

4. Saved Searches



Feature Overview

Saved searches lets users run a pre-configured Advanced Search without having to create the search again. Unlike Student Lists, which save a static list of the same students, a saved search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters

Create a saved search in **Advanced Search**. After selecting your search parameters and running the search, click the **Save** button.

- 1 Navigate to <https://csus.campus-training2.eab.com/users/lists>

2

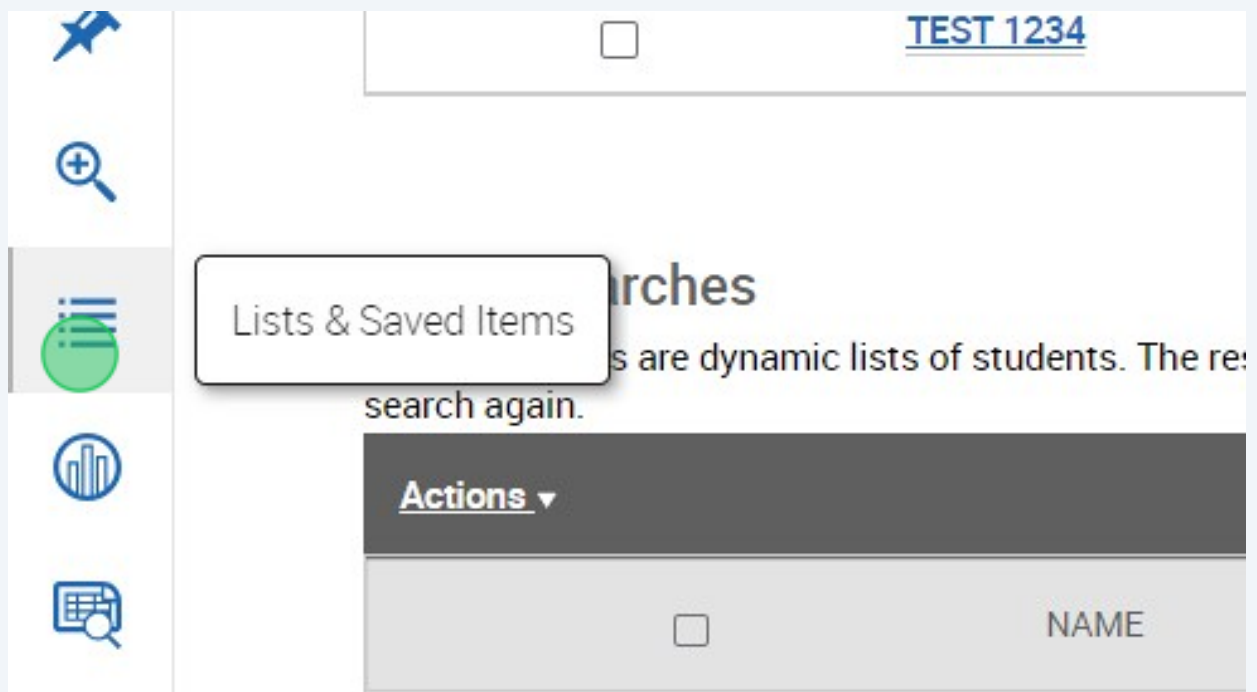
A saved search generates a list of the students that meet your search parameters at this time. It does not save the list of students themselves. To create a static list of students to track, you need a Student List.

Saved searches are accessible in several places in Navigate Staff.

1. **Staff Home Page.** Clicking **My Assigned Students** on the Staff Home page pulls up not only lists of your assigned students by term, but also any saved searches or student lists you created.

2. **Lists and Saved Items.** This page aggregates all your student lists and saved searches and reports. You can also create a new saved search on this page by clicking the **New Saved Search** button, which directs you to Advanced Search.

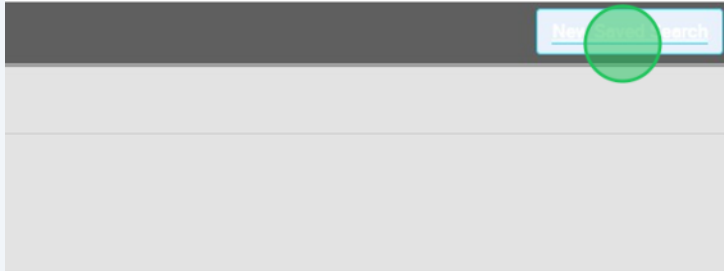
Click Advanced Search or Lists & Saved Items



3 Click "New Saved Search"

2
11

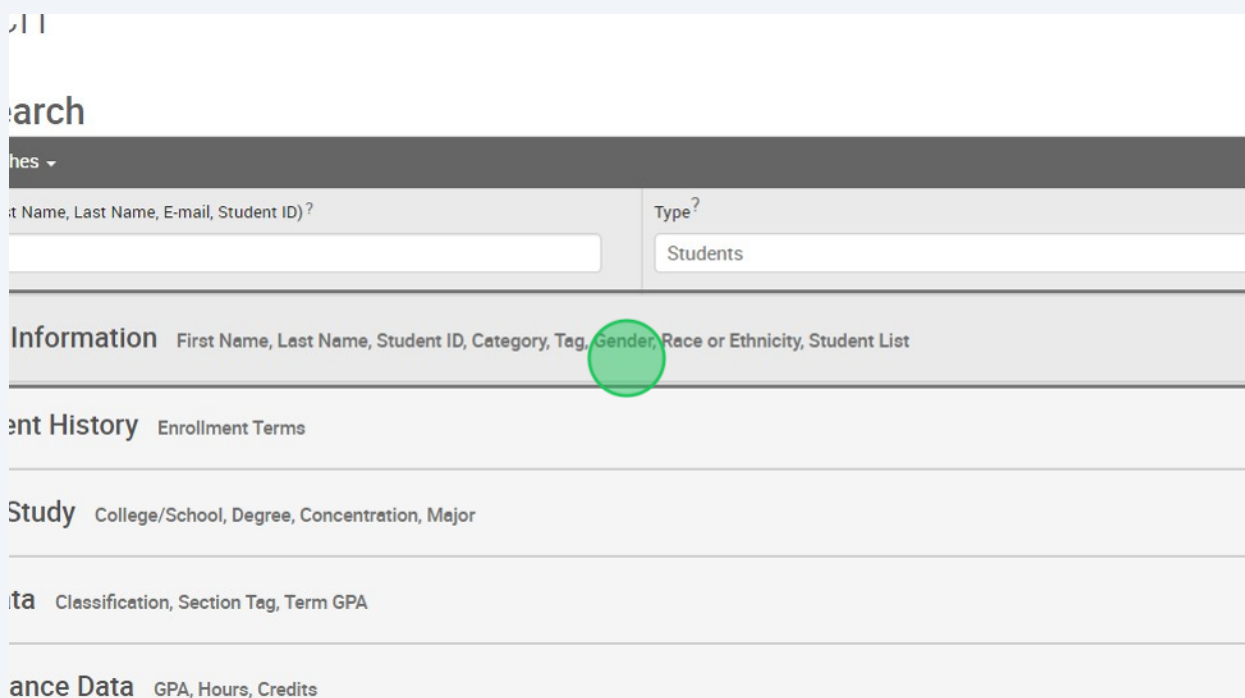
ed Searches to run a pre-configured Advanced Search without having to create the



4 **Note: Advanced Search.** Any saved search is accessible on the **Advanced Search** page.

Example: Saving a list of Transfer Students

Click "Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List"



5 Click "Any"

To Last Name?		Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>
		Transfer Student
<input type="text"/>		Any

6 Click here.

To Last Name?		Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>
		Transfer Student
<input type="text"/>		Any
		Yes
		No

7 Click this button field.

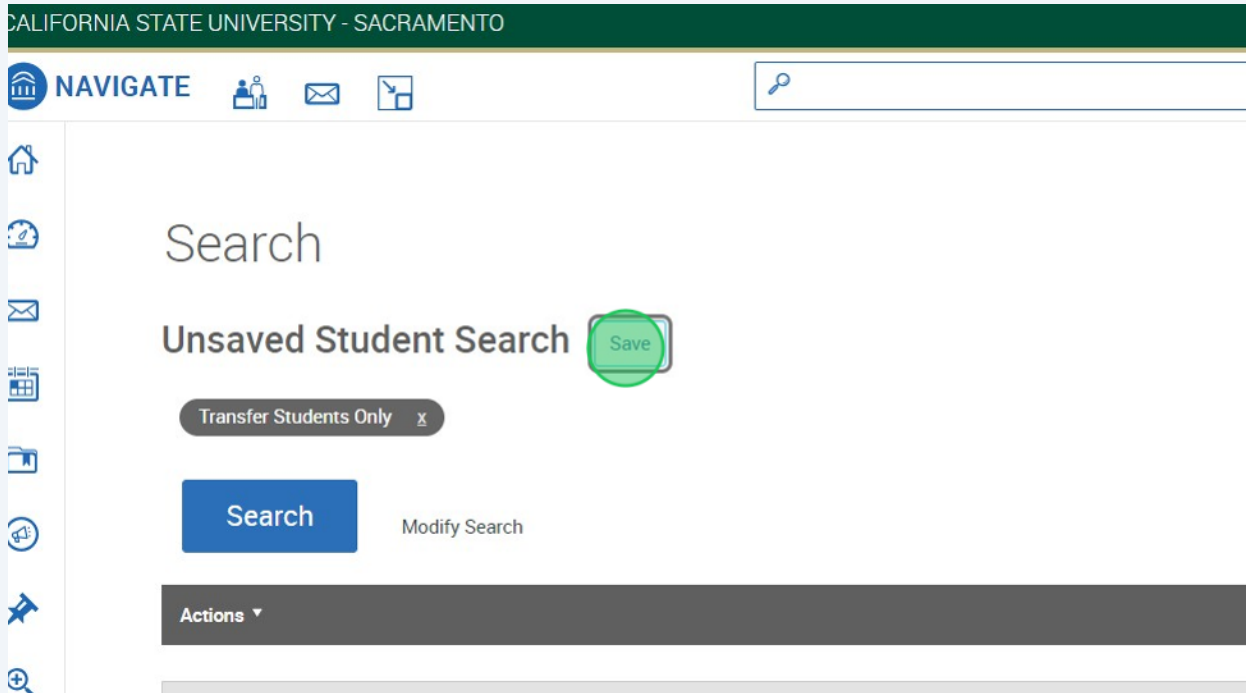
The screenshot shows a search interface with three filter categories: "Performance Data" (GPA, Hours, Credits), "Course Data" (Course, Section, Status), and "Assigned To". Below these filters is a "Search" button, which is highlighted with a green circle. To the right of the button are three checkboxes: "Include Inactive", "My Students Only", and "At-Risk Students Only".

8 Click a check box or click the check box near "NAME" to select all

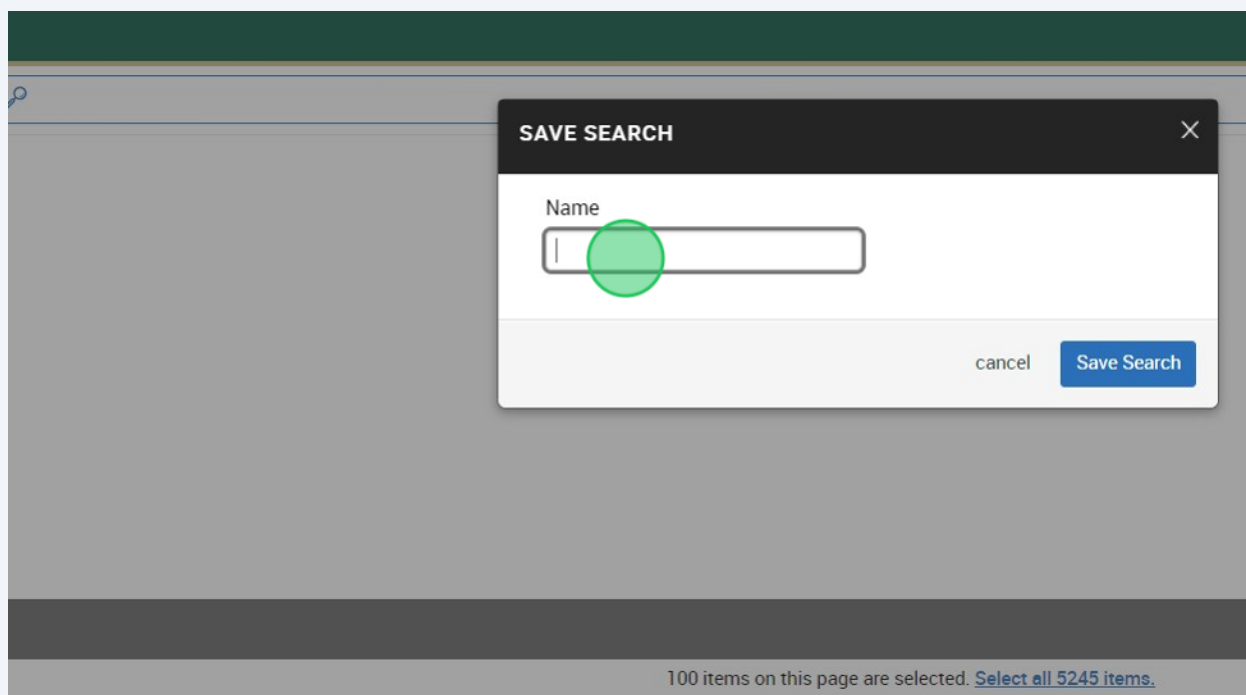
The screenshot shows a search interface with a "Transfer Students Only" filter, a "Search" button, and a "Modify Search" link. Below the search controls is a table with a header row and four data rows. The header row has a "NAME" column with a checkbox, and columns for "STUDENT ID", "STUDENT LIST", "CUMULATIVE GPA", and "M". The data rows are numbered 1 through 4. The checkbox in the header row is highlighted with a green circle.

	<input type="checkbox"/>	NAME	STUDENT ID	STUDENT LIST	CUMULATIVE GPA	M
1.	<input type="checkbox"/>					A
2.	<input type="checkbox"/>					D
3.	<input type="checkbox"/>					K
4.	<input type="checkbox"/>					B

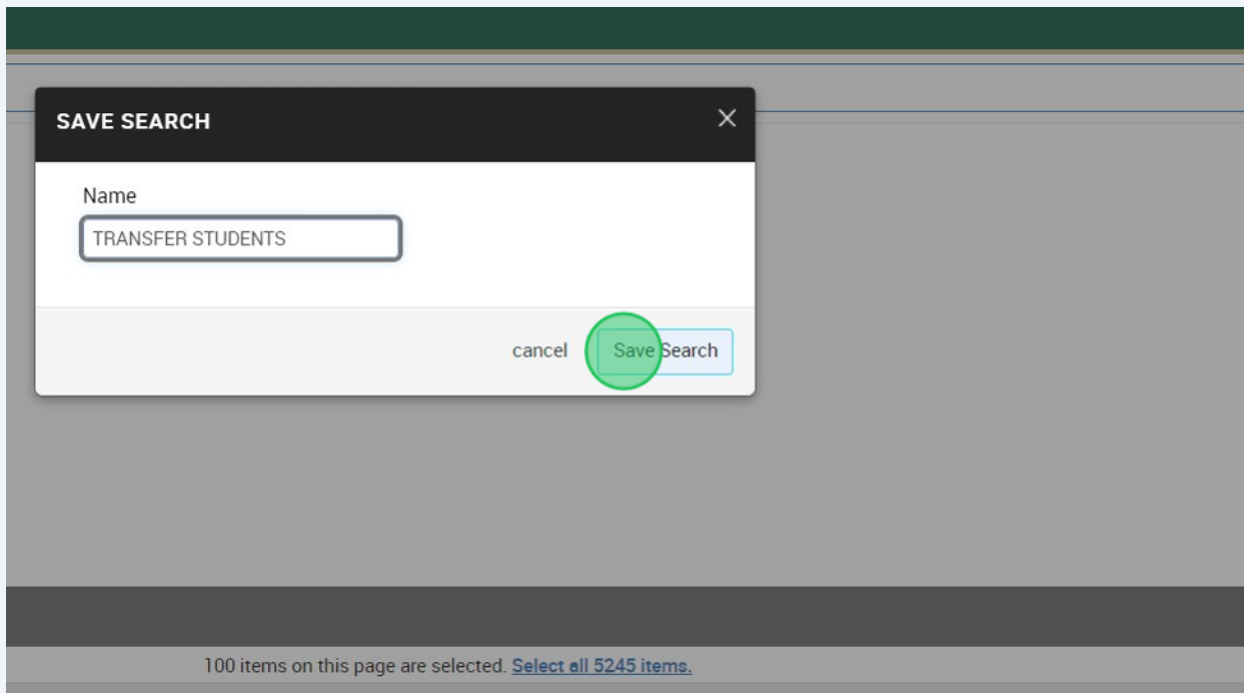
9 Click "Save"



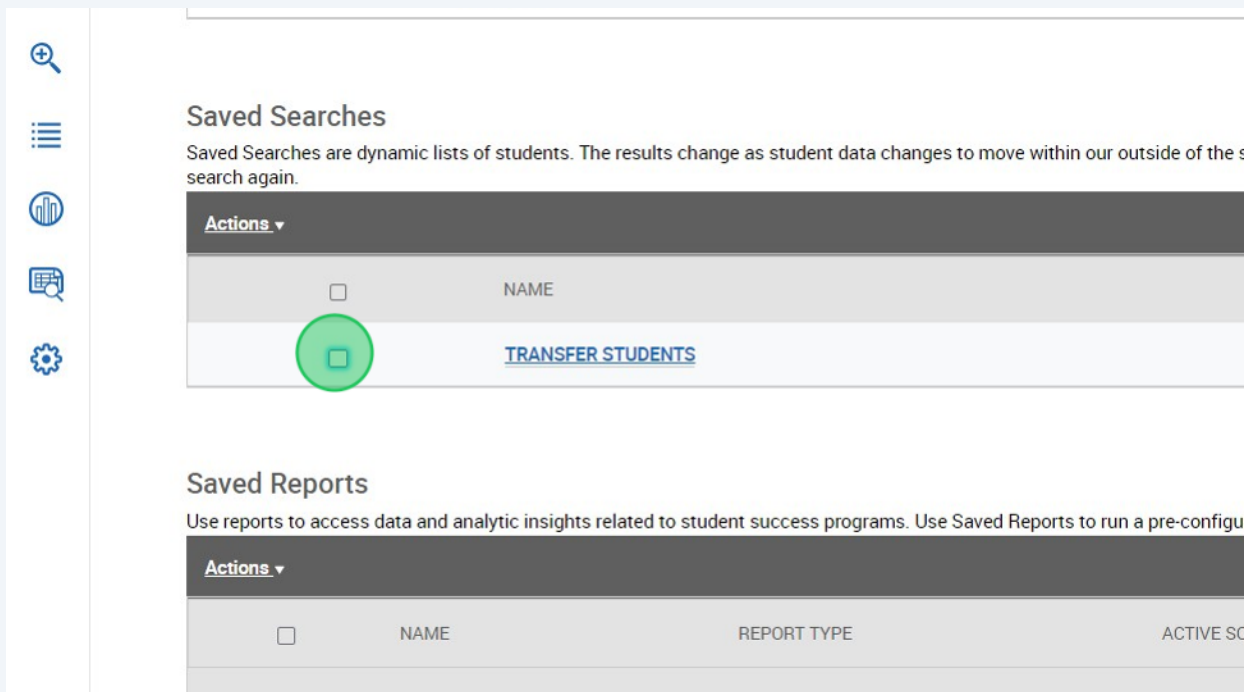
10 Click this text field to name the Save Search



11 Click this button field to Save Search



12 Click the "Select row of TRANSFER STUDENTS" field.



13 To review saved searches click List and Saved Items or Advanced Search

The screenshot shows a sidebar on the left with icons for home, pushpin, search, list, bar chart, chat, and settings. The main content area features a table with two rows:

<input type="checkbox"/>	TEST 2	Yes
<input type="checkbox"/>	TEST 1234	Yes

Below the table is a section titled "Saved Searches" with the text: "Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search again." Below this text is a table with two rows:

<input checked="" type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	TRANSFER STUDENTS

Below this table is a section titled "Saved Reports" with the text: "Use reports to access data and analytic insights related to student success programs. Use Saved Reports to run a pre-configured report." Below this text is a table with two rows:

<input checked="" type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	TRANSFER STUDENTS

14 Click "Actions" to delete if needed

This screenshot is identical to the previous one, but the "Actions" dropdown menu for the "TRANSFER STUDENTS" search is open, showing a "Delete" option. A green circle highlights the "Actions" button, and a white box highlights the "Delete" option.

15

Saved searches let you take action on students flagged once you've run the search and results are available.



Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search again.

Actions ▾	
<input checked="" type="checkbox"/>	NAME
<input checked="" type="checkbox"/>	TRANSFER STUDENTS

Saved Reports

Use reports to access data and analytic insights related to student success programs. Use Saved Reports to run a pre-configured report.

Actions ▾			
<input type="checkbox"/>	NAME	REPORT TYPE	ACTIVE SC

16

Click this checkbox.



TRANSFER STUDENTS

Rename

Delete Saved Search

Transfer Students Only x

Search

Modify Search

Actions ▾					
<input type="checkbox"/>	NAME	STUDENT ID	STUDENT LIST	CUMULATIVE GPA	MAJOR
1.	<input type="checkbox"/> Abad, Alexiss	201296268		3.35	Arts and Letters (f
2.	<input type="checkbox"/> Abadin, Z	219256805		3.68	DEFAULT
3.	<input type="checkbox"/> Abbas, James	220127194		2.90	Kinesiology (PE) E
4.	<input type="checkbox"/> Abbett, Jacob	219988588		3.22	Business (Accoun
5.	<input type="checkbox"/> Abbott, Donna	210359914		2.53	Social Work (Pre)

17 Click "Actions" to view more options to

Send Message

Opens a **Send a Message** dialog that lets you to send an email or text message (with or without an attachment) to the selected students.

Appointment Campaign

Creates an appointment campaign for the identified students.

Schedule Appointment

Opens the **Schedule Appointment** page so that users can then schedule appointments for the student. Note that if multiple students are selected, the appointment is set up as a group appointment.

Tag

Allows users to select tags to add to the student's profile. You *cannot* create new tags this way.

Note

Adds a note to the student's profile.

Mass Print

Enables users to mass print Custom Student Reports and Student Calendars from the search results.

Issue Alert

Opens the Issue Alert dialog box and marks a student at-risk.

Charity/Study Hall

Records Study Hall time to a student's profile.

Add to Student List

Adds students to a Student List.

Export Results

Generates a CSV file of the saved search results.



TRANSFER STUDENTS

Rename

Delete Saved Search

Transfer Students Only

Search

Modify Search

Actions

<input checked="" type="checkbox"/>	NAME	STUDENT ID	STUDENT LIST	CUMULATIVE GPA	MAJOR
1. <input checked="" type="checkbox"/>	Abad, Alexis	201296268		3.35	Arts and Letters (t
2. <input checked="" type="checkbox"/>	Abadin, Z	219256805		3.68	DEFAULT
3. <input checked="" type="checkbox"/>	Abbas, James	220127194		2.90	Kinesiology (PE) E
4. <input checked="" type="checkbox"/>	Abbett, Jacob	219988588		3.22	Business (Accoun