

A Note about Advanced Search: Advanced search provides those with **Advisor** roles to retrieve a list of students based on a number of parameters that refine the characteristics for which you are searching. This feature is limited in scope by design.

Step 1: Enter the Advanced Search screen within Navigate Staff.

- Click on **Advanced Search** icon from the left-hand menu to search any user by different available options.
- The icon resembles a magnifying glass with a plus sign inside.

Step 2: Use Keywords and Type Fields to Find a Single Student by ID or Name.

- Click on **Advanced Search** icon from the left-hand menu to search any user by different available options. The icon resembles a magnifying glass with a plus sign inside.
- The top of the Advanced Search fields displays **Keywords** and **Type**. These can be used as a quick search without additional filtering.
- Type a student's ID beginning with either a z or a zero into the **Keyword** search field.
- Scroll to the bottom of the search screen and press the **Search** button.
- A result should display the name of the student associated with the ID you typed.
- You also can find students with the same or similar last names by typing the first several letters of a last name into the Keyword search field.

Step 3: Actions from the Search Screen.

- From the search results, you can take a series of actions right from the listing:
 - Modify Search:** Adjust the search terms.
 - Actions:**
 - Add students to a list
 - Message students
 - Create an Appointment Summary
 - Create campaigns
 - Issue an alert
 - Type notes about the student
- Check the square next to each student to apply the action from the search results.
- To select all students, click the **Select all # items** link from the top of the search results table.
- There are two additional options you can select to filter a search further:
 - Include Inactive** students in the search.
 - Show **My students only**.

Note: You will need to press the **Search** button after selecting those two check boxes to apply the filter.

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Step 4: Use the Advanced Search screen within Navigate Staff.

- Below the Keywords and Type section, are a series of expandable rows that will reveal additional filter fields when you click on the grey bar.
- The filters containing various characteristics that you can use to identify cohorts of students based on specific characteristics.
 - **Student Information:** Includes searching by **Student Lists, Tags, Categories**, and transfer status.
 - **Enrollment History:** Identify students who are enrolled or not enrolled in one or more terms.
 - **Area of Study:** Identify students within college(s), major(s), concentrations, or degrees.
 - **Term Data:** Includes filters for minimum or maximum credit hours, classification (year-in-class).
 - **Performance Data:** Includes filters for GPA, hours, and credits overall (not just for the current term).
 - **Course Data:** Identify students by course(s) in which they are enrolled by term.
 - **Assigned To:** Identify students assigned to specific staff by name or, role.
 - **Success Indicators:** Identify students by specific success markers or by number of missed markers.

Note: There are several fields containing a (+) icon. Click this icon to expands to show additional fields for conditional searching (e.g., **In All of these** or **In None of these**) to search for students who do not meet those conditions.

Step 5: Save a Search.

You can save a search in Navigate to re-run the filters to provide a refreshed search result.

Note: Saved search saves the filters, which will run each time you access the search providing updated results. If you need to preserve the results, save as a **Student List** instead (see Step 3).

- To save the search, click the Save button located next to the words **Unsaved Student Search** near the top of the page.
- Typing a name for your search in the **Name** field in the pop-up box.
- Press the **Save Search** button.

Step 6: Access a Saved Search.

- Your saved search will appear in **Lists and Saved Items** section of Navigate Staff.
- Click on the bulleted lines icon from the left-hand navigation menu.
- Click on the name of the search to open and rerun the search. The search results will reflect student data currently in the system (since the last data refresh).

Example: Brandon ran a report of enrolled students on Monday and had 147 students in the results. On Wednesday, he accesses the saved search and the filters refresh the results, which now shows 208 results.

If you need additional assistance or have questions about the information in this guide, please contact us at Navigate@niu.edu.

