

BOILERCONNECT FEATURE SPOTLIGHT SERIES

December 2023

Student Lists and Saved Searches

Feature Spotlights

Fall 2023

- August – Sending Messages
- September – Appointment Campaigns
- October – Staff Dashboard
- *December – Student Lists and Saved Searches*

Today

Student Lists and Saved Searches

- What, Why, & How
- Student List Deep Dive
- Saved Search Deep Dive
- What's Next?

What, Why, & How

Both features are useful for organizing caseloads and taking action with sub-populations of students within BoilerConnect.

Student List

A Static list of students by PUID

Saved Search

A saved set of Advanced Search parameters

Student Lists – How to

You can add a student to any of your Student Lists from the student profile or Advanced Search.

Options

I want to...

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)

Actions ▲

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Create an Appointment Campaign
- Schedule Appointment
- Note
- Mass Print
- Issue Alert
- [Add to Student List](#)
- Show/Hide Columns
- Export Results

Student Lists – How to

To access your previously created Student Lists, navigate to the **Lists & Saved Items** feature and find the Student Lists block. You can also create New Student Lists from this page.



Student List Deep Dive

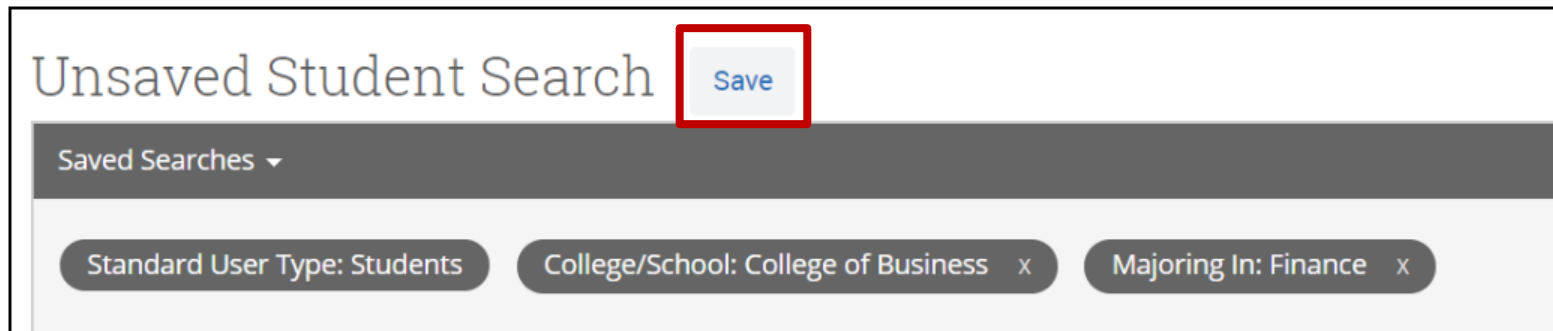
Overview

- Static list
- Not private to creator
- Cannot be shared with other users
- Students can be on multiple Student Lists
- Searchable in Advanced Search
- Filter option on Staff Home Page for viewing students

Saved Search – How to


Saved searches lets users run a pre-configured Advanced Search without having to create the search again. A saved search dynamically regenerates a list of students or users based on the search criteria.

Create a saved search in Advanced Search. After selecting your search parameters and running the search, click the Save button and follow the prompts to save those parameters.



Saved Search Deep Dive

Overview

- Can be created for any Advanced Search
- Students in the initial saved search will change as their data changes
- 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.
- A list of your saved searches can be found within the Lists & Saved Items feature 

What's Next?

Student List Ideas

Any sub-population of students you regularly communicate with or you want to remember is a good option for a Student List.

- 4th Semester (in a program that times out)
- Transfer Students
- Mentors/Mentees
- Ambassadors
- Portfolio Review
- All Aboard – waiting on AP credit
- Prospective Award
- 3rd Attempt of a Course

Saved Search Ideas

Any data-driven sub-population of students you need to know on a regular basis is a good option for a Saved Search.

- Academic Standing
- Students within a certain GPA range
- Students enrolled in a particular course combo
- Students enrolled in a particular minor
- Students expecting to graduate in a particular term that have not yet applied to graduate

THANK YOU

We hope you have enjoyed the Fall 2023 Feature Spotlight Series. Stay tuned for information on the spring series!