

NYU Connect

Filtering Guide for Advisors and Admins

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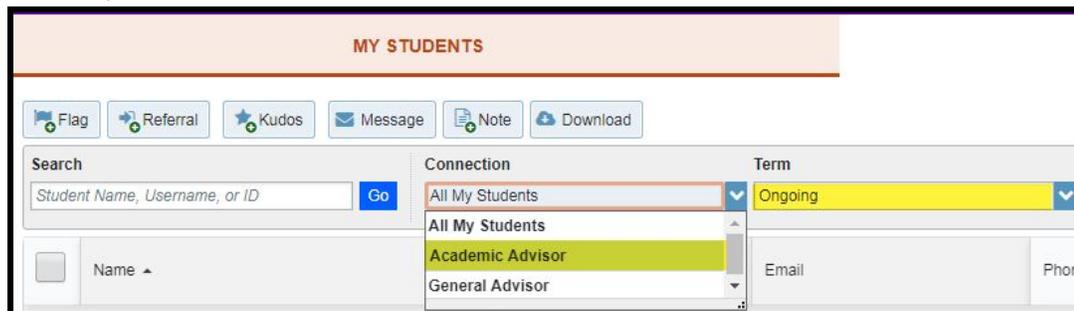
[Find all students considering transferring](#)

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Searching & Filtering Overview

You can view, search, and filter your students and their information based on your “connection” to them in NYU Connect. Your connection is your role that allows you to view a set of student data.

- You can always search for a specific student at any time using the upper-right “Search for students” search box (use N#, Empl ID, preferred name, or NetID).
- Advisors/Faculty Mentors with advisees assigned to them in Albert: you can use this list like your Advisee list in Albert by setting the following filters:
 - Search = [blank]
 - Connection = Academic Advisor OR Faculty Advisor/Mentor
 - Term = Ongoing
 - Cohort = [blank]
- Student Services Professionals will see students based on their job role at the University.



Definitions

- Search
 - You can search by a student’s preferred first/last name, NetID, N#, or EmplID.
- Connection
 - Your role in relation to the students that will be returned by the search.
- Term
 - All - all term(s) in which you have a relationship with at least one student.
 - Active - current term; typically used only by faculty for the best results.
 - Ongoing - no end date specified for the connection, used with advising-related connections. Typically advising, student affairs, and residence life users should use this term in any filter/search they are doing for the best results.
 - Specific term - for faculty teaching course(s) only to find their course(s) in a specific term.
- Cohort
 - Home school of the student, based on their Primary Plan (major)
- Additional Filters
 - Tracking Items
 - Flags and Kudos by status (active/resolved), item(s) created by a

particular user or role, items closed with a certain closure reason.

- Cohorts & Relationships
 - Cohort = home school
 - Organizations - currently two exist: Athletics and Residence Hall
 - Use this filter to find all athletes (by sport), or all students in residence (or by hall)
- Success Plans - not used at this time
- Attributes
 - Admit type, Applied to Graduate, Athlete, Current Student, First Generation student, Graduated student, holds/restrictions (Service indicators), Home School, International Student, on a Leave of Absence, in an Opportunity Program, Major(s), Minor(s) Study Away Location for the term, Veteran and more!
 - For all attributes, leave “term” blank.
 - Use the * as a wildcard before and/or after your search term
 - Attributes that are “yes/no” - select “Assigned to student”; otherwise use “specific value” and enter a search term
 - EX: is the student a veteran? yes/no? → Attribute of Veteran = “assigned to student”

Filtering Scenarios

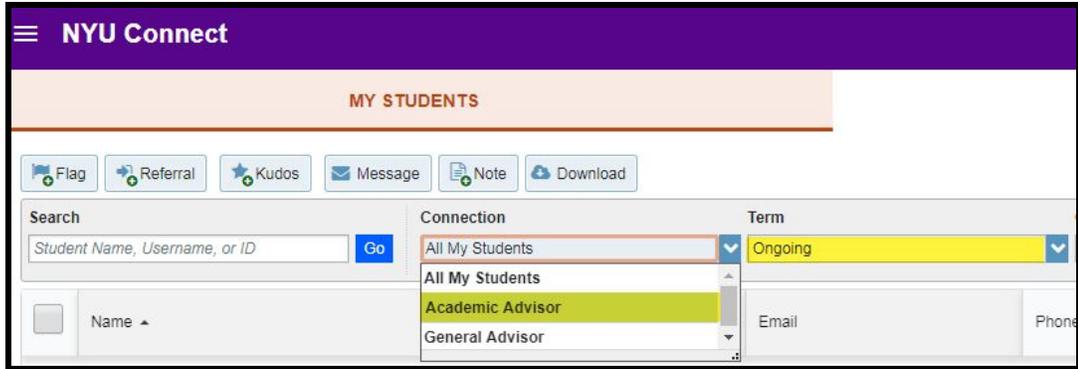
Search for an individual student

- **At any time** by entering their N#, name, NetID, or EmplID in the upper-right search bar. If a student has a preferred name, that will be their name in NYU Connect.



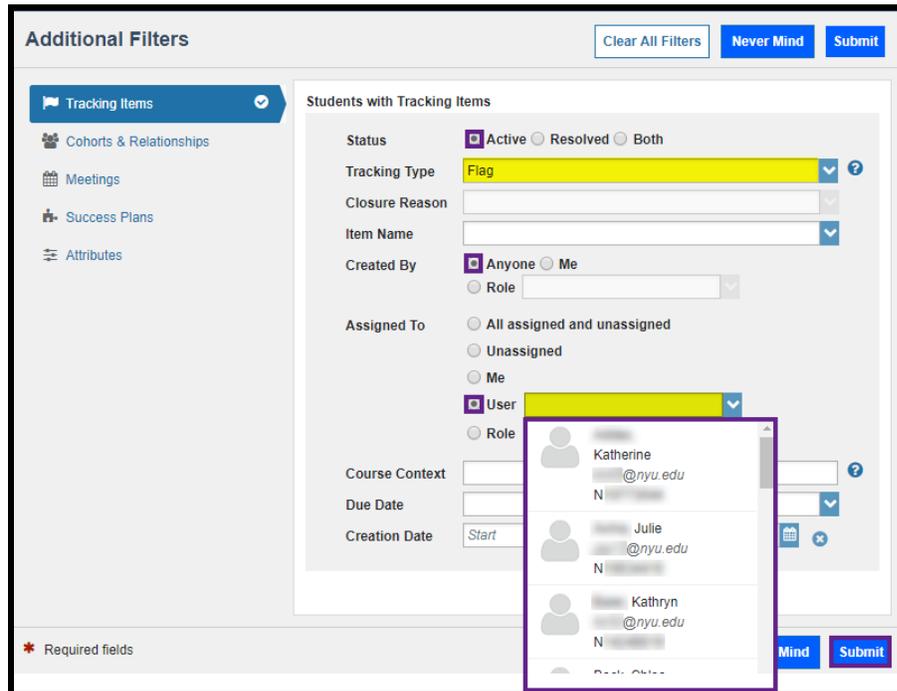
View your list of students based on your connection(s)

1. Navigate to your “My Students” page.
2. Click the main menu button (“Hamburger menu” - 3 horizontal bars) at top left of the page.
3. Click the arrowhead next to “Students” and then click “My Students”.
4. By default, you will see a list of all students you have a connection to in NYU Connect.
 - a. Note that if you have the General Advisor role, you will see all students in the system.
5. Use the filters to narrow down your list.
 - a. As an Academic Advisor, to see your advisees only: Select the Connection as “Academic Advisor”. Select the term as “Ongoing”.
 - Note: As advising relationships have no end date and are not term-based, all advising relationships are “Ongoing”.



An advisor is out - view all their assigned flags

1. Navigate to the “Tracking” tab.
2. Set the “Connection” filter to “All My Students”.
3. Under “Additional Filters” click “Add Filters”. Since you are already on the Tracking page, you will be taken directly to the “Tracking Items” filters.
4. Choose “Active” for Flag Status.
5. Select “Flag” for “Tracking Type”.
6. Leave the “Created by” selection as “Anyone”.
7. For “Assigned To”, select “User” to scroll through a list of users who have flags assigned to them.



- a. Choose someone from the list who has flags assigned to them.
 - b. Only users who have flags assigned to them will appear on this drop-down menu.
8. Click "Submit" to view the list of flags assigned to that advisor.

Find flags that are unassigned for all students in your school

1. Navigate to the "Tracking" tab.
2. Set the "Connection" filter to "All My Students".
3. Use the "Cohort" filter to find/select your school.
4. Under "Additional Filters" click "Add Filters".
5. For "Status," select "Active".
6. Select "Flag" for "Tracking Type" if you only want to see flags.
7. Click "Submit".

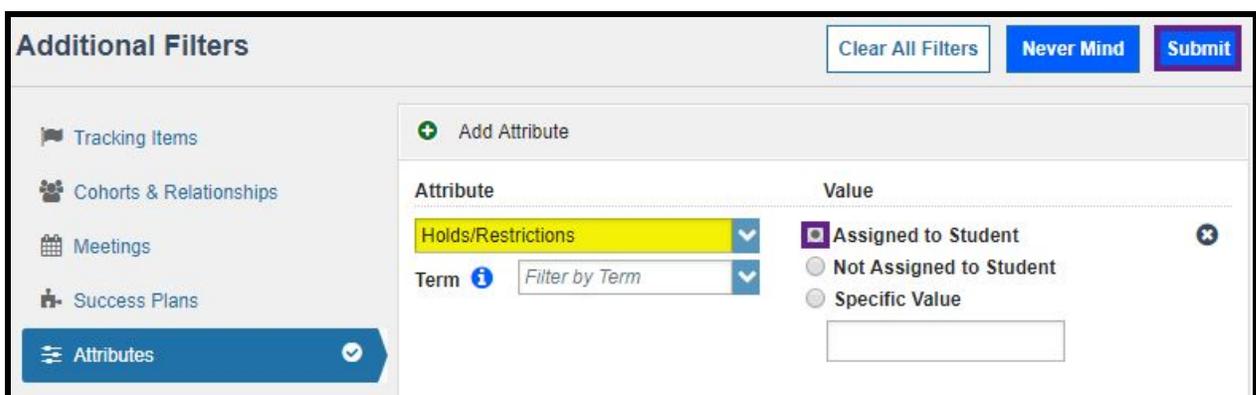
Find all students from the Fall 2018 Cohort (Admit Term)

1. Navigate to the "My Students" page.
2. Select "All My Students" for your "Connection"
3. Leave your "Term" filter as "Ongoing" if you have an Advising role.
4. Click "Add Filters".
5. From the "Additional Filters" menu, click on "Attributes".
6. Click the "Add Attribute" button.
7. On the Attribute drop-down menu select "Admit Type".
8. Select "Specific Value" and type in: *Fall 2017*
 - a. Note! The * denotes a wildcard in NYU Connect. Use the * whenever you know a part, but perhaps not the entire, search term.
9. Click "Submit".

The screenshot shows the 'Additional Filters' panel. On the left, a sidebar lists filter categories: Tracking Items, Cohorts & Relationships, Meetings, Success Plans, and Attributes (which is highlighted with a blue bar and a checkmark). The main area is titled 'Add Attribute' and contains a table with two columns: 'Attribute' and 'Value'. In the 'Attribute' column, 'Admit Type' is selected and highlighted in yellow. In the 'Value' column, 'Specific Value' is selected with a checked box, and '*Fall 2017*' is entered in a yellow-highlighted input field. Other options in the 'Value' column include 'Assigned to Student' and 'Not Assigned to Student', both with unselected radio buttons. At the top right of the panel are three buttons: 'Clear All Filters', 'Never Mind', and 'Submit'.

Find students who have a hold preventing registration

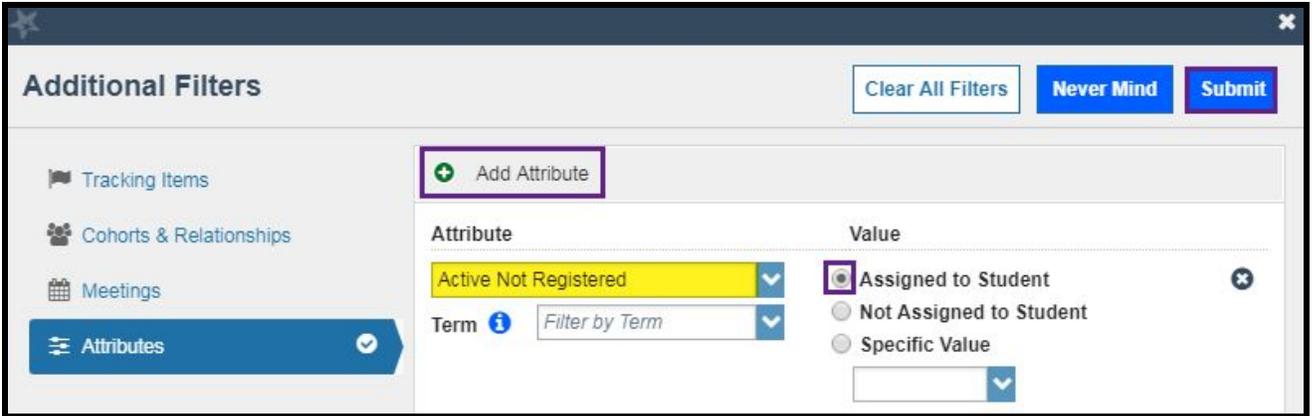
1. Navigate to the “My Students” page.
2. Select “All My Students” for your “Connection”.
3. Leave your “Term” filter as “Ongoing” if you have an Advising role.
4. Click “Add Filters”.
 - a. From the “Additional Filters” menu, click on “Attributes”.
 - b. Click the “Add Attribute” button.
 - c. On the Attribute drop-down menu, select “Holds/Restrictions”.
 - d. Leave the Value as “Assigned to Student”.
 - e. Click “Submit”.



The screenshot shows the "Additional Filters" interface. On the left is a sidebar with navigation options: Tracking Items, Cohorts & Relationships, Meetings, Success Plans, and Attributes (which is highlighted in blue). The main area is titled "Additional Filters" and contains three buttons: "Clear All Filters", "Never Mind", and "Submit". Below these is the "Add Attribute" section. It has a table with two columns: "Attribute" and "Value". In the "Attribute" column, "Holds/Restrictions" is selected and highlighted in yellow. In the "Value" column, the "Assigned to Student" radio button is selected. Other options in the "Value" column are "Not Assigned to Student" and "Specific Value". There is also a "Term" filter dropdown set to "Filter by Term".

Find all Advisees not registered at all for an upcoming term

1. Navigate to the “My Students” page.
2. Select, “Academic Advisor” (or Faculty Advisor/Mentor) for your “Connection” to see your list of advisees.
3. Leave your “Term” filter as “Ongoing”.
4. Under “Additional Filters” click “Add Filters”.
5. From the “Additional Filters” menu, click on “Attributes”.
6. Click the “Add Attribute” button.
7. On the Attribute drop-down menu, select “Active Not Registered”.
8. Leave the Value as “Assigned to Student”.
9. Click “Submit”.



Find all students on a Leave of Absence

1. Navigate to the "My Students" page.
2. Select "All My Students" to ensure you see the greatest number of students possible.
3. Leave "Term" as "Ongoing".
4. Click "Add Filters".
5. From the "Additional Filters" menu, click on "Attributes."
6. Click the "Add Attribute" button.
7. Click the "Add Attribute" button and select "Leave of Absence". Leave "Value" as "Assigned to Student".
8. Click "Submit".

Find all students across all schools who are majoring in something related to computers

1. Navigate to the "My Students" page.
2. Select "All My Students" for your "Connection" filter to ensure that you see the greatest number of students possible.
3. Leave the "Term" filter as "Ongoing".
4. Click "Add Filters".
5. From the "Additional Filters" menu, click on "Attributes."
6. Click the "Add Attribute" button.
7. On the Attribute drop-down menu, select, "Major(s)."
8. For "Value," click "Specific Value" and type in "*computer*".
 - a. *Not case sensitive, but use *s for wildcard!*
9. Click "Submit."

Attribute	Value
Major(s)	<input type="radio"/> Assigned to Student <input type="radio"/> Not Assigned to Student <input checked="" type="radio"/> Specific Value
Term	*computer*

Find all advisees in Lipton Hall

1. Navigate to the “My Students” page.
2. Select “Academic Advisor” (or Faculty Advisor/Mentor) for your “Connection” filter to see only your list of advisees.
3. Leave the “Term” filter as “Ongoing”.
4. Click “Add Filters”.
5. From the “Additional Filters” menu, click on “Cohorts & Relationships”.
6. Check off the box for “Organizations”.
 - a. To find “Lipton Hall,” type “LIPT” (not case sensitive) into the “Find Organizations” Search bar.
 - i. Or scroll to find “NYU HOUSING-LIPT (HOUSING-LIPT).
 - b. Once you find the Hall that you are looking for, double click to bring it over to “Selected Organizations” OR select the “Single Arrow” icon to bring over only your selection.
7. Click “Submit”.

All Computer Science majors in your school who are athletes

1. Navigate to the “My Students” page.
2. Select “All My Students” for your “Connection”.
3. Leave the “Term” filter as “Ongoing”.
4. Select “your school” from the “Cohort” filter.
5. Click “Add Filters”.
6. From the “Additional Filters” menu, click on “Attributes”.
7. Click the “Add Attribute” button.
8. On the Attribute drop-down menu, select “Major(s)”.
 - a. Select “Specific Value” and type: *computer sci*
9. Click the “Add Attribute” button again and select “Athlete”.
 - a. Leave “Value” as “Assigned to Student”.
10. Click “Submit”.

The screenshot shows the 'Additional Filters' interface. On the left, there is a sidebar with navigation options: Tracking Items, Cohorts & Relationships, Meetings, Success Plans, and Attributes (which is selected). The main area is titled 'Additional Filters' and contains a table of filters. At the top right of this area are buttons for 'Clear All Filters', 'Never Mind', and 'Submit'. The table has two columns: 'Attribute' and 'Value'. The first row shows 'Major(s)' selected in the 'Attribute' column. In the 'Value' column, 'Specific Value' is selected, and the value '*computer sci*' is entered in a yellow input field. The second row shows 'Athlete' selected in the 'Attribute' column. In the 'Value' column, 'Assigned to Student' is selected. Both rows have a 'Term' dropdown set to 'Filter by Term' and a close button (X) on the right.

Find all students considering transferring

1. Navigate to the “My Students” page.
2. Select “All My Students” for your “Connection” filter ensure that you see the greatest number of students possible.
3. Change the “Term” to “All”.
4. Leave the “Cohort” filter blank.
5. Click “Add Filters”.
6. Check the box for “Students with Tracking Items”.
7. Select “Both” for flag “Status”.
8. Select “Considering transferring out of NYU” for “Item Name”.
9. Click “Submit”.

Additional Filters Clear All Filters Never Mind Submit

Tracking Items

Students with Tracking Items

Count Tracking Items matching criteria

Status Active Resolved Both

Tracking Type ?

Closure Reason

Item Name **Considering transferring out of NYU**

Left sidebar: **Tracking Items** (checked), Cohorts & Relationships, Meetings, Success Plans, Attributes

Find a class list/roster

1. Navigate to the "My Students" page.
2. Select "All My Students".
3. Leave the "Term" filter as "Ongoing".
4. Leave the "Cohort" filter blank.
5. Click "Add Filters".
6. Click "Cohorts and Relationships"
7. Click "Sections".
8. Enter in subject area and click search.
9. Click and use the arrows to move class(es) to right.
10. Click Submit.

Additional Filters Clear All Filters Never Mind Submit

Tracking Items

Cohorts & Relationships

Meetings

Success Plans

Attributes

Cohort

Term Ongoing

Connection All My Students

Section(s)

Find Sections AE-UY Search

Search Results: 3 results

- Aerospace Propulsion Lecture (...)
- Aircraft Flight Mechanics Lectur...
- Compressible Flow Project (AE-...

Selected Sections: 1 results

- Aerodynamics Lecture (AE-UY-4...

Organization(s)

Required fields Clear All Filters Never Mind Submit