Advanced Search

Using Advanced Search Filters

Finding Students Using Advanced Filters

1. **Click Show Advanced Filters:** For basic searches, such as finding a singular student by name or UDID#, a user can utilize Advanced Search without clicking Show Advanced Filters. However, for most searches, an advisor will need to click on the top right-hand `Show Advanced Filters` before performing their search.

   □ **Term Implications:** Please note that Term selected in the top-right (e.g. Winter 2017) affects the search results.
   
   i. If the student does not have a *term record for that term*, the results will not show Classification or Category. A *term record for that term will include students in the output who were once actively-registered for that term but later withdrew (Ws) for that term. However, students who are on LOA for that term *are not* seen as having a term record for that term and are not included in the output.
   
   ii. In addition, the term affects the drop-down availabilities. For example, if there are no students active within a particular major for that term, then that major will not appear as an option within the *Area of Study* filter.
   
   iii. It is also important to remember that the data found within the platform is provided by a nightly UDSIS data feed – actions taken within UDSIS will not replicate in the platform until the following day. Some of the common features an advisor might use within Advanced Filters:

   - **Student Information:** Student information filters provide advisors with the access to search for students based on demographic criteria such as by gender, transfer background, name, etc. This is also the section to search by categories such as Athlete status, Veteran status, STEM major, etc. For example, a college might want to outreach to students within an Honors category about a new Honors colloquium offering. Categories are derived from UDSIS data and categories that exist within the platform are approved by the BHSC Leadership Team.

   - **Area of Study:** Area of study filters will be heavily utilized in order for advisors to search on criteria such as college, major and concentration. For example, advisors will likely want to filter for students based on the college and/or applicable majors with whom the advisor works. Please note that the platform will only display majors for which there are active students enrolled in for the term in which
an advisor is searching – e.g. if there are no students active within a particular major, that major will not appear as an option within the Area of Study filter.

- **Performance Data**: Performance data filters provide advisors the ability to filter based on academic performance such as finding students within certain GPA ranges or credits earned ranges, etc. For example, an advisor might want to outreach to students below a 2.4 GPA for an advising appointment. Or, a college might want to outreach to students within a 3.8-4.0 GPA range about an upcoming scholarship or research opportunity. Please note that there is an issue with High School GPA filter – the issue is being reviewed by EAB.

- **Semester Data**: Semester data filters provide advisors the ability to find students with particular term specific classifications such as finding all students classified as Seniors or Juniors within a particular term. Please note that certain Classification terms are EAB hardcoded terms and do not apply to UD, such as Adult Education, Skills or Credit.

- **Course Data**: Course data filters provide advisors with the access to search for students enrolled in a particular course for a term. For example, an advisor might want to let all students enrolled in a fall ACCT 207 course know about the ACCT 208 course being offered over winter term. Please note that there is an issue with Section filter – the issues is being reviewed by EAB.

- **Not Registered**: Not Registered – Please note that Course Data goes back to Fall 2012 – e.g. if you’re doing a search of students not registered for ENGL 110, it will return false positive results for students that have taken ENGL 110 but simply prior to Fall 2012. Therefore, when using this filter, advisors should understand the term limitations. For example, advisors might want to add a filter of Classification and only look for freshmen or sophomores that have not taken ENGL 110 as it is much more likely that those students will have taken the course in the timeframe of Fall 2012 and beyond.

- **Assigned To**: Assigned To filters provide advisors the ability to find students with a particular major advisor. Tutor and Coach assignment functionality is not currently built within the platform.

- **Success Indicators**: Success Indicator filters provide advisors with the access to filter for students within certain predicted risk levels (based on the EAB proprietary risk model) or by Success Markers. Please note that risk level verbiage has been customized at UD to Recommended Advisor Intervention. Not every major will have Success Markers within the platform. This functionality is evolving and therefore advisors may not want to solely rely on Success Indicator filters for search criteria/action with students.

- **My Students Only**: This feature gives advisors the ability to apply search criteria to their assigned advisee list only. For example, an advisor might want to outreach to only their assigned advisees who are freshmen and sophomores with a GPA below a 2.4.

- **Include Inactive**: The Include Inactive feature provides advisors the ability to search for students that were once in the nightly files (since the SSC initiative began in Fall 2016) but are no longer actively enrolled at UD. However, typically, advisors are going to search for students that are still active at the university.

- **Students on LOA** – The Advanced Search functionality is based off of students who are registered; UDSIS data where a student has N = Not Registered will not return in the search results. Therefore, students can be technically active but not registered (LOA) and in those cases, they will not return in the Advanced Search output results.

**Modifying Results within Advanced Search**

2. **Modifying a Search**: Once a user has performed a search, they can modify that search if they desire. For example, an advisor might to a search based on a GPA range between .1-3.0 and determine there are too many students within the results. The advisor could then click on the Modify Search link in order to return to Advanced Search and adjust the GPA range to .1-2.7. A user can also adjust the search criteria by clicking the “X” next to a particular search criterion at the top of the search results.
Saving Search Results within Advanced Search

3. **Saving a Search:** If a user desires to return to a search based on the criteria entered, they must save the search. A saved search dynamically updates. For example, if an advisor creates a search based on Biological Sciences majors with a 3.0-4.0 GPA and a student’s GPA falls out of that range or they change their major, the student will no longer appear on that saved search list.

Please see screenshot below regarding the Modify Search and Save Search functions.