

 Search

Advanced Search



Help Center Manager

1 month ago · Updated

[Follow](#)

Where: To access the Advanced Search filters, navigate to the **Advanced Search** magnifying glass icon on the left side tool bar.

Who: The Advanced Search functionality allows **faculty, staff,** and **administrators** to layer a series of filters onto a specific query in order to customize student searches.

Conditions: The ability to use Advanced Search and the filters available to you are determined in your user role configurations; these permissions include the ability to view the Search Page, to perform a search with filters beyond keyword, and to view different types of information in the results or use these values as search parameters (ex: GPA values, predicted risk levels, gender, or ethnicity). The Advanced Search feature is part of the **Strategic Care** module.

Table of Contents

- [Feature Overview](#)
 - [Getting Oriented](#)
 - [How Does Advanced Search Work?](#)
 - [Filter Drawers Overview](#)
- [Frequently Asked Questions](#)
- [Related Articles](#)

Feature Overview

The Advanced Search function within Navigate allows you to create unique cohorts of students based on the layering of various search parameters, the results of which can be used as the foundation for building [appointment campaigns](#) or tracking student progress. Queries will pull lists of *current* students that fit the parameters of the search, and information populating in the results will be a *current* reflection of student data. **The Advanced Search functionality is not meant to be a historical search.** Unlike other parts of the platform, changing the **Global Term Selector** does not impact the results of the Advanced Search except in the case of Classification and Category in the results returned page.

The basic search functionality allows you to search by Keywords or User Type. The additional filter drawers allow you to create more nuanced searches.

Note: Depending on your level of access and the modules utilized by your institution, some of the following drawers or filters within them may not be available to you as you build your queries.

Getting Oriented

Each drawer contains a collection of filters that can be used alone or in conjunction with other filters (within or across drawers) to build a customized search. Some fields will require that you enter free text, while others will provide options in a drop-down menu:

At the bottom of the page, there are three additional selection options to further qualify your search:

- **My Students Only** will limit the possible results to only your assigned students. Advisor assignments can be direct, one-to-one assignments, or indirect major or category assignments. Tutors most commonly have direct, one-to-one student assignments. Students are assigned to professors based on their course rosters.
- **At-Risk Students Only** will limit the possible results to only students that have been flagged as at-risk via a progress report.
- **Include Inactive** will expand the possible results to both active and inactive students. By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

How Does the Advanced Search Work?

The Advanced Search uses different logic statements to build queries. Most search filters create **AND** statements. As you build a search by laying on various filters within or across drawers, the query will identify students that satisfy all the listed requirements.

Example: A search for 'Major: Biology' **AND** 'Classification: Junior' **AND** 'Predicted Risk Level: Moderate' will pull a list of Junior students in the Biology program with a Moderate predicted risk

level.

However, there are some filters that create 'OR' statements, where you can make multiple selections within a given field to increase the scope of your search. These search fields are indicated by the presence of an 'In **Any** of these' identifier in the title.

Example: This search will pull a list above of all students who are either Pell Eligible OR on the Baseball team—a student does not need to satisfy both requirements.

Filters that allow you to make 'OR' statements include:

- Category
- Tag
- Enrollment Term
- College/School
- Major
- Concentration
- Degree
- Classification
- Post Degree Goal
- Favorite Fields
- Favorite Majors
- Predicted Risk Level

Example: 'Major: Biology **OR** Chemistry' **AND** 'Classification: Junior **OR** Sophomore' **AND** 'Predicted Risk Level: Moderate **OR** Low'. This search will pull a list of Junior or Sophomore students that are in either Biology or Chemistry with either Moderate or Low risk levels.

You can also create logic statements within a given field. These filters are identified via a **plus sign icon**, which expands the field when selected:

While 'Any' statements allow for the creation of more inclusive searches, selections made in 'In **All** of these' or in 'In **None** of these' fields serve to limit the scope of a search.

Example: This search will pull a list of students who are Pell Eligible but are NOT on the baseball team.

It is important to note that while the Advanced Search does not display historical data for students in the resulting list, you can create parameters based on historical *conditions*. The following drawers contain filters that allow you to query based on data defined on a term-by-term basis:

- Enrollment History
- Term Data

- Course Data

Example: 'Term: Fall Semester 2016' **AND** 'Classification: Sophomore'. This search will pull a list of *current* students who *were* sophomores in Fall 2016. The resulting data on those students will also be reflective of their *current* term information, not information specific to Fall 2016.

Once you have selected the search fields, click '**Search**' at the bottom of the screen. The results that generate will display the current information for the students that fit the parameters of your search (which are displayed across the top of the From here, you can take action:

- **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**.
- **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.
- 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 selection.

Filter Drawers Overview

Student Information: Use this group of filters to search for students by personal identifying information, such as name, student ID, category, tag, or transfer status.

Enrollment History: Create logic statements to search for students by their enrollment status in a variety of terms.

Area of Study: Combine elements of this filter to search for students based on areas of study, including college affiliation, degree, concentration, or major.

Performance Data: Search using these filters to segment student groups by GPA, credits earned, and hours attempted.

Term Data: Select conditions within this group of filters to run a search for students using information associated with a specific term.

Course Data: Utilize this group of filters to query students based on courses, section, and status.

Assigned To: Enter information into fields in this bucket to pull lists of students assigned to specific team members. Note that users that have the User Type or who have had a relationship in the past WILL NOT appear if they don't currently have that relationship with a student. For example, an advisor who has no students assigned to them will not appear. This is also the drawer that allows users to search for students WITHOUT a certain relationship type, e.g. students without advisers.

Goals & Interests: Make selections in this drawer to identify a cohort of students based on academic interest data reported by students via the [My Major](#) feature in Navigate Student.

Surveys: Select a question in this drawer to find aggregate data on student responses to [Quick Polls](#) as reported in Navigate Student.

Success Indicators: Run a search using these filters to identify students based on predicted risk level or success marker completion status.

For more information about what kinds of queries to run with these sets of filters, please refer to the Advanced Search User Guide attached at the end of this article.

Frequently Asked Questions

How does historical data appear in Advanced Search?

The Navigate platform is not designed for comprehensive historical data searches and to understand the breadth of data available for running historical searches to implement strategic campaigns at your campus, please contact your Strategic Leader to see the time frame that you can use in your searches. For true historical data reporting, please refer to the Institutional Reports.

Can I use Advanced Search to run historical searches?

No. While historical data may be in your advanced searches, it is not a tool to analyze historical data. To analyze historical data in the platform, please use Institutional Reports.

What is the impact of the global term filter in Advanced Search?

The global term filter impacts the ability to see student's Classification, GPA, and assigned Categories in the current term. It should not impact the results (# of students per filters applied), however will determine the additional student information shown in the results.

For example – if you were to choose a term filter outside of the current term (i.e. Spring 2017), the student's Classifications/Categories/etc. would likely not appear.

Is there a maximum number of Student ID's that can be copy-and-pasted into Advanced Search?

300 is the maximum number of IDs you can paste into the Advanced Search that will work consistently and regularly.

What happens if I was an advisor in previous terms but have no students assigned to me in the current term?

Users that have had a relationship type in the past WILL NOT appear if they don't currently have that relationship with a student. For example, an advisor who has no students assigned to them will

not appear. However, you will appear in a saved search if you have appeared in it in the past and the saved search did not delete you.

In the Academic Plan Filter Drawer Drawer, for Student has Not Planned Terms, does this include students who haven't accepted the changes yet? What are the criteria for a student to populate from a Student Has Not Planned Terms query?

A course enters "planned courses" when it is either A- accepted from advisor suggestion B- dragged by student or C- registered in different system. So, if a student has not viewed the advisor plan, those courses don't count.

Related Articles

- [Strategic Care - Saved Searches](#)
- [Strategic Care - Student Lists](#)
- [Strategic Care - Appointment Campaigns](#)
- [Smart Guidance - Quick Polls](#)
- [Smart Guidance - My Major](#)
- [Identifying Specific Student Populations](#)
- [Identifying & Intervening with At-Risk Students](#)

 [Advanced Search User Guide_5.pdf](#)

600 KB · [Download](#)

 3

Was this article helpful?

Yes

No

3 out of 4 found this helpful

Have more questions? [Submit a request](#)

[Return to top](#) 

Comments

3 comments

Sort by 



Help Center Manager



0



Small updates to the guide and article to reflect the addition of the Not Assigned option in the Assigned To filter; e.g. you can now search for students WITHOUT advisors/tutors/etc via Advanced Search



Amy Hyler-Essig



0



You may want to update this article as the advanced filters are now visible by default (you do not need to check "show advanced filters" to see all the options)



Community Manager



0



Thank you for your comment, Amy!

We have updated this article to reflect that all the Advanced Search filter drawers are visible by default when you open Advanced Search.



Best,

Jessie (Community Manager)

