

Appendix G: Creating Advanced Searches

Filtering Student Data

Advanced Search lets you create unique cohorts of students based on the layering of search parameters. The search results are used as the foundation for building [appointment campaigns](#) or tracking student progress. Queries pull lists of current students that fit the search parameters. Information in the results reflect *current* student data.

Advanced Search uses different logic statements to build queries. Most search filters create **AND** statements. As you build a search, the query identifies students that satisfy all the listed requirements.

Step 1: Click on the magnifying glass on the lefthand side of your home screen to open Advanced Search

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID) Type? Students ▾

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

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

Gender All ▾ Race All ▾ Watch List (In Any of These) All Transfer Student Any ▾

Category (In Any of these)? Baseball (A1) +

Tag (In Any of these)? Attended Orientation | +

Step 2: Each filter drawer has a collection of filters. They can be used alone or in conjunction with other filters - both within and across drawers - to build your customized search. Some filter fields need you to enter text; others provide options in a menu. There are three more options at the bottom of the search page to further restrict your search.

Advanced Search uses different logic statements to build queries. Most search filters create AND statements. As you build a search, the query identifies students that satisfy all the listed requirements.

Step 3: Select the current term in Enrollment History to yield the most accurate student data results.

Combine elements of other filters to search for students based on areas of study, including college affiliation, degree, concentration, and/or major.

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID) Type? Students ▾

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

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)? Spring Semester 2017 +

NOTE: While Advanced Search does not display historical data for students in the resulting list, you can create parameters based on historical conditions.

Appendix G: Saving Student Searches and Lists

Building Dynamic and Static Student Caseloads

Step 4: Once you have selected your specified search fields, click Search. The results display the current information for the students that fit the parameters of your search, which are displayed across the top.

Unsaved Student Search [Save](#)

Enrollment Terms: Fall 2024 [x](#) Majoring In: Biology [x](#) Min. Cumulative GPA: 2.00 [x](#) Max. Cumulative GPA: 3.00 [x](#) Min. Credits Earned 15 [x](#)

[Search](#) [Modify Search](#)

Actions ▾								
☐	NAME	STUDENT ID	STUDENT LIST	CUMULATIVE GPA	MAJOR	PREDICTED SUPPORT	CLASSIFICATION	CATEGORY
1. ☐	Abbott, Donna	57439028		2.86	Biology/Gender Studies	Moderate	Junior	Commuter student
2. ☐	Bernal, Karyn	53291847		2.67	Biology	Low	Sophomore	Honors student
3. ☐	Gonzales, Laura	90634817		2.64	Biology	Moderate	Sophomore	North Hall,Sport - Womens Soccer,Study Abroad - Interest
4. ☐	Hargrove, Jack	38506297		2.12	Biology	High	Junior	Honors student

Step 5: From here, you can take a variety of actions:

- Perform a task via the Actions menu with one, several, or all the students on this list, such as sending a Message, adding to an Appointment Campaign, or creating a Student List. You must select 'All Students' if there are more than 100 results in your search.
- Create a [Saved Search](#) by clicking the Save button next to the Unsaved Student Search title. You can also access previous saved searches from this page.
 - Saved searches lets users run a pre-configured Advanced Search without having to create the search again. Unlike [Student Lists](#), which save a static list of the same students, a saved search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters
- Modify the search. If you want to add to the original parameters selected, you can select Modify Search to return to the filter drawer view. You can also remove an existing parameter by clicking on the X icon to the right of each of your filter selections.

Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

Actions ▾		New Saved Search
☐	NAME	USED IN AUTOMATION
☐	Transfer1-1.5GPA	No
☐	Pell Eligible 1st and 2nd Years	Yes
☐	Undeclared LAS Students	No

NOTE: Because some tools in the platform display *all* Student Lists in filters, please use a standard naming convention for your Student Lists that explains the purpose of the list (e.g., F23 Senior His Maj, F24 Transfer 1st Gen). Talk to your Application Administrator if you have questions about the naming conventions for Student Lists at your institution.