

# Using the Search Function: Saved Searches and Student Lists

User Guide - November 2023

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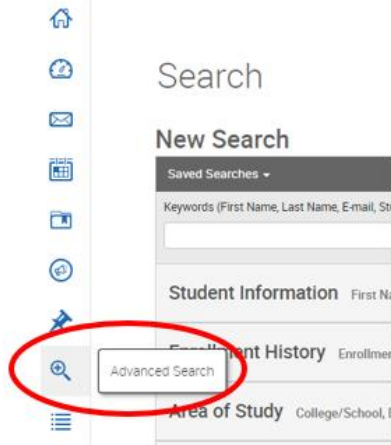
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There are two types of searches: Quick Search and Advanced Search. **Quick Search** refers to the search bar at the top of the page; you can search for one student at a time by entering either their name, Rutgers ID (RUID), or R4S ID into this bar. **Advanced Search** is a method for searching for multiple students using certain criteria. You can save Advanced Searches in one of two ways: as Student Lists or as Saved Searches.

- **Student Lists** are static lists of students, saved by their Student ID. Even as student information changes, the list of students will remain the same. You can use Student Lists as a filter in Advanced Search or in Reports to track information about a group of students.
  - Example: you have a list of students with an “Undeclared” major in Fall 2023, and you want to send a message to those who still are “Undeclared” in Spring 2024. Doing an Advanced Search with those filters (choosing that Student List and choosing “Undeclared” as the major) will return the students you are looking for.
- **Saved Searches** dynamically regenerate lists of students or users based on the search criteria. This feature can be especially helpful if you frequently run the same search at different points in the term as it allows you to maintain consistency with your search parameters. Each time you run a Saved Search, it will return the set of students who currently meet those parameters.
  - Example: if you create a saved search for First Years, the list of students who return for that saved search a year later will be different than at the time of its creation, as many of the First Years will no longer be in that classification.

## Advanced Search:

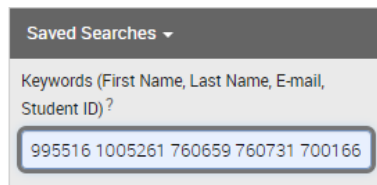
1. You can find Advanced Search on the left navigation bar.



2. You can utilize multiple search parameters by clicking on the filter “drawers”:

A screenshot of the 'New Search' form. At the top is a 'Saved Searches' dropdown menu. Below it is a 'Keywords (First Name, Last Name, E-mail, Student ID)?' text input field and a 'Type?' dropdown menu with 'Students' selected. Below the keywords field are several filter drawers, each with a title and a list of filterable parameters: 'Student Information' (First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List), 'Enrollment History' (Enrollment Terms), 'Area of Study' (College/School, Degree, Concentration, Major), 'Term Data' (Classification, Term GPA), 'Performance Data' (GPA, Hours, Credits), 'Course Data' (Course, Section, Status), 'Assigned To', 'Goals & Interests' (Post Degree Goal, Favorites?), and 'Success Indicators' (Predicted Support Level, Success Markers). At the bottom of the form is a blue 'Search' button and two checkboxes: 'Include inactive' and 'My Students Only'.

- a. Tips for using the “drawers”:
  - i. In the “Keywords” bar above the drawers, you are able to enter multiple RUIDs or R4S IDs separated by a space and search for groups at a time. You can search for up to 600 students at a time.



- ii. “Student Information” drawer:
  1. You can search for your Saved Lists (refer to section below).
  2. You can search for Categories and Tags. In both of these search bars, if you click the “+” button, you are also able to search for students in all identified categories/tags or none of the categories/tags.
  
- iii. “Enrollment History” drawer:
  1. By checking the “+” sign, you can search for students enrolled in any, all, or none of the indicated terms.
  
- iv. “Area of Study” drawer:
  1. The RU-N schools are identified by “NWK:” for the undergraduate schools and “NWK: Grad –” for the graduate schools.

College/School (In Any of These)?

nwk

- NWK: Grad - Rutgers Business School - Newark/New Brunswick - NK**
- NWK: Grad - Rutgers Law School - NK
- NWK: Grad - School of Criminal Justice - NK
- NWK: Grad - School of Public Affairs and Administration - NK
- NWK: Grad - The Graduate School - Newark - NK

College/School (In Any of These)?

nwk

- NWK: Newark College of Arts and Sciences**
- NWK: Rutgers Business School - Newark (U) - NK
- NWK: School of Criminal Justice
- NWK: School of Nursing - NB & NK campus (U) - NK
- NWK: School of Public Affairs and Administration
- NWK: Summer or Winter Session - Newark
- NWK: University College-Newark

- v. “Term Data” drawer:
  1. If you are searching for only those students that are currently actively taking courses, enter “1” in the “Min. Credit Hours” search bar.

**Term Data** Classification, Term GPA

Term?

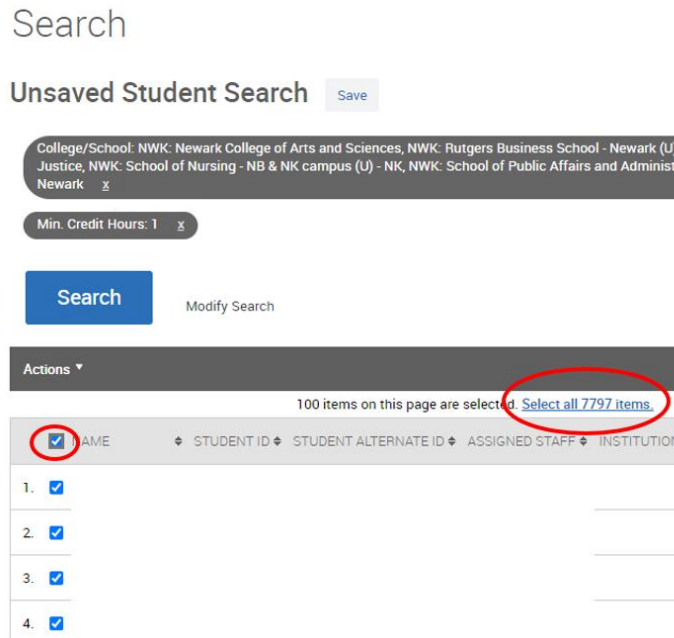
2023 Fall

Min. Credit Hours?

1

- vi. “Assigned To” drawer:
  1. You can search for all students assigned to a particular advisor, EOF counselor, etc.
- b. Additional filters are:
  - i. “My Students Only”: Search only students assigned to you.
  - ii. “Include Inactive”: All RU students remain 'active' in R4S/Navigate, so you do not have to use this check box.

3. Once you have selected all the parameters you would like to use, click “Search”.
4. This will generate a list of students. If there are more than 100 students returned, you need to click “Select all XXX items” to select the full list.



5. Clicking the “Actions” dropdown menu gives you options of what you can do with the list. Be sure you select the names you would like the action to apply to. There are different options if you select less or more than 100 students.

Search

Unsaved Student Search Save

College/School: NWK: Newark College of Arts and Sciences

Search Modify Search

**Actions** ▾

NAME ↕  STUDENT ID ↕

*100 students or fewer*

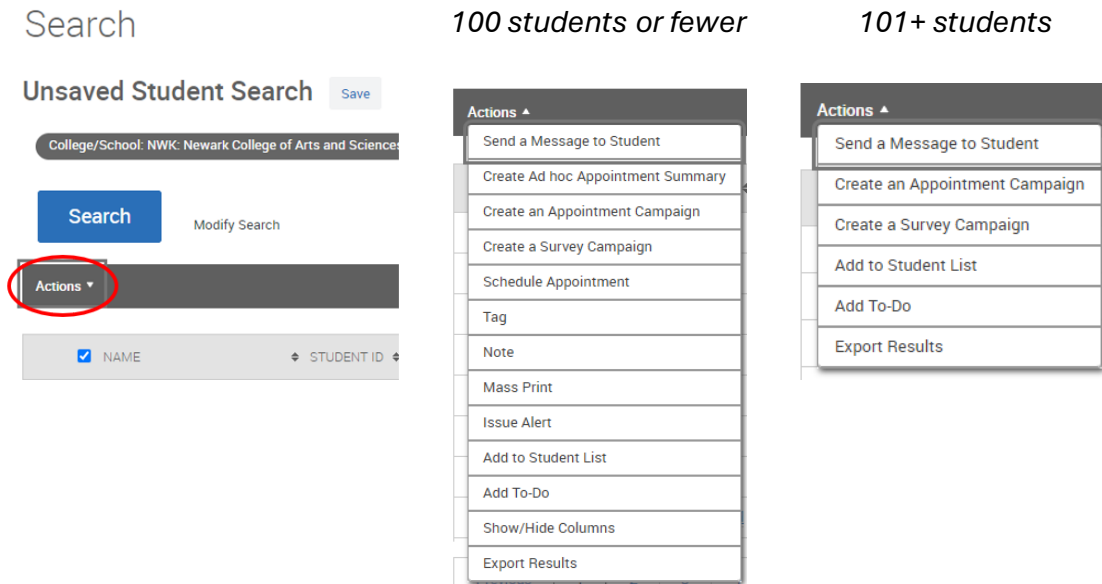
**Actions** ▲

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Create a Survey Campaign
- Schedule Appointment
- Tag
- Note
- Mass Print
- Issue Alert
- Add to Student List
- Add To-Do
- Show/Hide Columns
- Export Results

*101+ students*

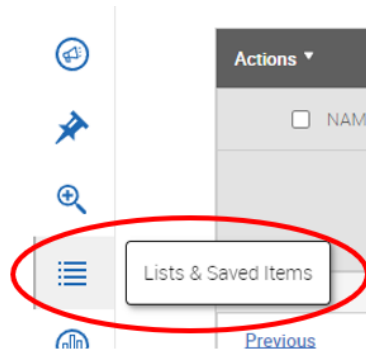
**Actions** ▲

- Send a Message to Student
- Create an Appointment Campaign
- Create a Survey Campaign
- Add to Student List
- Add To-Do
- Export Results



## Saved Searches:

1. You can find your Saved Searches on the left navigation bar.



### Saved Searches

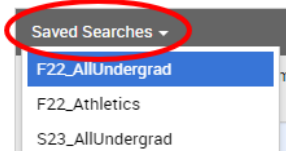
Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

Actions	NAME	USED IN AUTOMATION
<input type="checkbox"/>	<a href="#">F22_AllUndergrad</a>	No
<input type="checkbox"/>	<a href="#">F22_Athletics</a>	No
<input type="checkbox"/>	<a href="#">F23_Artifact_AllMath</a>	No
<input type="checkbox"/>	<a href="#">S23_AllUndergrad</a>	No
<input type="checkbox"/>	<a href="#">SP23_Artifact_AllMath</a>	No
<input type="checkbox"/>	<a href="#">SP23_Athletics</a>	No
<input type="checkbox"/>	<a href="#">Test_AutomatedActions_NewAdvisees</a>	No

2. You can also find your existing Saved Searches in this part of the Advanced Search:

## Search

### New Search



3. There are two ways to save a Saved Search:
  - a. "Save" button with a new Advanced Search:

## Search

### Unsaved Student Search

Enrollment Terms: 2023 Fall

College/School: NWK: Newark College of Arts and Sciences, NWK: Rutgers NK campus (U) - NK, NWK: School of Public Affairs and Administration, & N

Min. Credit Hours: 1

[Modify Search](#)

- b. Under the "Lists & Saved Items" tab on the lefthand side:

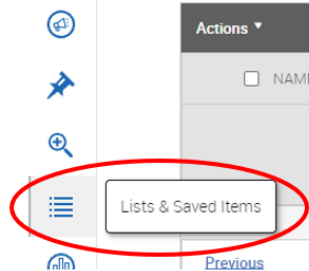
### Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

Actions	NAME	USED IN AUTOMATION
<input type="checkbox"/>	<a href="#">F22_AllUndergrad</a>	No

## Student Lists:

1. You can find your Students Lists on the left navigation bar.

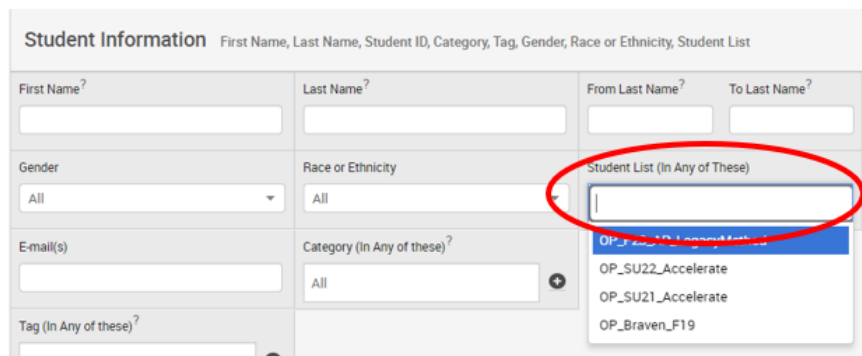


Student Lists

Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.

Actions	NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input type="checkbox"/>	<a href="#">OP_SU22_Accelerate</a>	Yes	14
<input type="checkbox"/>	<a href="#">OP_SU21_Accelerate</a>	Yes	18
<input type="checkbox"/>	<a href="#">OP_F23_AP_LegacyMethod</a>	Yes	6
<input type="checkbox"/>	<a href="#">OP_Braven_F19</a>	Yes	45

2. You can also find your existing Student Lists in this part of the Advanced Search:



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

First Name? Last Name? From Last Name? To Last Name?

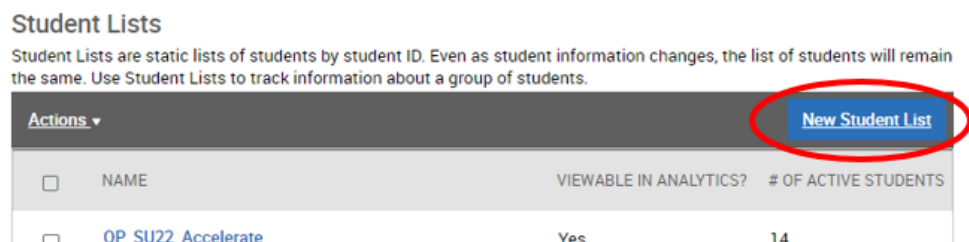
Gender: All Race or Ethnicity: All Student List (In Any of These):

Category (In Any of these?): All

Tag (In Any of these)?

- OP\_SU22\_Accelerate
- OP\_SU21\_Accelerate
- OP\_Braven\_F19

3. There are two ways to save a Student List:
  - a. Under the “Lists & Saved Items” tab on the lefthand side:



Student Lists

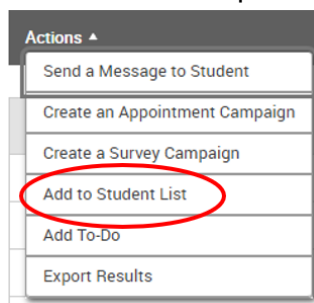
Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.

Actions  NAME VIEWABLE IN ANALYTICS? # OF ACTIVE STUDENTS

[OP\\_SU22\\_Accelerate](#) Yes 14

[New Student List](#)

- b. Under the “Actions” dropdown menu with an Advanced Search:



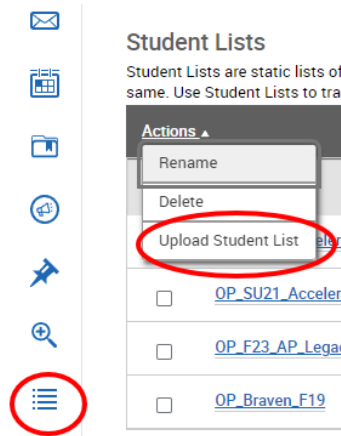
Actions

- Send a Message to Student
- Create an Appointment Campaign
- Create a Survey Campaign
- Add to Student List**
- Add To-Do
- Export Results

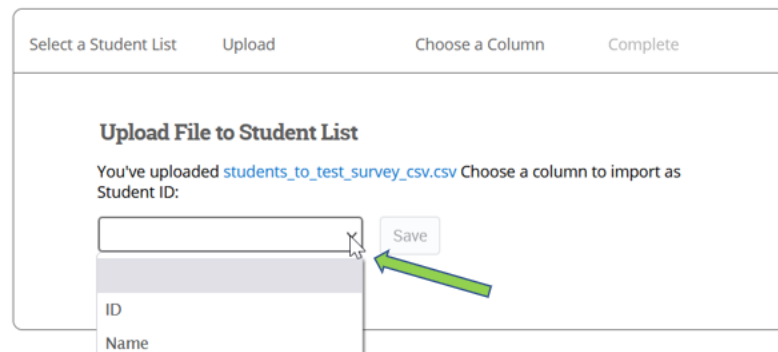
- c. Best practices for naming Student Lists:
  - i. *Please include your last name or initials in the title.* Navigate “super users” can see every user’s Student Lists so this helps to differentiate List names.

4. Another way to create a Student List is to upload a list from Excel:

- a. Click on the “Lists & Saved Items” tab; click the “Actions” dropdown arrows and select “Upload Student List”.



- b. Select the list you want to add the students to. It can be an existing list or a new one. Click “Confirm”. Choose a file to upload. **It must be a .csv file.** Select “Click to upload the file”. Use the pull-down list to select a column from the data for the Student ID. Click “Save”.



- c. Once you confirm the information it will complete the upload and allow you to click on the list. If you do not need the list right now you can always find it again in the “Lists & Saved Items” tab.