



Office of the Provost

Pathways Reports Templates

Reports

Pathways Team
2-15-2024

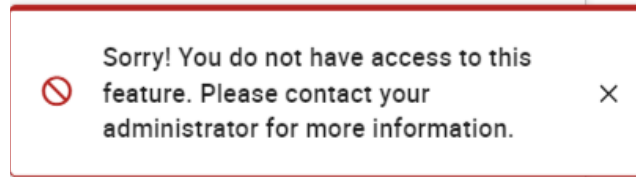
Table of Contents

How to use the Pathways Reports Templates	3
Exporting Reports	6
Reports for All Advisors.....	7
Progress Reports Report	7
Student Enrollments Report	8
Students Report	9
Additional Reports	10
Appointments Report	10
Appointment Summaries Report	11
Appointment Campaigns Report	12
Availabilities Report	13
Cases Report	14
Referrals Report	15
Notes Report	16
Check-Ins Report.....	17

How to use the Pathways Reports Templates

1. Click the link of a Pathways template report (**templates can be found beginning on Page 7 of this document**) or select a report that you previously created and saved from your My Saved Reports tab.

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



2. From the report that opens, edit the filters by removing and/or adding values, or changing dates. Click the Add Filter button to add new filters. Or remove existing filters using the X at the far right of the page. These filters are used in place of the Advanced Search criteria in V2 reports

The new values you choose should align with the Care Unit and Location you use when creating your availability to meet with students. Use type-ahead functionality if you do not see the value when scrolling through the available options.

Appointments Report Template Appointments Report Template Save As... Delete Saved Report

Data Filters [?] Share These Filters

Filters Logic: Match all Filters (AND) [?] Results must match ALL filters: 1 AND 2 AND 3

Field *	Condition	Value *	Start Date *	End Date *
① Care Unit x	contains any	UNDERGRADUATE ADVISING x		
② Location x	contains any	YOUR LOCATION(S) x		
③ Scheduled Start Date x	date range		08/28/2023 x	12/15/2023 x

+ Add Filter

Include Inactive Users Include My Students Only Include Cancelled Appointments Include No Shows Report Filed Only Campaign Appointments Only

3. Use the Condition drop down to further adjust your filters to customize the report or make it easier to run.

Field * Scheduled Start Date x v Condition since ^ mm/dd/yyyy x
+ Add Filter
date range
last
next
current
since
before
 Include Inactive Users Include M... appointments Include No Shows Report Filed Only Campaign Appointments Only

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.

① Field * Categories x v Condition contains any v Value * Active UGRD - DIETRICH SCH ARTS AND SCIENCES (UA-S) x v
② Field * Categories x v Condition does not contain any v Value * APPLIED FOR GRADUATION FALL 2023 (APPFALL2241) x APPLIED FOR GRADUATION SPRING 2024 (APPSPRG2244) x v
③ Field * Credits Earned x v Condition greater than or equal to v Value * 84

The above Students Report would generate results that includes Active students in the Dietrich School of Arts and Sciences and who have greater than or equal to 84 credits but have not yet applied for graduation for the Fall or Spring term.

4. Click Run Report to see your report results.



5. 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.



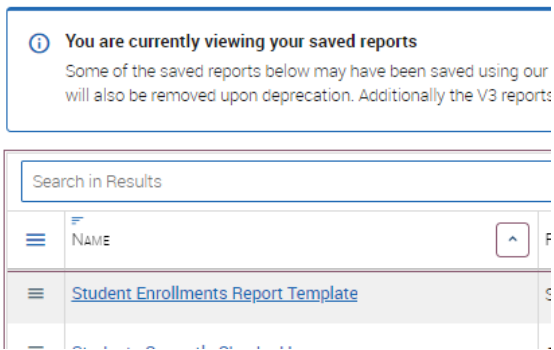
6. This saved report template will now show up on the My Saved Reports tab on your main reporting page.

Reports



Saved Reports

Access your Saved Reports below. To add a new Saved Report, run a Stan



Tip: Saved Reports are best thought of as only a Report Template so that you do not have to recreate the report filters each time you want to run a report.

If you would like to save specific data collected from a report, it is recommended to create a report using your Saved Report, and then Export the report that is generated which can then be saved in the appropriate location on your computer or network.

Exporting Reports

1. 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.



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

Run Downloadable Report?

Your report exceeds 20,000 records.

A downloadable CSV file will be provided once the report has finished running.

You can also **Cancel** and refine results.

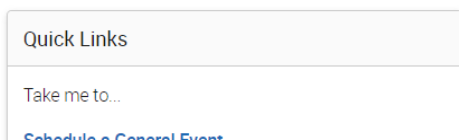
Do you still want to run this report?

Cancel **Yes**

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.



3. 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.

Field *	Condition	Date *
① Date Submitted ✕ ▼	since ▼	08/28/2023 📅

+ Add Filter

Include Inactive Users Include My Students Only Progress Reports Marked At-Risk Only Include Dropped Courses

[Progress Reports 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****

Field *	Condition	Date *
① Date Submitted ✕ ▼	since ▼	01/08/2024 📅
② College ✕ ▼	contains any ▼	Value * 📅
<small>Ⓜ Value is required</small>		
③ Major ✕ ▼	contains any ▼	Value * 📅
<small>Ⓜ Value is required</small>		
④ Student List ✕ ▼	contains any ▼	Value * 📅
<small>Ⓜ Value is required</small>		
⑤ Categories ✕ ▼	contains any ▼	Value * 📅

+ Add Filter

Include Inactive Users Include My Students Only Progress Reports Marked At-Risk Only Include Dropped Courses

Student Enrollments Report

[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.

	Field *	Condition	Value *	
①	Enrollment Term	is	Fall Term 2023-2024	X

+ Add Filter

Include Inactive Users Include My Students Only

[Student Enrollments 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.***

	Field *	Condition	Value *	
①	Enrollment Term	is	Spring Term 2023-2024	X
②	Major	contains any		X
			ⓘ Value is required	
③	Student List	contains any		X
			ⓘ Value is required	
④	Categories	contains any		X

+ Add Filter

Include Inactive Users Include My Students Only

Students Report

Students Report

(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.*

	Field *	Condition	Value *
①	Total Credit Hours Earned x v	greater than or equal to v	84
②	Categories x v	does not contain any v	APPLIED FOR GRADUATION SPRING 2024 (APPSPRG2244) x APPLIED FOR GRADUATION SUMMER 2024 (APPSUMM2247) x APPLIED FOR GRADUATION FALL 2024 (APPFALL2251) x

+ Add Filter

Include Inactive Users Include My Students Only

Students 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.*

	Field *	Condition	Value *	
①	Total Credit Hours Earned x v	greater than or equal to v	84	x
②	Categories x v	does not contain any v	APPLIED FOR GRADUATION SPRING 2024 (APPSPRG2244) x APPLIED FOR GRADUATION SUMMER 2024 (APPSUMM2247) x APPLIED FOR GRADUATION FALL 2024 (APPFALL2251) x	x
③	Major x v	contains any v	<input type="text"/>	x
			⊖ Value is required	
④	Student List x v	contains any v	<input type="text"/>	x
			⊖ Value is required	

+ Add Filter

Include Inactive Users Include My Students Only

Additional Reports

Appointments Report

[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.

	Field *	Condition	Value *
①	Care Unit <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	UNDERGRADUATE ADVISING <input type="text" value="x"/> <input type="text" value="v"/>
②	Location <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	YOUR LOCATION(S) <input type="text" value="x"/> <input type="text" value="v"/>
③	Scheduled Start Date <input type="text" value="x"/> <input type="text" value="v"/>	date range <input type="text" value="v"/>	Start Date * <input type="text" value="08/28/2023"/> <input type="text" value="c"/> End Date * <input type="text" value="12/15/2023"/> <input type="text" value="c"/>

- Include Inactive Users
- Include My Students Only
- Include Cancelled Appointments
- Include No Shows
- Report Filed Only

Appointment Summaries Report

[Appointment Summaries Report](#)

This template returns all appointment summaries created in the chosen Care Unit and Location between the selected Range of Dates. *Note: This report will NOT return appointments that do not have a completed summary. Use the Appointments Report if you want to return all appointments that were created in a selected Care Unit and Location.*

①	Field *	Condition	Value *	
	Care Unit × ▾	contains any ▾	UNDERGRADUATE ADVISING × ▾	
②	Field *	Condition	Value *	
	Location × ▾	contains any ▾	YOUR LOCATION(S) × ▾	
③	Field *	Condition	Start Date *	End Date *
	Scheduled Start Date × ▾	date range ▾	08/28/2023 📅	12/15/2023 📅

+ Add Filter

Include Inactive Users Include My Students Only Include Cancelled Appointments Include No shows

Appointment Campaigns Report

[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.

	Field *	Condition	Value *
①	Care Unit <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	UNDERGRADUATE ADVISING <input type="text" value="x"/> <input type="text" value="v"/>
②	Location <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	YOUR LOCATION(S) <input type="text" value="x"/> <input type="text" value="v"/>
③	Campaign Start Date <input type="text" value="x"/> <input type="text" value="v"/>	date range <input type="text" value="v"/>	Start Date * <input type="text" value="01/08/2024"/> <input type="text" value="c"/> End Date * <input type="text" value="04/26/2024"/> <input type="text" value="c"/>
④	Categories <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	ADVISEMENT HOLD FALL TERM (ADV FALL) <input type="text" value="x"/> <input type="text" value="v"/>

Availabilities Report

Availabilities Report

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

	Field *	Condition	Value *
①	Care Unit × ▾	contains any ▾	UNDERGRADUATE ADVISING × ▾
②	Location × ▾	contains any ▾	YOUR LOCATION(S) × ▾
③	Is Active? × ▾	is ▾	True ▾

+ Add Filter

Cases Report

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.

Field *	Condition	Value *
① Categories	contains any	<ul style="list-style-type: none">ACTIVE UGRD - COLLEGE OF BUSINESS ADMIN (UCBA)ACTIVE UGRD - COLLEGE OF GENERAL STUDIES (UCG)ACTIVE UGRD - DIETRICH SCH ARTS AND SCIENCES (UACTIVE UGRD - FREDERICK HONORS COLLEGE (UUHCACTIVE UGRD - SCH COMPUTING AND INFORMATION (UACTIVE UGRD - SCHOOL OF NURSING (UNURS)ACTIVE UGRD - SCHOOL OF PUBLIC HEALTH (UPBHL)ACTIVE UGRD - SWANSON SCHOOL OF ENGINEERING (LACTIVE UGRD - SCH HLTH & REHABILITATION Scs (USGREENSBURG CAMPUS (UPG)BRADFORD CAMPUS (UPB)JOHNSTOWN CAMPUS (UPJ)
② Opened At Date	date range	Start Date: 08/28/2023 End Date: 12/22/2023
③ Status	is	Open

+ Add Filter

Referrals Report

[Referrals Report](#)

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

	Field *		Condition		Date *
①	Referral Reasons	✕	is not empty	▼	
②	Referral Created At Date	✕	since	▼	08/28/2023

+ Add Filter

Include Inactive Users Include My Students Only

Notes Report

Notes Report

This template returns students in the selected School population, who have 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.*

Field *	Condition	Value *
① Categories <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	<div style="border: 1px solid #ccc; padding: 5px;"><p>ACTIVE UGRD - COLLEGE OF BUSINESS ADMIN (UCBA)</p><p>ACTIVE UGRD - COLLEGE OF GENERAL STUDIES (UCG)</p><p>ACTIVE UGRD - DIETRICH SCH ARTS AND SCIENCES (U</p><p>ACTIVE UGRD - FREDERICK HONORS COLLEGE (UUHC</p><p>ACTIVE UGRD - SCH COMPUTING AND INFORMATION (U</p><p>ACTIVE UGRD - SCH HLTH & REHABILITATION Scs (US</p><p>ACTIVE UGRD - SCHOOL OF NURSING (UNURS) <input type="text" value="x"/> <input type="text" value="v"/></p><p>ACTIVE UGRD - SCHOOL OF PUBLIC HEALTH (UPBHL)</p><p>ACTIVE UGRD - SWANSON SCHOOL OF ENGINEERING (U</p><p>GREENSBURG CAMPUS (UPG) <input type="text" value="x"/></p><p>BRADFORD CAMPUS (UPB) <input type="text" value="x"/></p><p>JOHNSTOWN CAMPUS (UPJ) <input type="text" value="x"/></p></div>
② Created At Date <input type="text" value="x"/> <input type="text" value="v"/>	date range <input type="text" value="v"/>	Start Date * <input type="text" value="08/28/2023"/> <input type="text" value="📅"/> End Date * <input type="text" value="12/15/2023"/> <input type="text" value="📅"/>
③ Note Reason <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	CHECKING IN WITH A STUDENT <input type="text" value="x"/> <input type="text" value="v"/>

Check-Ins Report

[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.

	Field *	Condition	Value *
①	Care Unit <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	UNDERGRADUATE ADVISING <input type="text" value="x"/> <input type="text" value="v"/>
②	Location <input type="text" value="x"/> <input type="text" value="v"/>	contains any <input type="text" value="v"/>	YOUR LOCATION(S) <input type="text" value="x"/> <input type="text" value="v"/>
③	Check In Date <input type="text" value="x"/> <input type="text" value="v"/>	date range <input type="text" value="v"/>	Start Date * <input type="text" value="08/28/2023"/> <input type="text" value="c"/> End Date * <input type="text" value="12/15/2023"/> <input type="text" value="c"/>

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