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 a 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 entire roster (across pages)
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 each item

- Download (4) the filtered roster into an Excel file

Check this box to select all students on the entire roster (across pages)