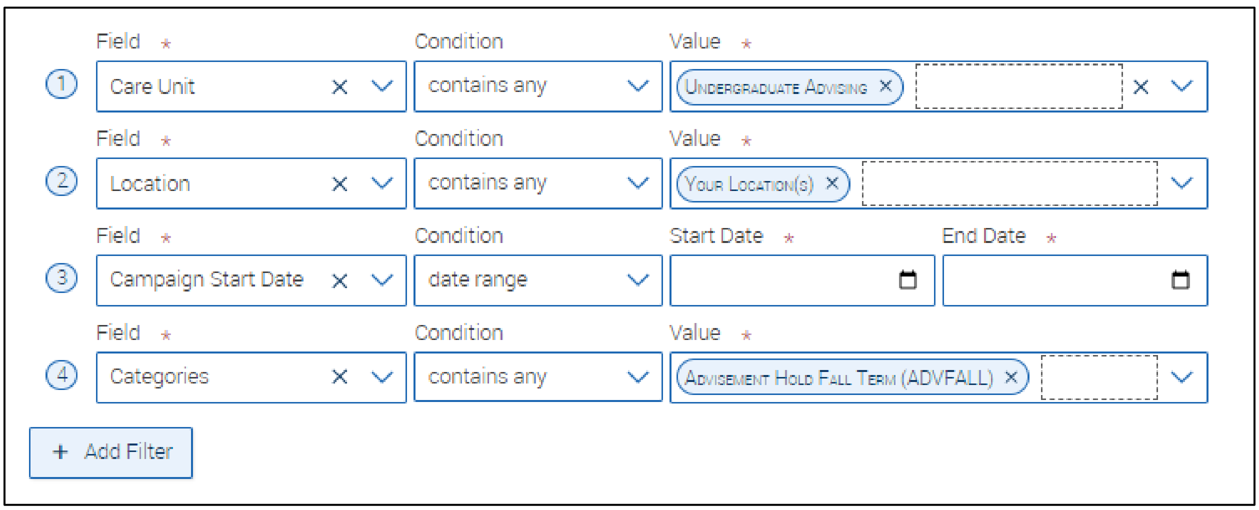
Note: If you do not get any results, it could be that the Care Unit and Location do not match (i.e., the Location is not associated with the selected Care Unit.) The selections you make here should be identical to the various ones you choose when creating availability.



Appointment Campaigns Report

This template returns students who did not respond to an appointment campaign they were included in, who also still have an advising hold. It will look for students in any campaign that was started between the selected Range of Dates, and in the selected Care Unit and Location.

Note: If you do not get any results, it could be that the Care Unit and Location do not match (i.e., the Location is not associated with the selected Care Unit.) The selections you make here should be identical to the various ones you choose when creating availability.

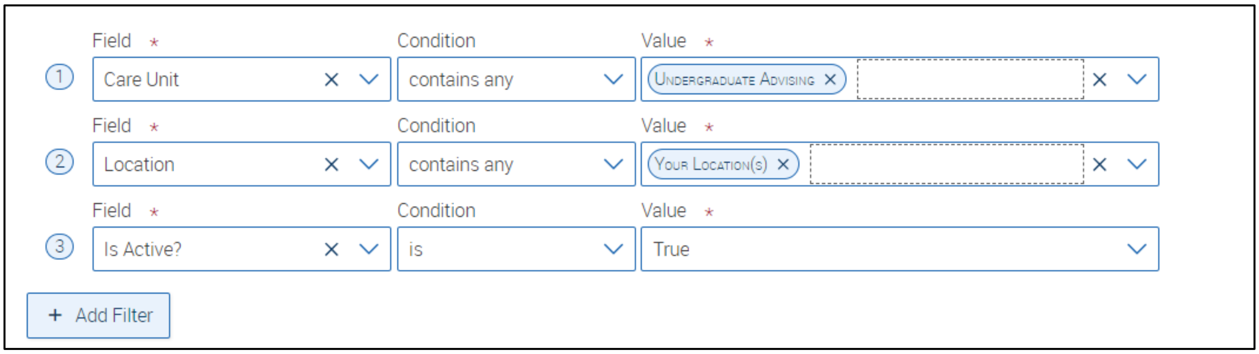


Tip: It is not necessary to include both a Location AND a Care Unit filter. (I.e., you could just look for students who are in an Undergraduate Advising campaign in ANY Location by simply removing the Location filter field.

Availabilities Report

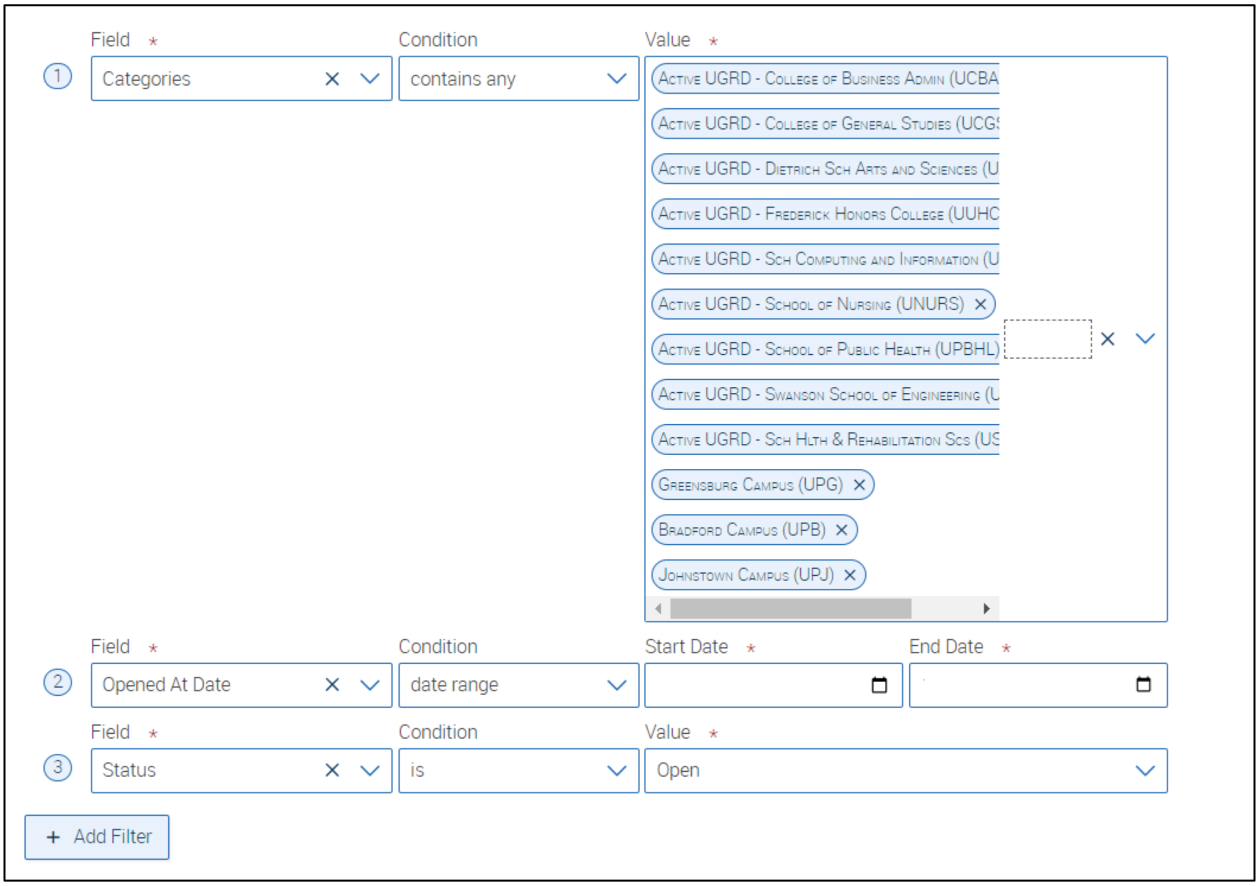
This template returns staff who have Active availability in the chosen Care Unit and Location.

Note: If you do not get any results, it could be that the Care Unit and Location do not match (i.e., the Location is not associated with the selected Care Unit.) The selections you make here should be identical to the various ones you choose when creating availability.



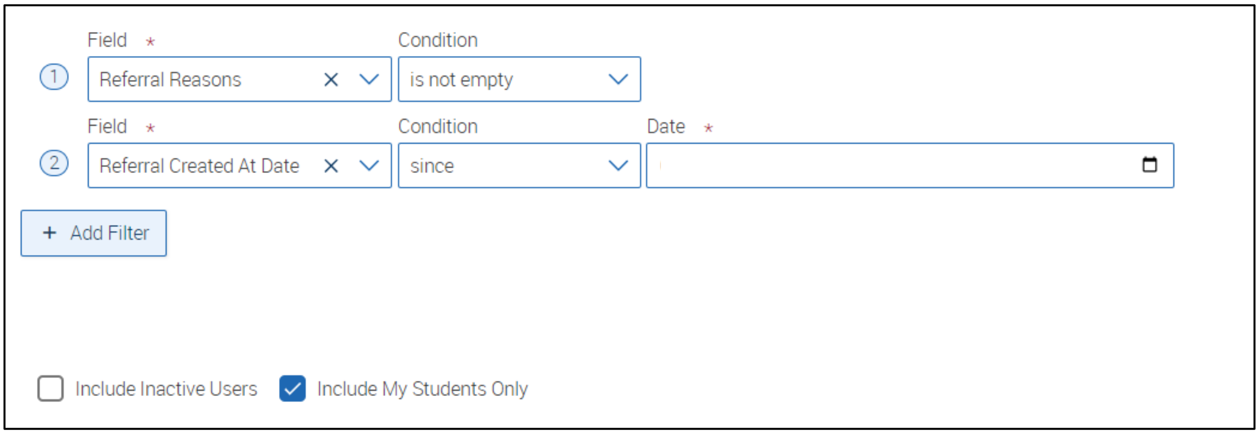
Cases Report

This template returns students in the selected School population, with referrals submitted between the selected Range of Dates, and where the associated case remains Open for the referral.



Referrals Report

This template returns the advisor's assigned students who have had referrals submitted for them since the selected Date.



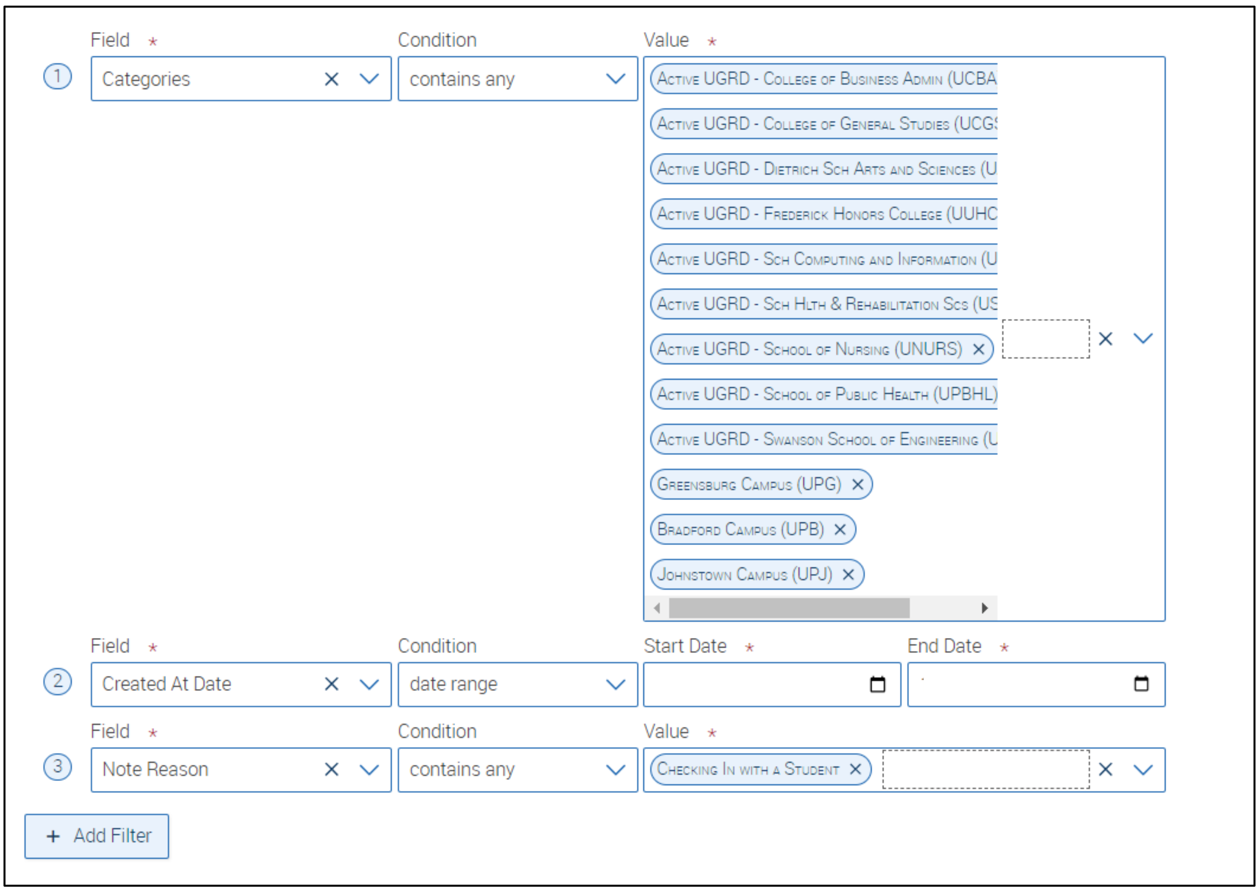
For administrators, advisors or other staff who do not have Assigned Students in PeopleSoft/Pathways, you can add an Active School or Campus category to find all referrals for active students in the selected school/campus category.

Notes Report

Notes Report

This template returns students in the selected School population, who haves notes submitted between the selected Range of Dates, and where the note was submitted under the selected Note Reason. To see all notes submitted for the selected student population, remove the Note Reason field.

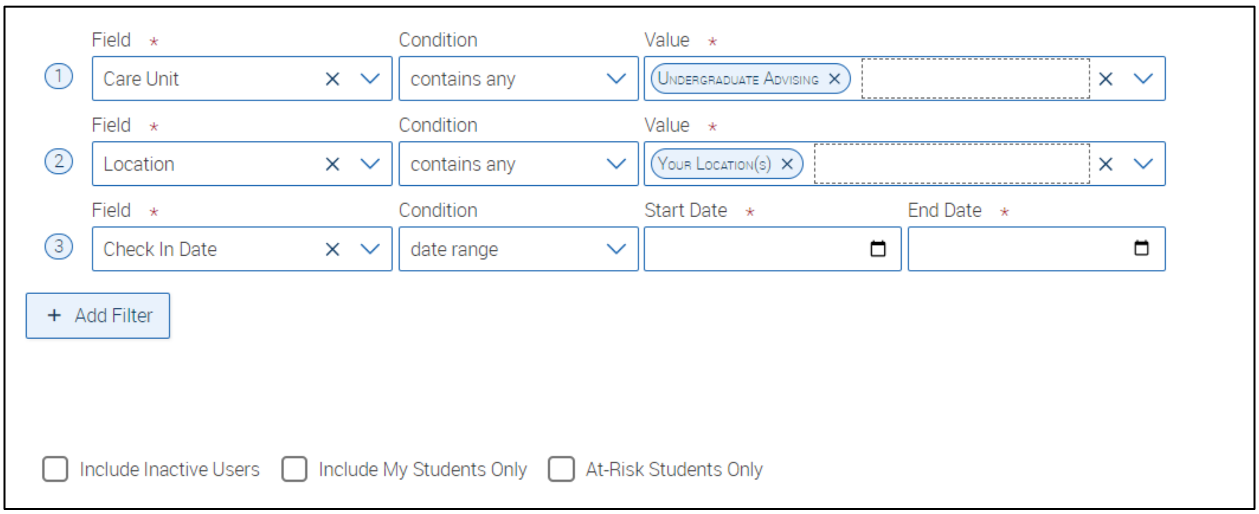
Reminder: the note reason is selected by the staff member when the note is written. If a note reason is not selected when creating a note, then for that note to show up on this report, the note reason field must be removed.



Check-Ins Report

This template returns students who were Checked-In for services in the chosen Care Unit and Location, between the selected Range of Dates. This includes appointment check-ins, track time visits (study hall), and record visit check-ins.

Note: If you do not get any results, it could be that the Care Unit and Location do not match (i.e., the Location is not associated with the selected Care Unit.) The selections you make here should be identical to the various ones you choose when creating availability.



Description of Date Field Conditions

A **date field** is any field where the data stored in the element is related to date. Examples of date fields include *Created At Date*, *Check In Date, Scheduled Start Date* and *Date Submitted.*

The table below explains the results that each condition will return.

Condition Name	**Description**
Date Range	Results will include data submitted on the selected start date, through and including the selected end date.
Last	Results will include data from the previous X full days, excluding 'today.' *Example: If selecting 1 the data will be for 'yesterday.' Similarly, 5 the data will be for yesterday + the 4 prior days. If selecting 1 week you will get data for the previous full week, not the last 7 consecutive days. Similarly, 1 calendar year will give the previous full year, not the last 365 days.*
Next	The results will include data for the upcoming X full days, excluding 'today'. Examples similar to the above, but will provide data for the future. Tip: You can add a second filter to include the current day.
Current	Results will include data from the current day (today), week, month or year.
Since	Results will include data beginning with (and including) the selected date, through (and including) present day.
Before	Results will include all data before, but not including, the selected date.
After	Results include data submitted after, but not including, the selected date.
Is Empty	Indicates there is no data in the field selected.
Is Not Empty	Indicates the field has data and will often be used to pull up all data in a report.