Navigate: How to use Advanced Search

Filtering Student Data

The **Avanced Search** feature in Navigate helps staff and faculty identify unique cohorts of students based on the layering of search parameters. Users are able to layer a series of filters to customize student searches. To view and access the Advanced Search feature and some drawers or filters within the search, users must have the appropriate access permissions.

Search results can be 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**.

Please Note: Data in Navigate is pulled directly from Banner in a nightly feed. This results in the data being reflected from the previous 24 hours, which could result in small discrepancies such as a student adding or dropping classes/credit hours.

Changing the term does not impact the results of the Advanced Search, except in the case of Classification and Category.

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

Note: Some of the following drawers or filters within them may **not** be available to you as you build your queries. Talk to your Application Administrator, if you have

Getting Oriented

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.

Advanced Search allows you to pinpoint specific student populations. This could range from a general search of your advisees to a narrowed list of Sophomores who are Economic majors with at least 54 credits.

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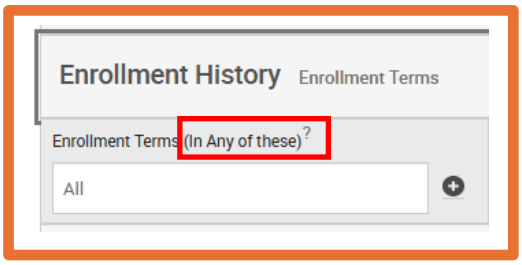
How Does Advanced Search Logic Work?

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.

Example: A search for Major: Biology **AND** Classification: Junior **AND** Predicted Support Level: Moderate pulls a list of Junior Biology majors with a Moderate predicted support level.

- There are some filters that create **OR** statements. OR statements let you make multiple selections in a given field to increase the scope of your search. These search fields are indicated by the presence of an **In Any of these** identifiers in the title.



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 Support Level

Example: Major: Biology OR Chemistry AND Classification: Junior OR Sophomore AND Predicted Support Level: Moderate OR Low. This search pulls a list of Junior or Sophomore students that are in either Biology or Chemistry with either Moderate or Low support levels.

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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 limit the scope of a search.

Note: While 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 2023 AND Classification: Sophomore. This search pulls a list of current students who were sophomores in Fall 2023. The resulting data on those students will also be reflective of their current term information, not information specific to Fall 2023.

Once you have selected the 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.

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 drawer to search for students based on areas of study, including college affiliation, degree, concentration, or major.
Term Data - Select conditions within this group of filters to run a search for students using information associated with a specific term.
Performance Data - Search using these filters to segment student groups by GPA, credits earned, and hours attempted.
Course Data - Use this group of filters to query students based on courses, section, and status. Only courses with associated sections for the term will be available for selection within this filter.
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 advisors.
LMS Assignments – Data from this field are sourced from assignments imported from the Learning Management System (LMS) – Bright Space.
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 Navigate360 Student.
Polls - Select a question in this drawer to find aggregate data on student responses to Intake Survey questions as reported in Navigate360 Student. Note this does not include Survey Builder surveys or Survey Campaign surveys.
Success Indicators - Run a search using these filters to identify students based on predicted support level or success marker completion status.

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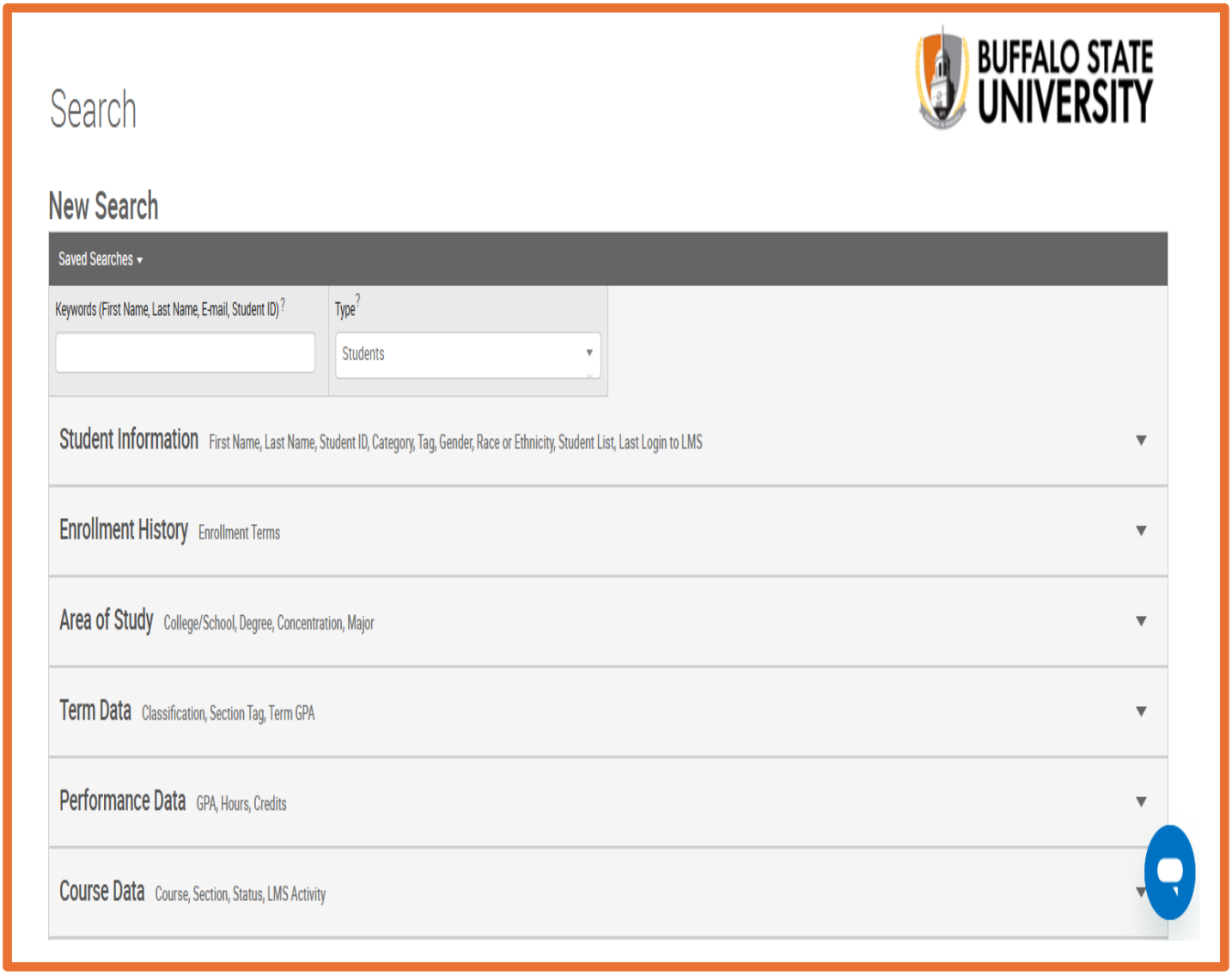

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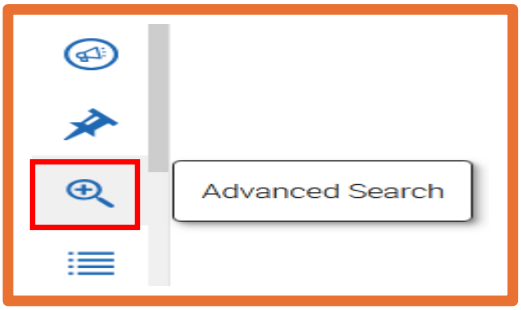
Step 1: From the **Staff Home** page, click on the magnifying glass on the left-hand side of your home screen to open **Advanced Search**.



Note:

1. **My Students Only** limits the possible results to only your assigned students, as identified on your **Staff Home** page.
2. **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.

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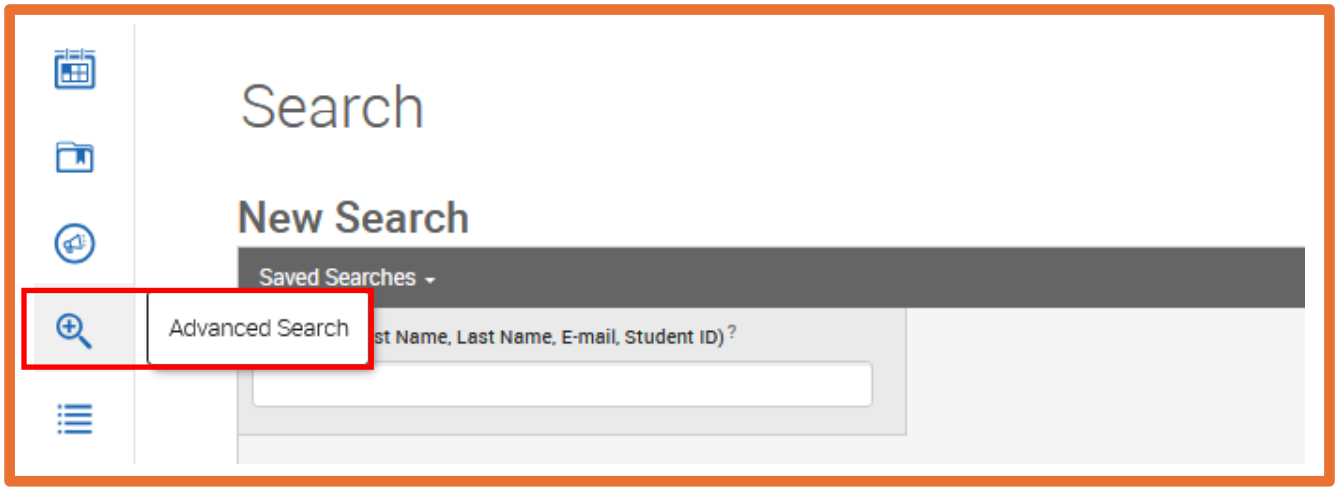
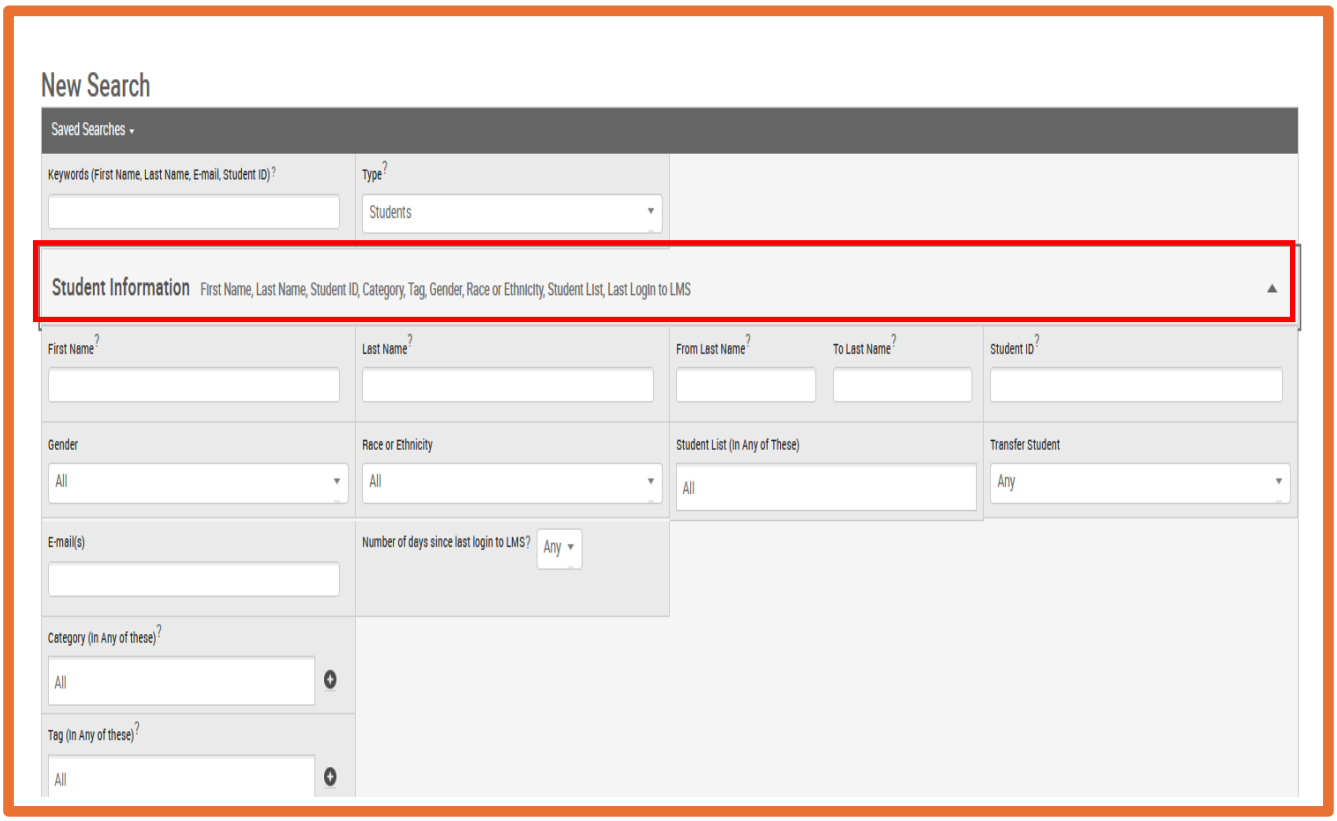
From your **Staff Home** page, click on the **Advanced Search** icon to start your search.





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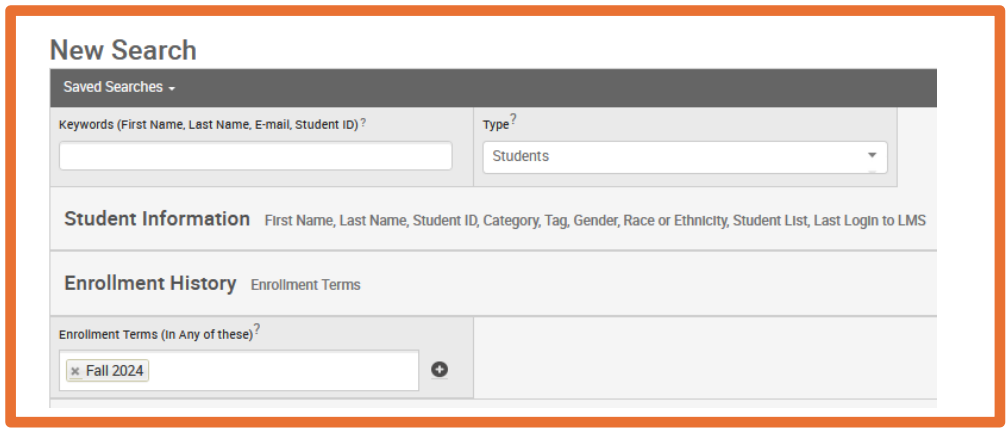
Step 2: Each filter drawer has a collection of filters. They can be used alone or in conjunction with other filters - both within and across drawers - to build your customized search. Some filter fields need you to enter text; others provide options in a menu. There are three more options at the bottom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

As previously discussed, **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.



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

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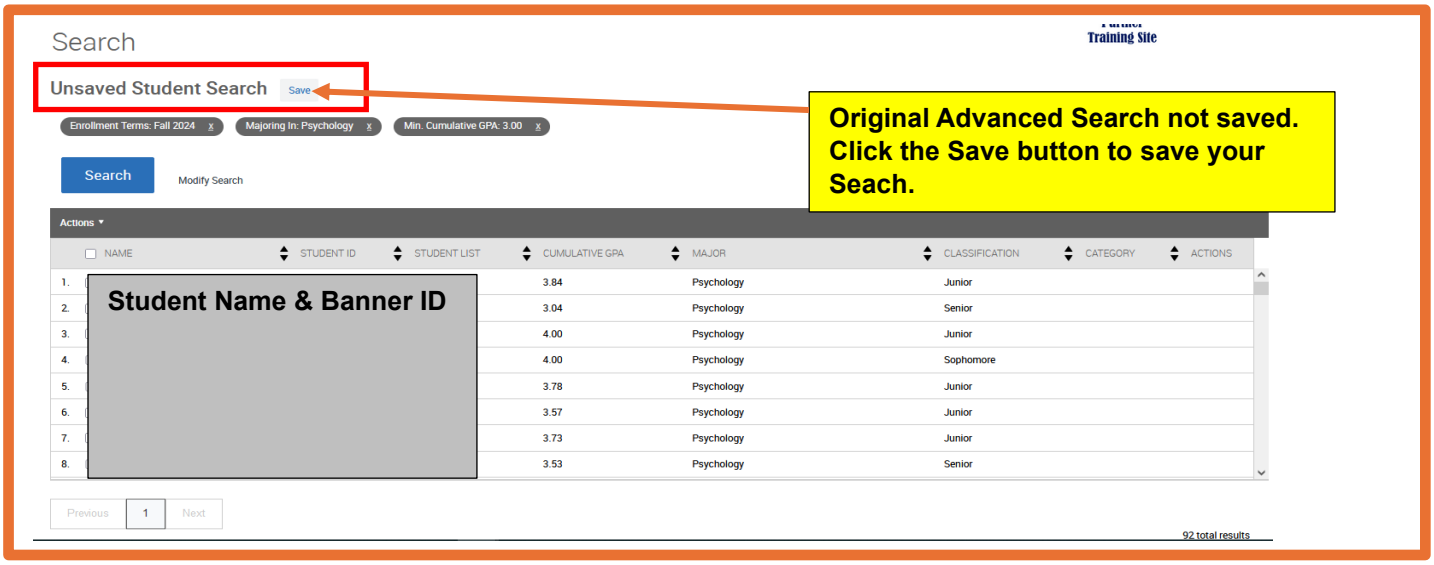
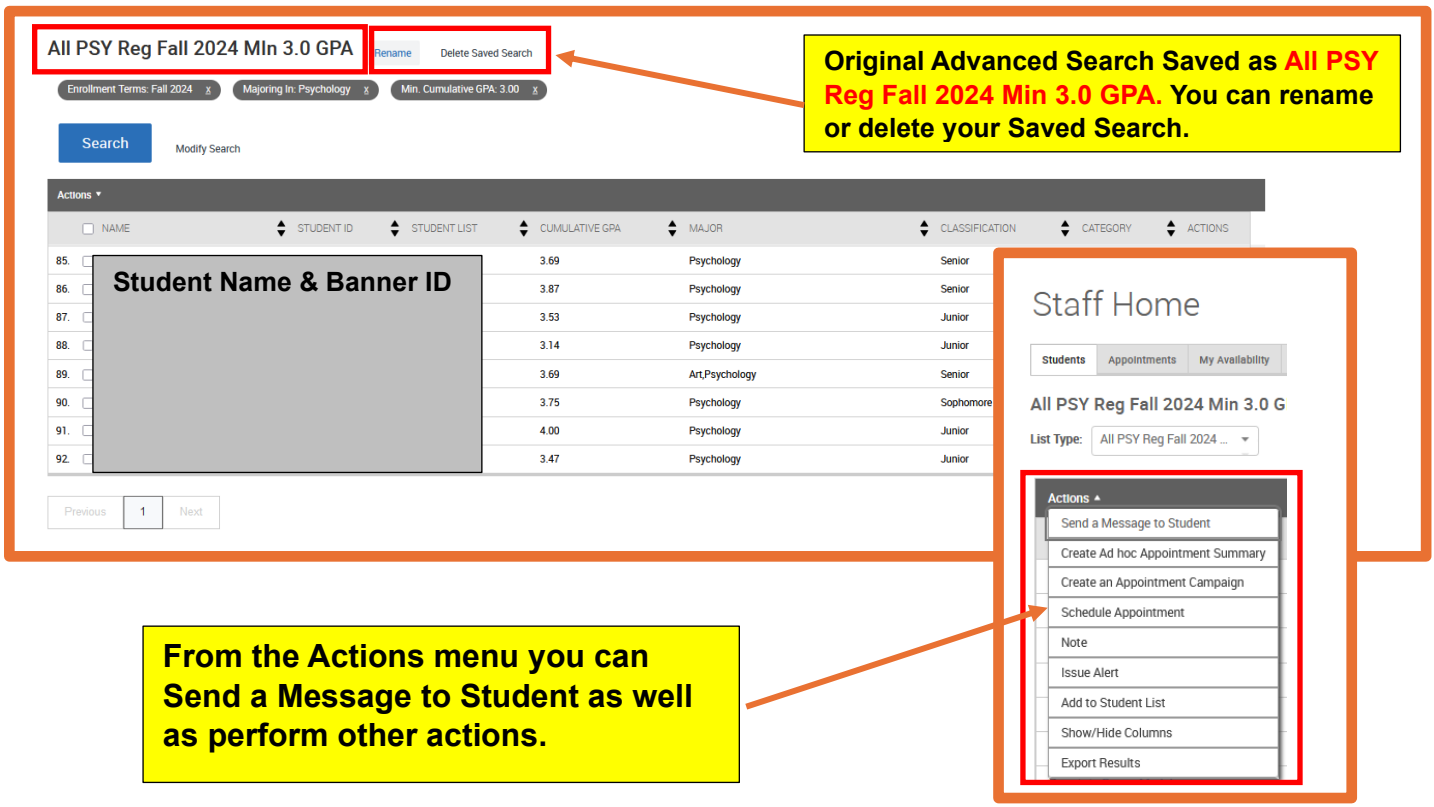
Saving Student Searches and Lists





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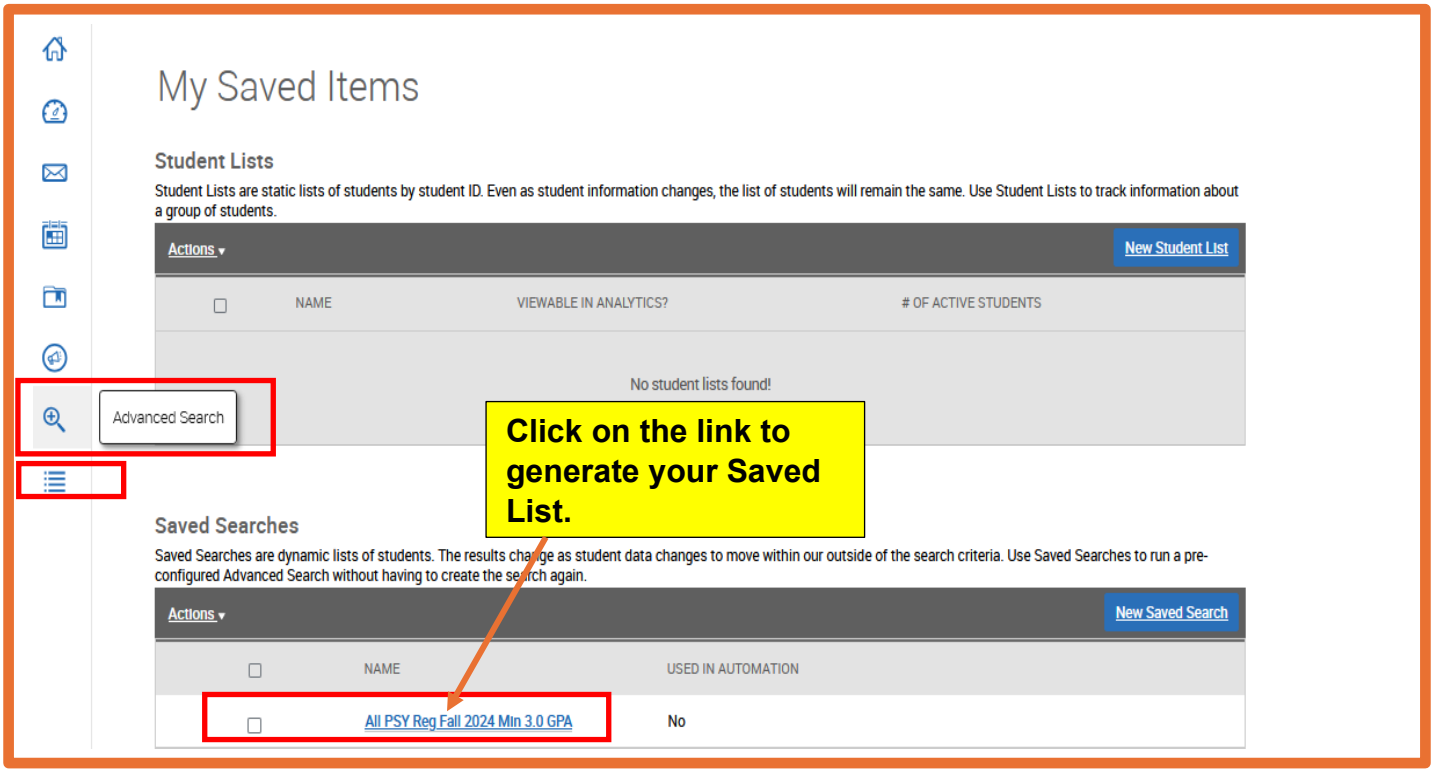
Saved Searches vs. Saved Lists

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.

***Static data** is data that remains constant or doesn't change frequently over time. It's also known as fixed data
***Dynamic data** is data that changes frequently, often in real-time.

Modify your 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.

You can access your new search under **Lists & Saved Items** on the right-hand menu. The icon looks like a bulleted list.



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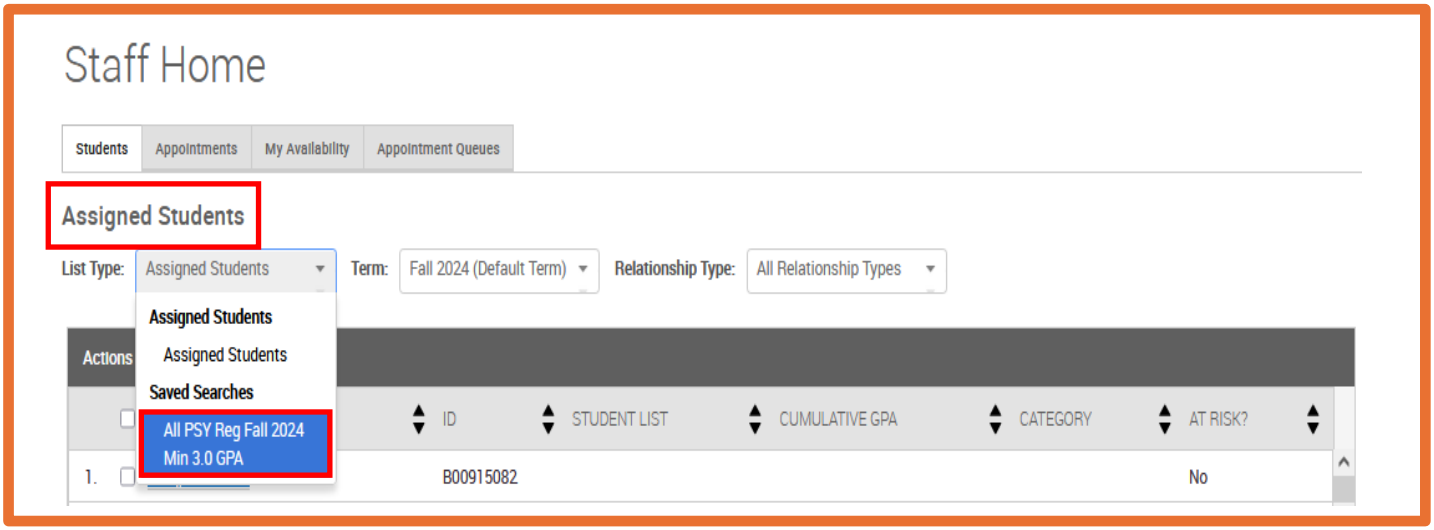
You can also find your **Saved Lists** and **Saved Searches** in the **My Assigned Students** list.



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.

The **Advanced Search** and **Saved Search** functionality in Navigate allows advisors, faculty, and administrators to layer a series of filters onto a specific query. With a nearly infinite number of possible combinations, Advanced Search helps to customize searches so that users are empowered to identify specific groups of students on campus and evaluate these students' unique needs. Some ways to use Advanced Search and Saved Advanced Searches include:

- Search to identify students that are associated with a specific group (category, tag) on campus that have completed specific milestones
- Find students that were enrolled in a past semester but are not enrolled in the current semester. These students might benefit from a second look to determine why they did not persist.
- Faculty might use Advanced Search to see students that are currently enrolled in majors within the department they oversee.
- Advisors might search for students within a GPA range so that they can run targeted advising campaigns.
- Advisors might search for students that have earned credits within a specific range to identify students who are nearing graduation to remind them about any graduation-related applications.

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