# Step 7: Generate and Download Reports

## Generate and Download Reports

Unit Administrators can navigate to the **Reports** page, and select the **Case Information** tab to run reports to gather data and status information on their APR cases.

Case Information reports allow for the creation of customized reports to gather data on customized criteria for one or more packets (cases) within one or more units (departments) for a specified date range. Case Information reports are a list of all the cases at the institution or departmental/unit level.

It is **recommended** that unit administrators use the optional job aid **Using Statuses to Track APRs**.

1.    Click **Reports** in the left-hand navigation bar under Review, Promotion & Tenure.

2.    Make sure you have selected the **Case Information** tab.

**The Report & Logs page will appear.**
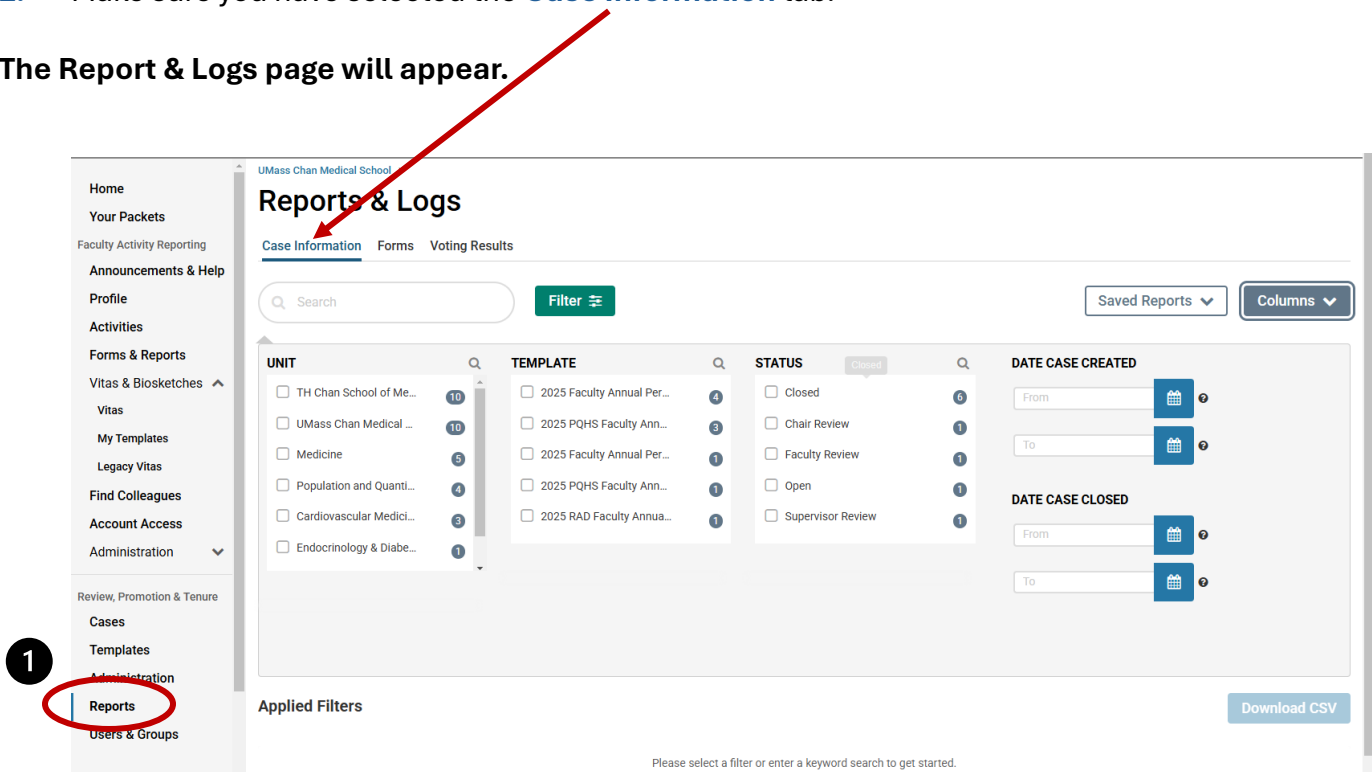


Unit administrators can select the **Unit**, **Template** name, **Status** and **data range** for the data they want to select.

3) To search for your **unit**, enter the name of your **department** in the search field at the top of the unit filter box. Select the desired **checkbox.** In this case Population and Quantitative Health Sciences.

4) Enter your department's abbreviation in the search box above the **Template** filter box. Select the desired **checkbox.**

5) Enter the begin and end dates into the **DATE CASE CREATED** field or enter the begin and end dates for the **DATE CASE CLOSED** field depending on the data you want to pull**.**

6) Select the **Columns** dropdown to specify the columns that appear on the report.



7) **Check the box next to the columns you want to show on your report.**

8) You can click **Save** under the *Applied Filters* section to save the filters and columns of the currently displayed report to be reloaded later.

**9)** **A pop-up menu will appear**. Fill in the **Report Name** field which is required and click the **Save** button.



**10)** **Reports on form responses** (e.g. Candidate/Faculty or Committee Forms) can be run for one or more packets in one or more units within a specified date range. In this case we selected from the APR's **General Information form**, the faculty members **Rank and Department**.

To download a **Report,** click the **Download CSV** button. A pop-up window will appear. Give the file a name and **save** it to your computer. CSV files can be easily converted to an excel spreadsheet.

**Applied Filters**

Population and Quantitative Health Sciences  ✕    2025 PQHS Faculty Annual Performance Review Supervisor  ✕    Save

Clear Filters

Download CSV

Showing 3 of 3 results

| Case ID | First Name | Last Name | Unit | Created Date | Closed Date | Status | Closed |
|---------|-----------|-----------|------|--------------|-------------|--------|--------|
| 684900 | Faculty | Member 2 | Population and Quantitative Health Sciences | Jan 28, 2025 | Feb 16, 2025 | Closed | Yes |
| 686559 | Faculty | Member 2 | Population and Quantitative Health Sciences | Jan 29, 2025 | Jan 31, 2025 | Faculty Review | No |
| 688067 | Faculty | Member 2 | Population and Quantitative Health Sciences | Jan 31, 2025 | Feb 1, 2025 | Chair Review | No |