

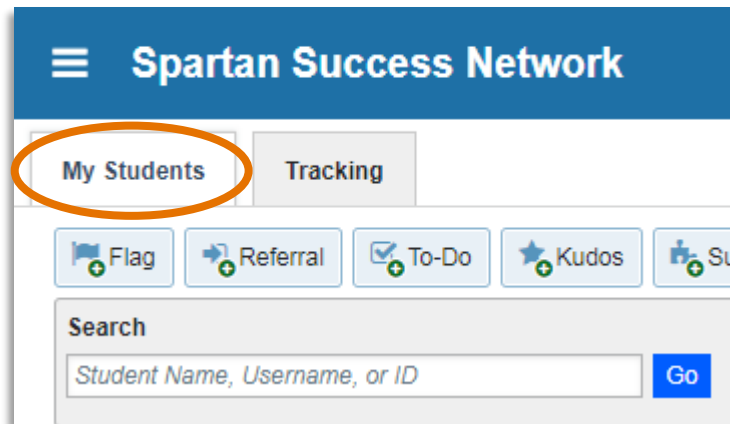
Filtering Student Rosters in Spartan Success Network



Filtering Approaches*

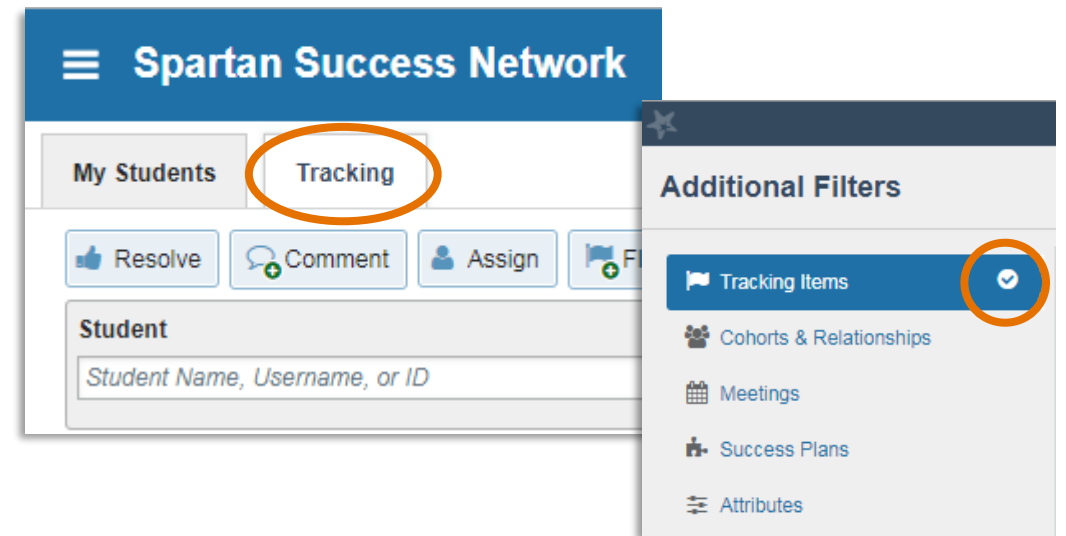
Student-Based

- No default filters
- May begin with largest possible population



Tracking Item-Based

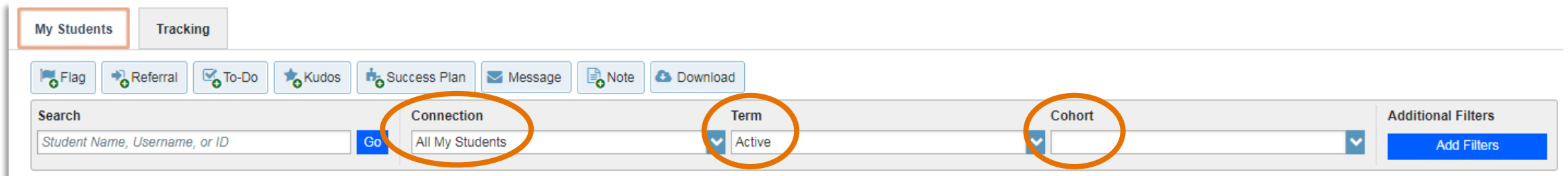
- Default filter: students who have any type of active Tracking Item: Flag, Kudos, Referral, or To-Do



*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

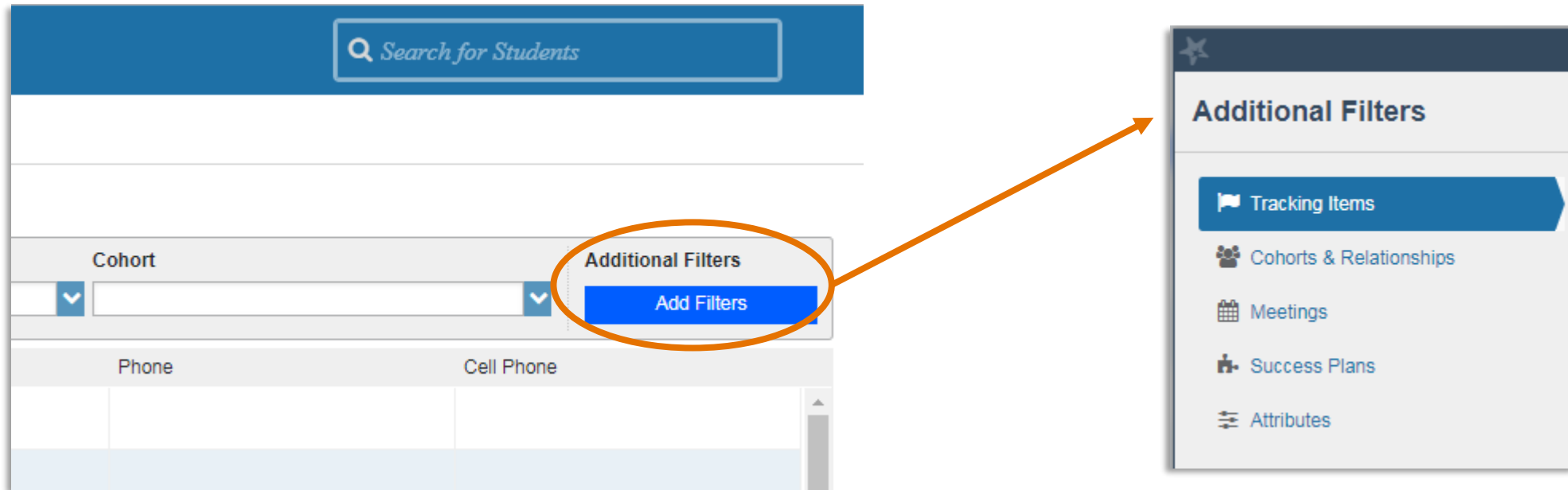


The screenshot shows a user interface for managing students. At the top, there are two tabs: "My Students" (highlighted with an orange box) and "Tracking". Below the tabs is a row of action buttons: "Flag", "Referral", "To-Do", "Kudos", "Success Plan", "Message", "Note", and "Download". Below the buttons is a search bar with the placeholder text "Student Name, Username, or ID" and a "Go" button. To the right of the search bar are three filter dropdown menus: "Connection" (set to "All My Students", highlighted with an orange circle), "Term" (set to "Active", highlighted with an orange circle), and "Cohort" (empty, highlighted with an orange circle). To the right of these filters is an "Additional Filters" section with an "Add Filters" button.

- 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

The screenshot shows a software interface for filtering students based on tracking items. The dialog is titled 'Additional Filters' and has a close button (X) in the top right corner. On the left, there is a sidebar with navigation options: 'Tracking Items' (selected), 'Cohorts & Relationships', 'Meetings', 'Success Plans', and 'Attributes'. The main area is titled 'Students with Tracking Items' and contains the following fields:

- Count:** A text input field with the placeholder text 'Tracking Items matching criteria'.
- Status:** Radio buttons for 'Active', 'Resolved', and 'Both'.
- Tracking Type:** A dropdown menu with a question mark icon.
- Closure Reason:** A dropdown menu.
- Item Name:** A dropdown menu.
- Created By:** Radio buttons for 'Anyone', 'Me', and 'Role' (with a dropdown menu).
- Course Context:** A text input field with a question mark icon.
- Due Date:** A dropdown menu with 'Any' selected.
- Creation Date:** A date range selector with 'Start' and 'End' fields, a 'to' separator, and a close button (X).

At the bottom of the dialog, there is a legend for required fields (marked with a red asterisk) and three buttons: 'Clear All Filters', 'Never Mind', and 'Submit'.

- **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

Additional Filters

Clear All Filters Never Mind Submit

Tracking Items

Cohorts & Relationships

Meetings

Success Plans

Attributes

Cohort

Term All

Connection Primary Advisor

Section(s)

Organization(s)

* Required fields

Clear All Filters Never Mind Submit

- **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

The screenshot shows a web application window titled "Additional Filters" with a close button (x) in the top right corner. On the left side, there is a navigation menu with the following items: "Tracking Items", "Cohorts & Relationships", "Meetings" (which is highlighted with a blue bar and a checkmark), "Success Plans", and "Attributes". The main content area is titled "Students" and contains the following elements:

- A checked checkbox next to the "Students" header.
- Two radio button options: "Who have had/scheduled meetings" (selected) and "Who have not had/scheduled meetings".
- A dropdown menu labeled "Appointment Type / Reason".
- A date range selector labeled "Dates" with input fields for "Start" and "End", each with a calendar icon, and a "to" separator between them.

At the bottom of the window, there is a legend indicating that a red asterisk (*) denotes "Required fields". To the right of the legend are three buttons: "Clear All Filters", "Never Mind", and "Submit".

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

Success Plans: Special Notes

The screenshot shows a software interface for filtering data. On the left, a sidebar lists categories: Tracking Items, Cohorts & Relationships, Meetings, Success Plans (highlighted), and Attributes. The main area is titled 'Additional Filters' and contains a 'Students' filter section. This section has a 'Plan Type' dropdown menu and three radio button options: 'With Success Plan', 'And Success Plan is' (with sub-options 'Complete' and 'In progress'), and 'Without Success Plan'. The 'And Success Plan is' section is shaded with diagonal lines, indicating it is disabled. At the bottom of the dialog, there are buttons for 'Clear All Filters', 'Never Mind', and 'Submit'. A legend at the bottom left indicates that a red asterisk (*) denotes required fields.

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

Attributes: Special Notes

The screenshot shows a software interface titled "Additional Filters" with a sidebar on the left containing navigation options: Tracking Items, Cohorts & Relationships, Meetings, Success Plans, and Attributes (which is selected). The main area is titled "Add Attribute" and contains two columns: "Attribute" and "Value". The "Attribute" column has a dropdown menu with "Select an option..." and a "Term" dropdown with "Filter by Term". The "Value" column has three radio button options: "Assigned to Student" (selected), "Not Assigned to Student", and "Specific Value". At the bottom of the main area, there is a note: "This filter only returns students for whom you have permissions to view attribute data." The interface includes "Clear All Filters", "Never Mind", and "Submit" buttons at the top and bottom.

- 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*

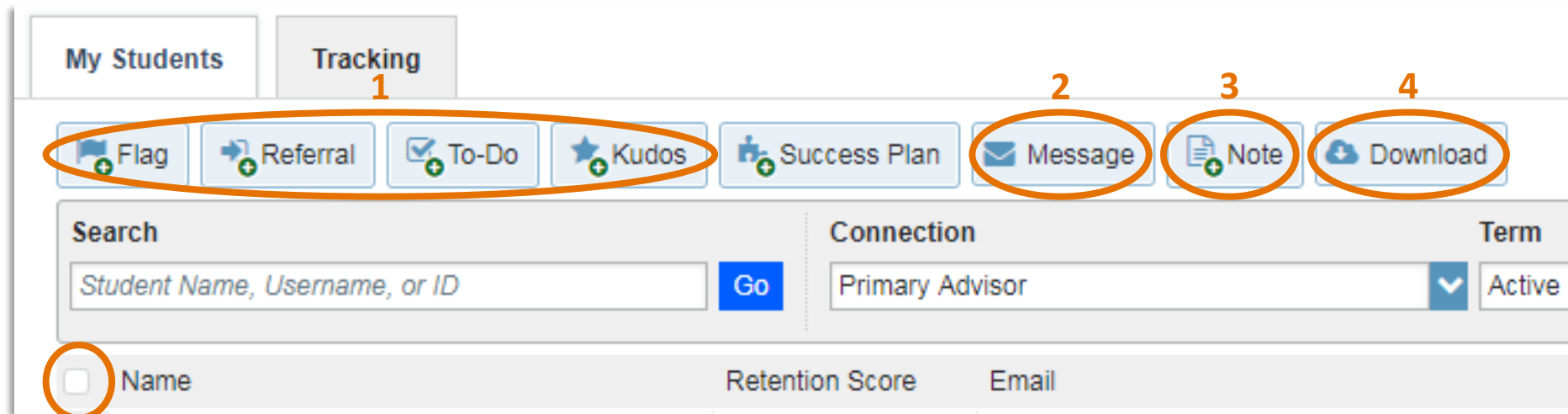
Possible Next Steps with Filtered Rosters

- 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)

The screenshot displays the Spartan Success Network interface. At the top, there is a blue header with the text "Spartan Success Network" and a search bar on the right labeled "Search for Students". Below the header, there are two tabs: "My Students" and "Tracking". A row of action buttons includes "Resolve", "Comment", "Assign", "Flag", "Referral", "To-Do", "Kudos", "Success Plan", "Send Message", and "Download". Below these buttons, there are filters for "Student" (with a search input and "Go" button), "View" (set to "Inbox"), "Connection" (set to "All My Students"), and "Cohort". At the bottom, a table header is visible with columns: "Student", "Retention Score", "Item Name", "Status", "Created", and "Assigned". The "Created" column header has a small downward-pointing triangle next to it, indicating it is the current sort order. An orange box highlights the "Created" column header.

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

The screenshot shows the 'Tracking' tab interface. At the top, there are two tabs: 'My Students' (labeled 1) and 'Tracking'. Below the tabs is a horizontal toolbar with several action buttons: 'Resolve' (labeled 1), 'Comment' (labeled 1), 'Assign', 'Flag' (labeled 2), 'Referral' (labeled 2), 'To-Do', 'Kudos', 'Success Plan', 'Send Message' (labeled 3), and 'Download' (labeled 4). Below the toolbar is a search bar for 'Student' with a 'Go' button, and dropdown menus for 'View' (set to 'Inbox') and 'Connection' (set to 'All My Students'). At the bottom, a table header is visible with columns: 'Student' (with a checkbox), 'Retention Score', 'Item Name', 'Status', and 'Created'. An orange circle highlights the checkbox in the 'Student' column, with an arrow pointing to it.

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