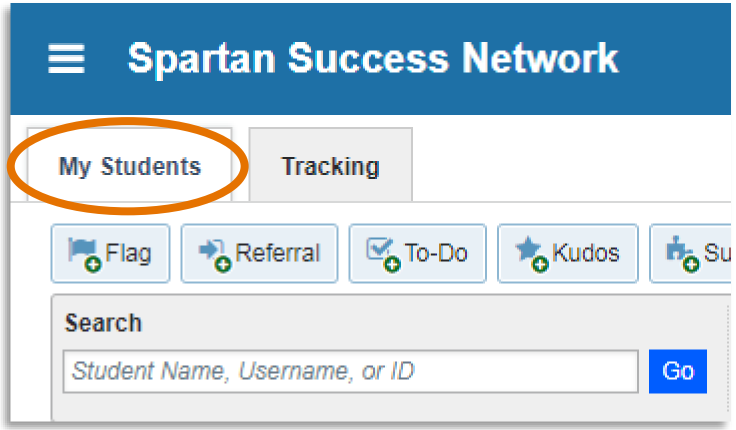
Filtering Student Rosters in Spartan Success Network

Filtering Approaches*

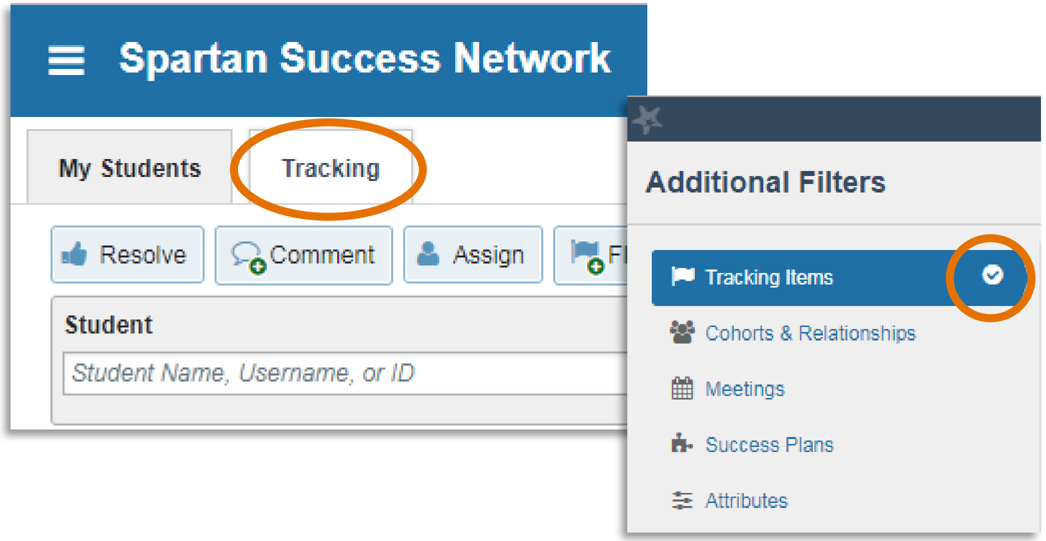
Student-Based

- No default filters
- May begin with largest possible population



Tracking Item-Based

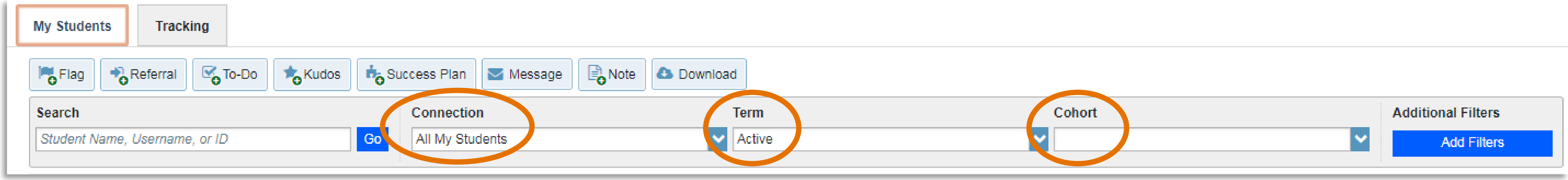
- Default filter: students who have any type of active Tracking Item: Flag, Kudos, Referral, or To-Do



*The students you have access to depends on your term-based role(s) and relationship(s)

Before Diving In…

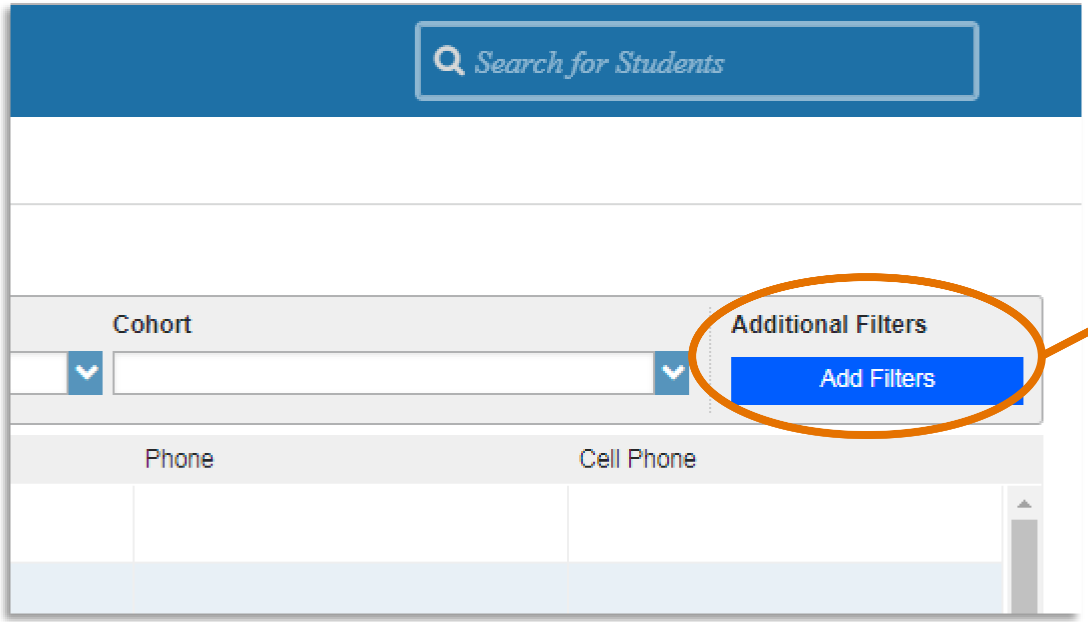
- Be mindful of Connection, Term, and Cohort menu settings
  - They can be a common reason for unexpected results

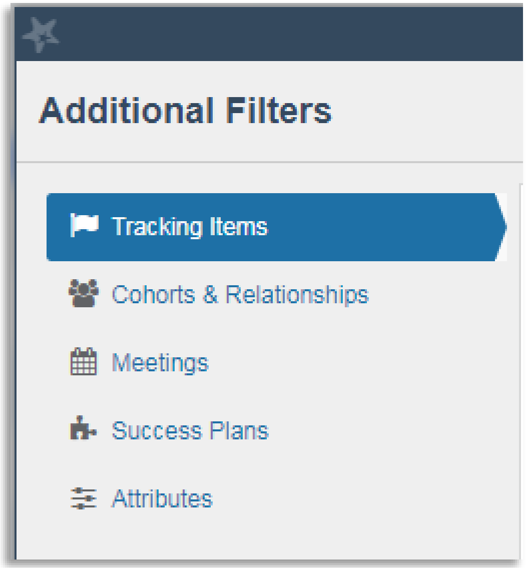


  - Active vs. All Terms
    - Active: includes terms in which the student is registered (in progress and future)
    - All: includes past, current, and future terms during which the student is registered
  - Cohorts
    - What you have access to depends on your role(s)

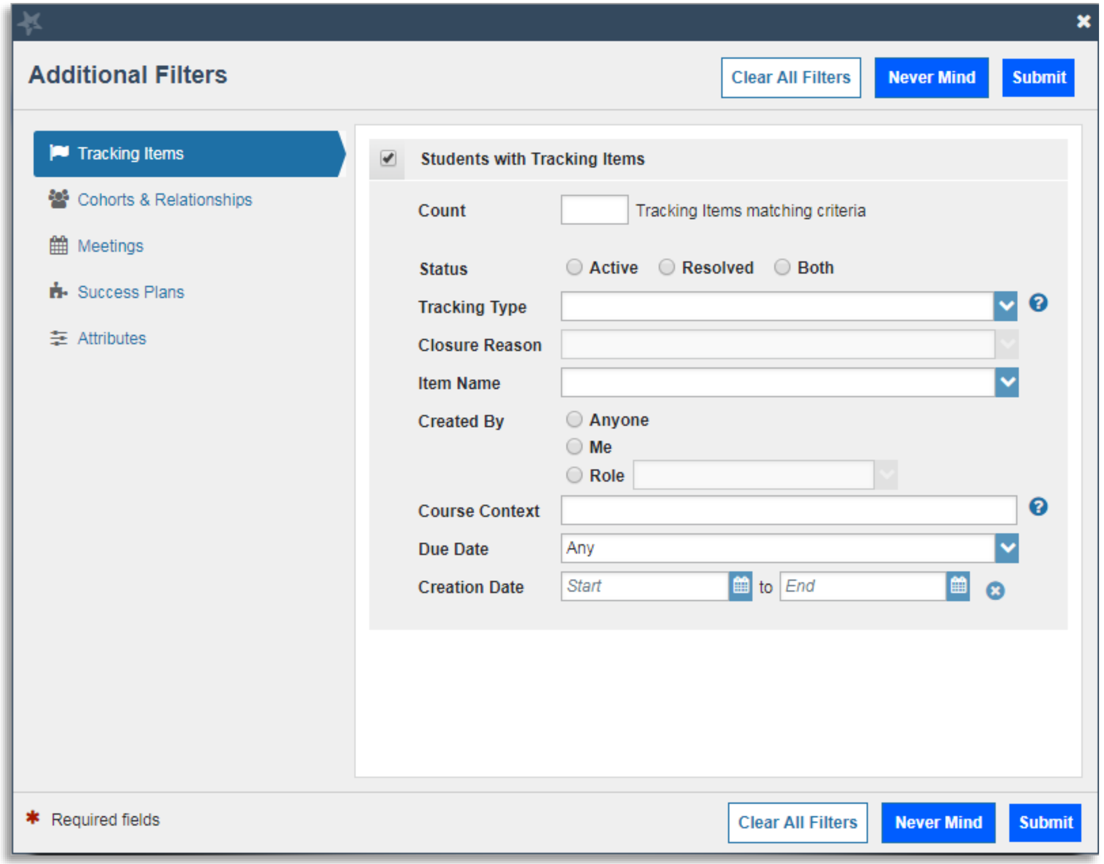
Adding Filters

Clicking on "Add Filters" opens a new window containing a menu of filtering options



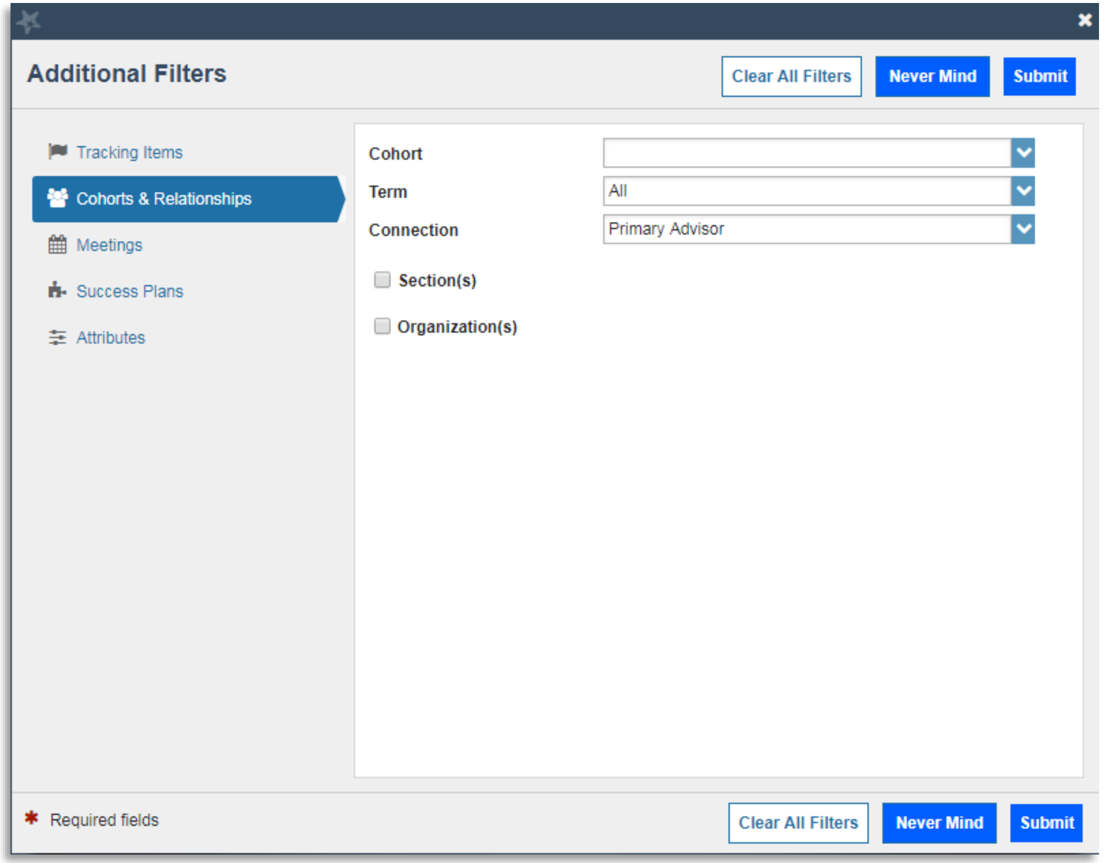


Tracking Items: Special Notes



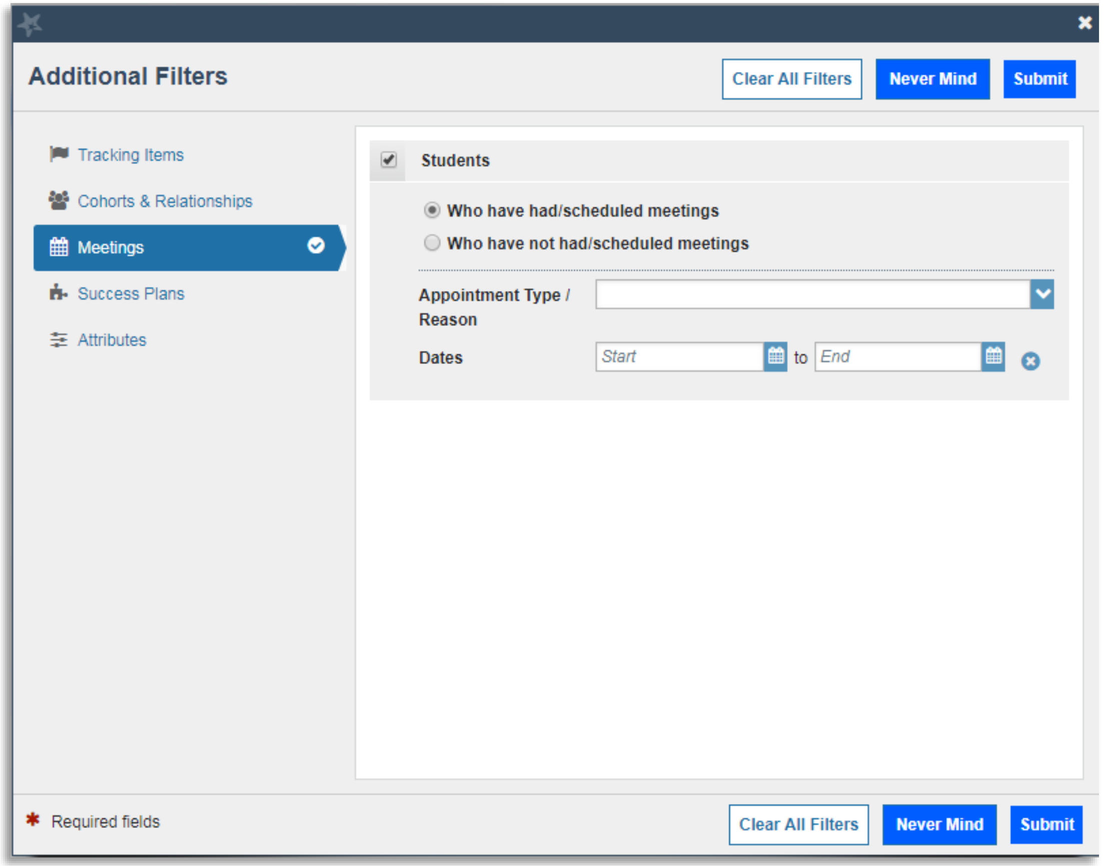
- **Count:** search for students with tracking items greater than or equal to the number you specify
  - Available only when filtering in the My Students tab

Cohorts & Relationships: Special Notes



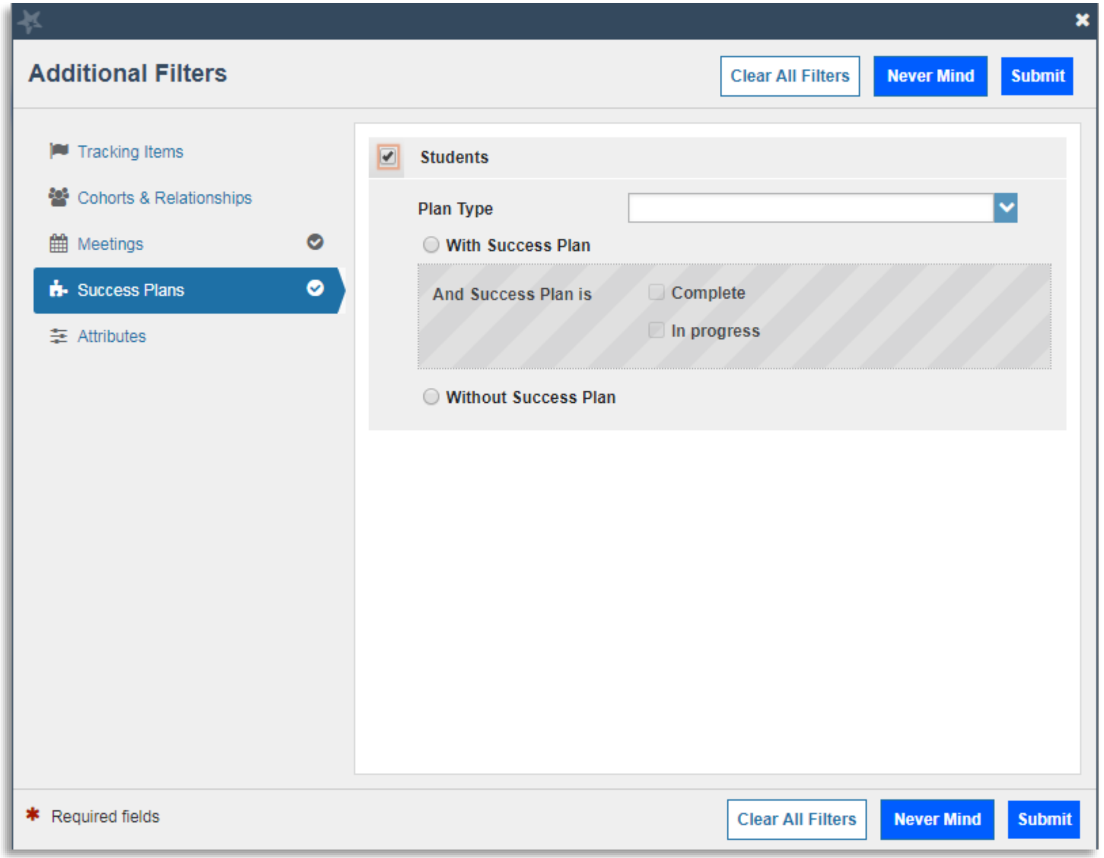
- **Cohort, Term, and Connection:** alternative but equivalent to the drop-down menus in the previous window
- **Section(s)** = course sections
  - Must search course title (not course prefix) as shown on Schedule of Classes
  - Returns 25 results at a time
- **Organization(s)** = athletic teams

Meetings: Special Notes



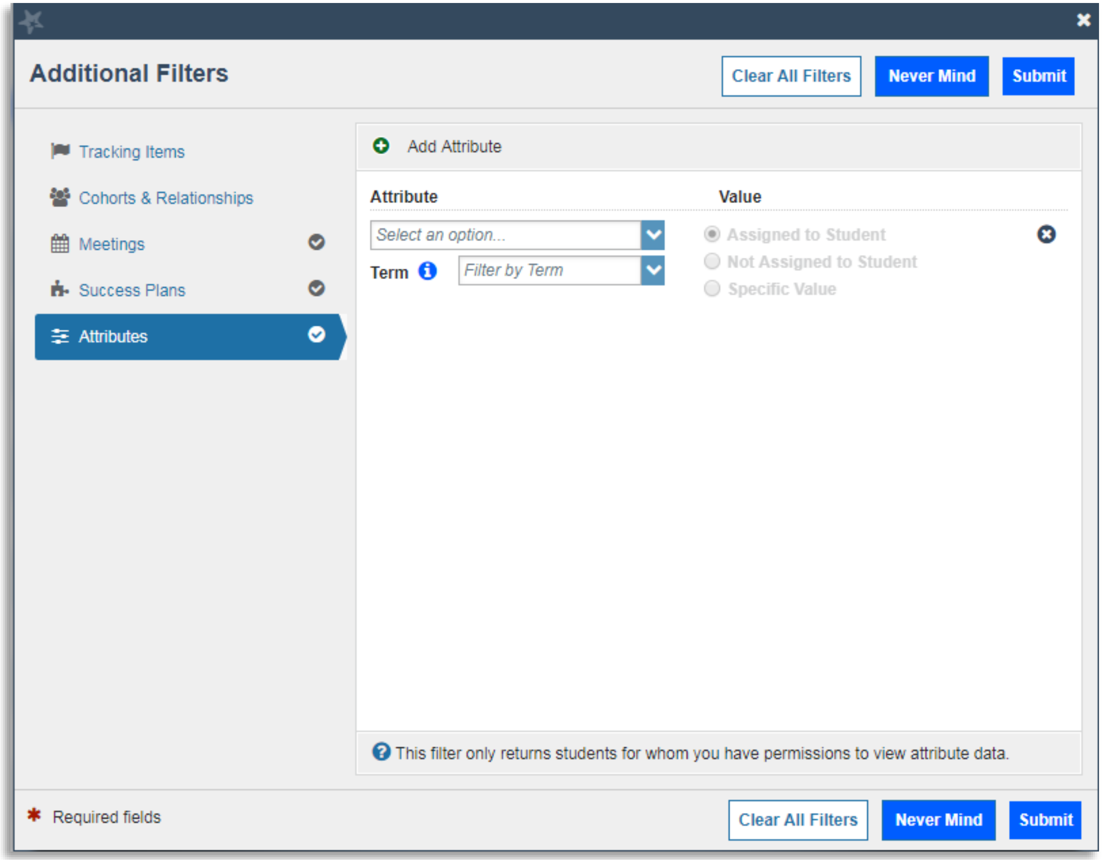
- A potentially useful feature to quickly determine which students need to make an appointment and, subsequently, send them a reminder

Success Plans: Special Notes



- Success Plans are not yet enabled in the system—stay tuned!

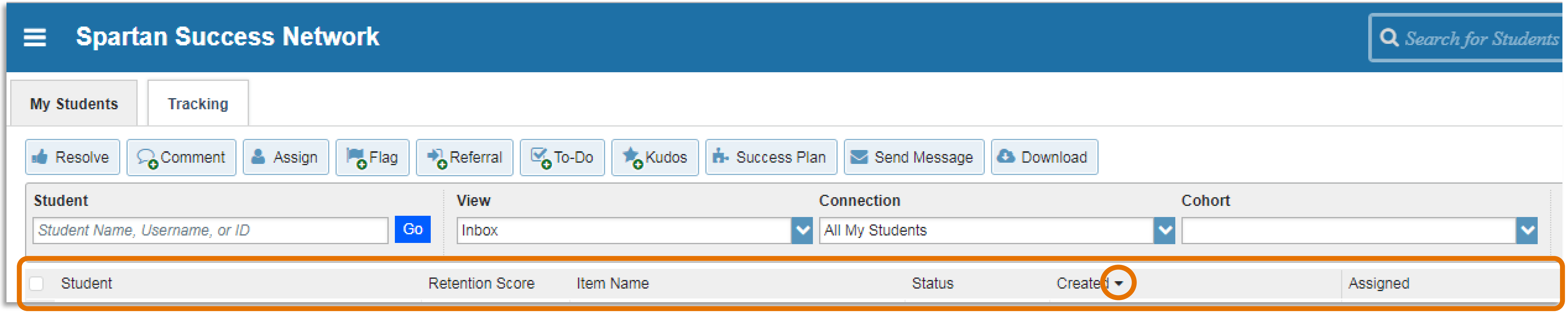
Attributes: Special Notes



- Adding multiple Attributes will filter via the Boolean operator of AND
- **Assigned to Student** = present in the student folder
- **Not Assigned to Student** = absent from the student folder
- **Specific Value** often yields one or more drop-down menus
  - Text boxes allow the use of an asterisk (*) wild card
    - Ex: Latest Degree: *sought*/*awarded*

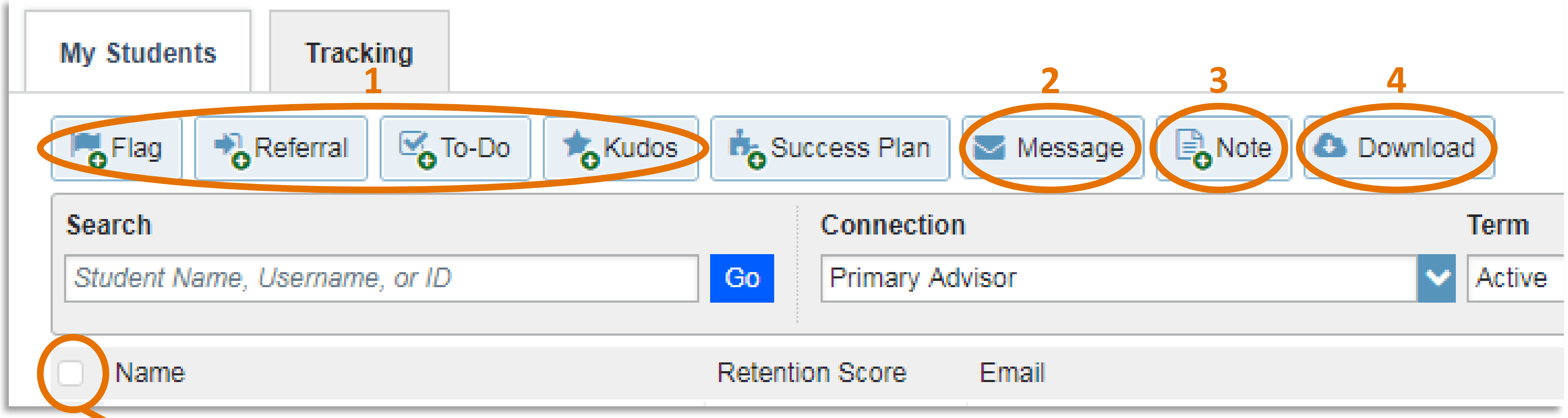
Possible Next Steps with Filtered Rosters

- Click on a column label to sort the roster by that column (alphabetically, chronologically, etc.)
  - A triangle will appear next to the column that has been used for sorting
  - Click on the column again to reverse the order (e.g., from A-Z to Z-A)



Possible Next Steps with Filtered Rosters:
My Students Tab

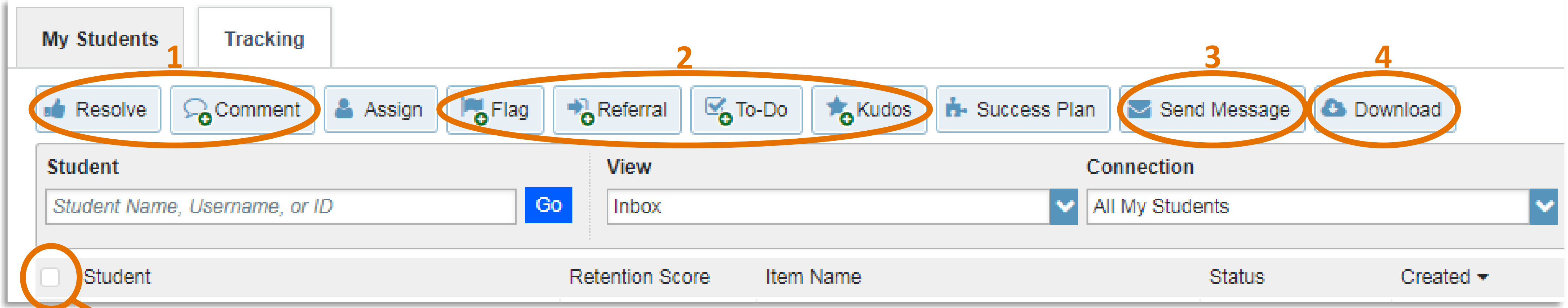
- Initiate Tracking Items (1), a Message (2), and/or a Note (3) in “bulk”
  - Ensure comments are generic enough to apply to all the selected students
  - The system will record whether or not each student opened the Message in the Notes section of the student folder
- Download (4) the filtered roster into an Excel file



Check this box to select all students on the roster (one page at a time)

Possible Next Steps with Filtered Rosters: **Tracking Tab**

- Resolve or Comment (1) on Tracking Items, initiate additional Tracking Items (2), or Send Message (3) in “bulk”
  - Ensure comments are generic enough to apply to all the selected students
  - Students whose name appears multiple times in the roster (due to multiple Tracking Items) will receive a separate email for <u>each</u> item
- Download (4) the filtered roster into an Excel file



Check this box to select <u>all</u> students on the roster (one page at a time)