

# ADVISE ON THE WEB SEARCH GUIDE(DRAFT)

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# INTRODUCTION

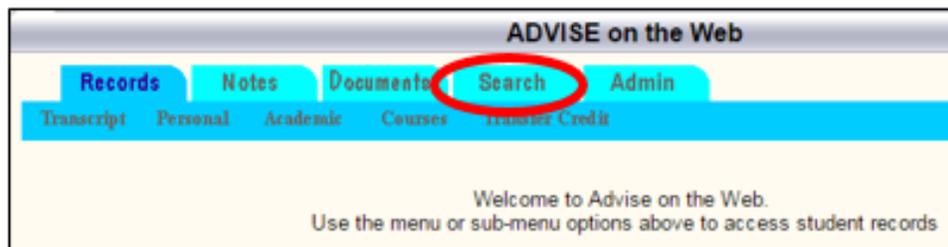
The search feature on ADVISE on the Web (AoW) provides an easy tool to retrieve information and generate lists of students matching specified search criteria. You must have search access granted by your unit approver in order to use this feature.

Please note that the search function does not access real-time SIS data, but the data available from the **SIS Data Warehouse**. This information, which is downloaded once a day, contains students who have been active as far back as seven years.

## GETTING STARTED

To access the AoW query tool:

**Step 1:** Click on the “Search” tab on the **ADVISE on the Web** main menu:



**Step 2:** Select a college or unit

Before you can proceed further, you will be asked to select a college or unit containing the student population that you wish to search (only those colleges or units to which you have access will appear). College access will be limited to students who have at least one major in that college. Further restrictions, if set for an individual user, can further restrict students in certain majors only.

If you choose a non-college unit, your search will be limited to those students in that unit, regardless of college. For example, selecting **College Park Scholars** will provide search access only to students in that program.

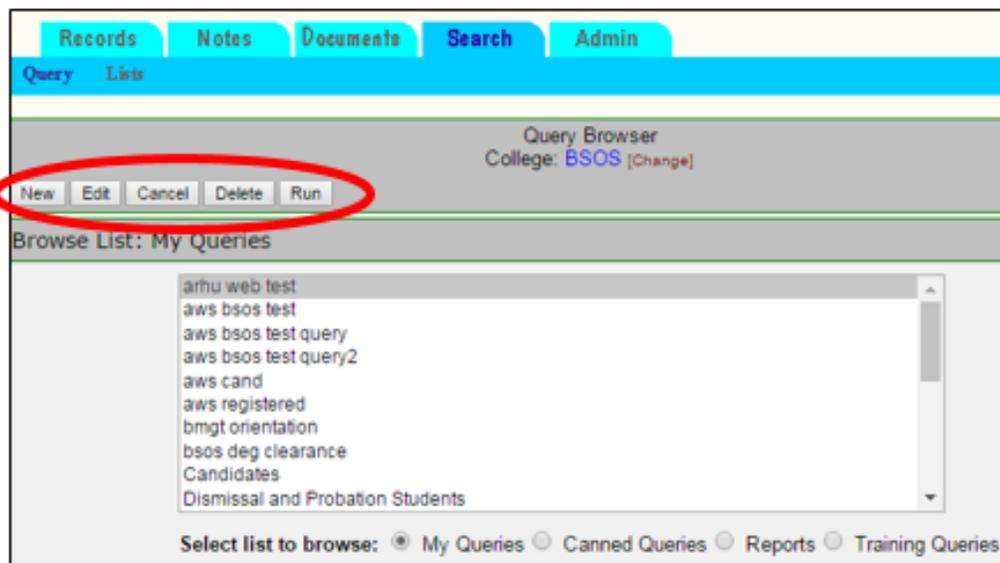
Once you select a college or unit, you will then be taken to the Query Browser screen.

# QUERY BROWSER

AoW allows search users to save queries for later use. Depending on your access level, you may also view and use canned queries and reports created by the Registrar's Office or a College/Unit authorizer.

The initial *Query Browser* screen will display all available queries and the buttons to access all the other search functions that allow you to initiate a new query, as well as view, edit, run or delete existing queries. From this screen you can also go to the screen that allows you to manipulate selection lists created by a previous query. Later on, you can get to this initial screen from other screens by clicking the 'Open' button when available.

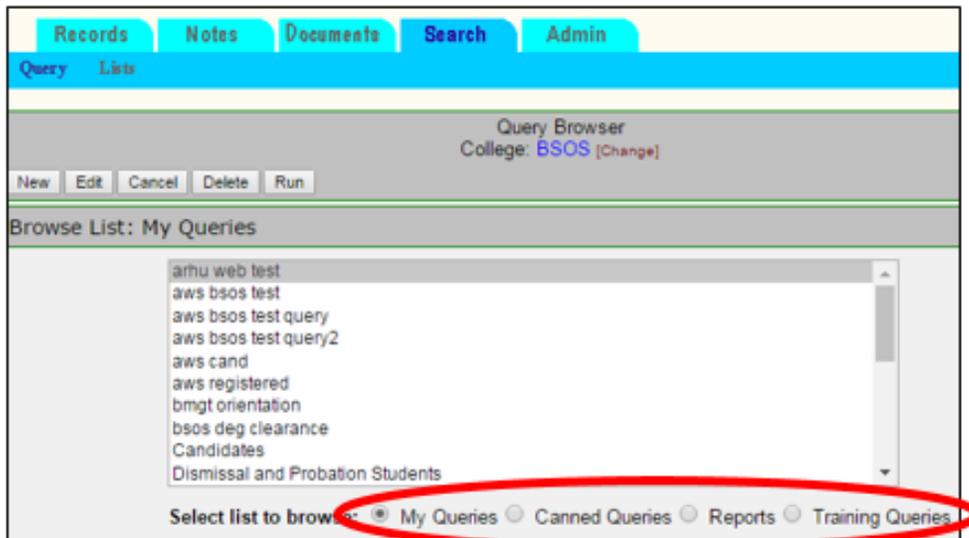
## OVERVIEW OF BUTTONS



- New:** Start/Create a new query
- Edit:** Edit the selected query
- Cancel:** Close 'Query Browser' if reached via 'Open' button
- Delete:** Delete the selected query
- Run:** Run the selected query

## QUERY TYPES

There are 4 different types of queries available to you:



**My Queries:** Queries that you have personally created and saved. Note that if you have never created and saved a query, no queries will be listed when selecting this option.

**Canned Queries:** Queries that others have created for your use. These can include queries that have been developed by users in your unit who have the access to create canned queries for their unit(s).

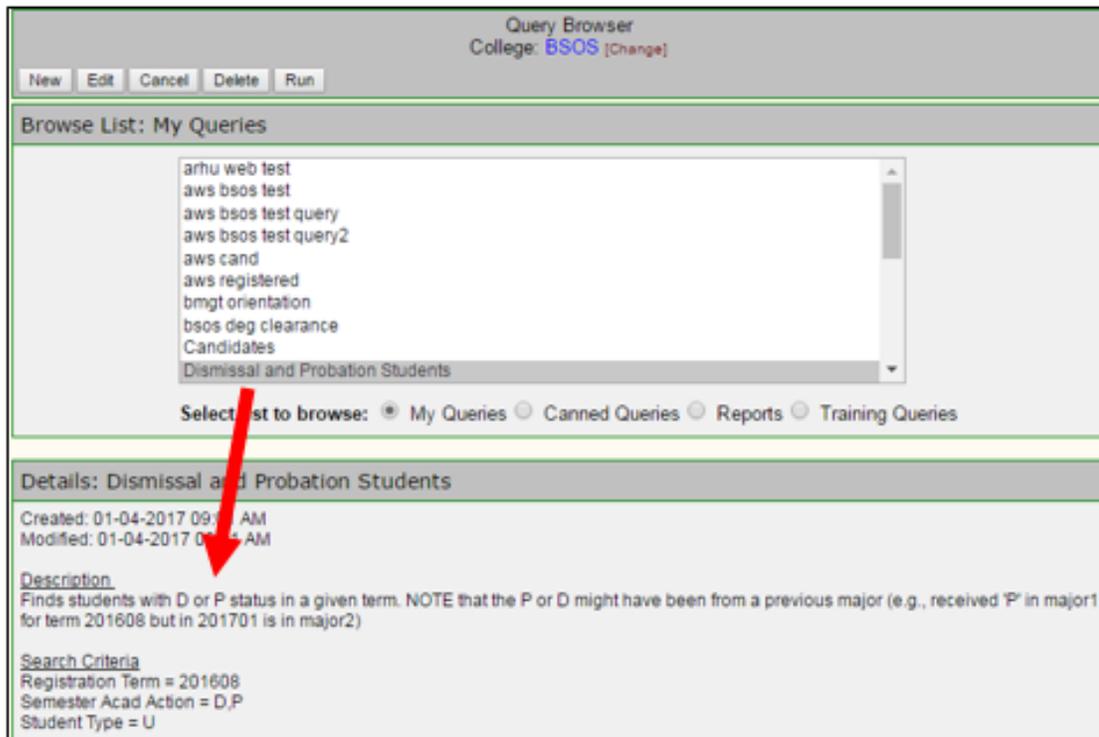
**Reports:** Pre-defined reports that access outside databases (i.e., they do not use the data that are contained in Aow). At this time, there are two kinds of reports available:

1. Orientation reports
2. Uachieve batch report

**Training Queries:** Queries that have been developed for training purposes. Feel free to use these queries at any time; however, note that the parameters of the query might change from time to time, so always double check what the query is set to do.

## VIEWING QUERIES

If you click on any of the saved queries listed in the box, you will see information about that query:



## RUNNING SAVED QUERIES

**RUN:** If after viewing a query you find that it meets your needs, you may run the query by clicking the 'Run' button. Upon clicking 'Run' you will be taken to the *Query Results Screen* (see *Viewing and Working with Results*).

-or-

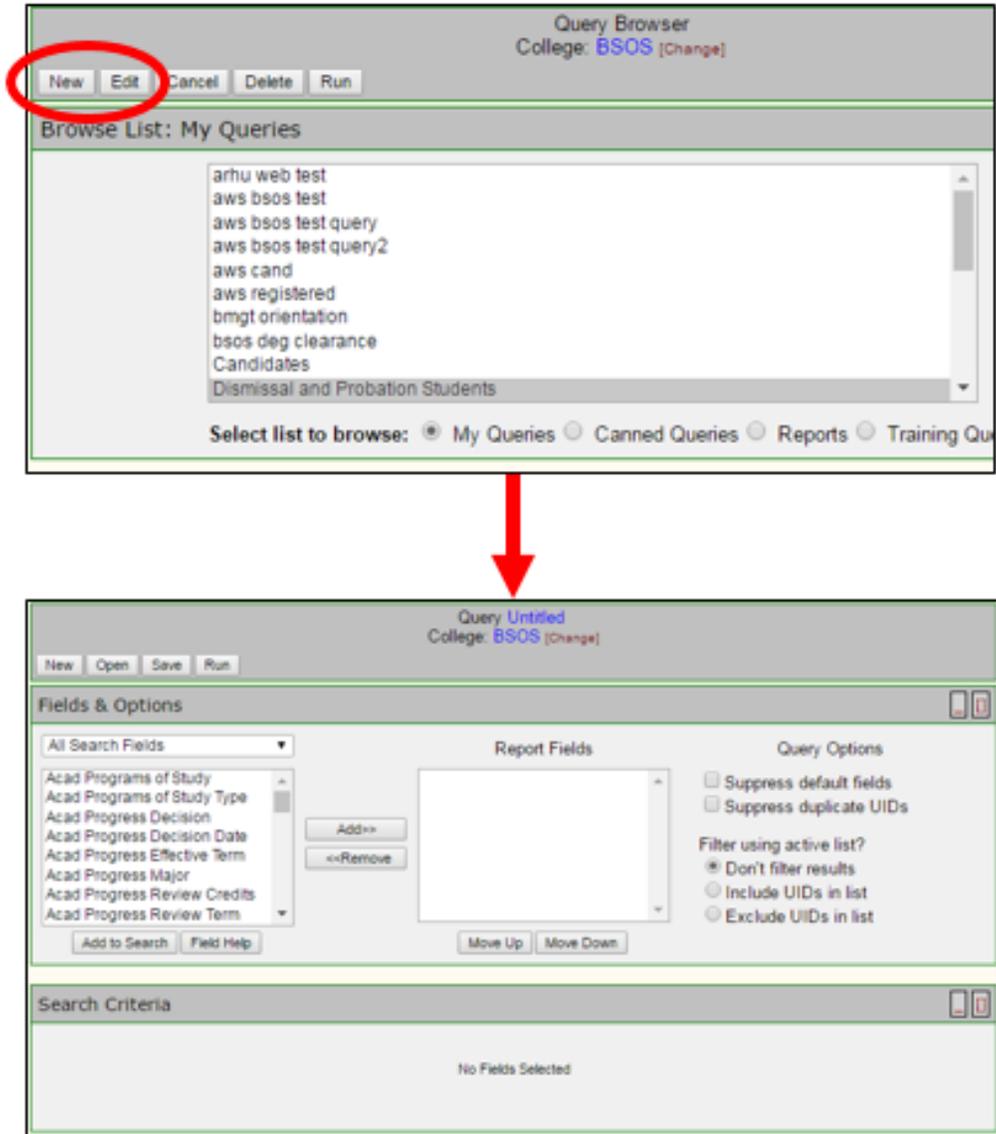
**EDIT:** However, if you decide that the saved query does not quite fit your needs exactly but you still want to use it as a model for another query, you can click the 'Edit' button and you will be taken to a screen where you can make changes to the query (see *Creating & Editing Queries*).

## DELETING SAVED QUERIES

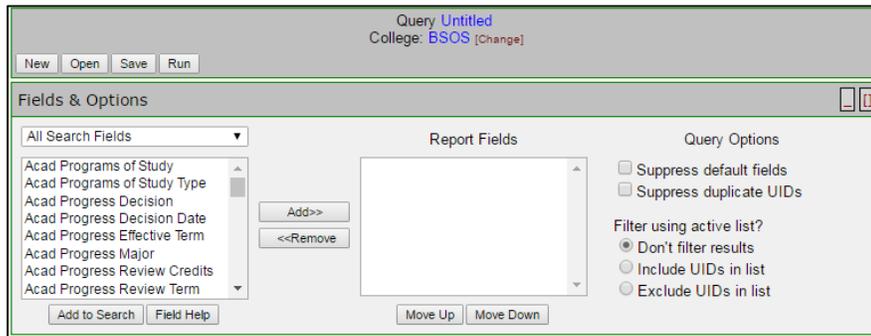
To delete a query, select it from the list and click the 'Delete' button. Please note you can only delete queries from your personal 'My Queries' list. You will not be able to delete 'Canned' queries.

# CREATING & EDITING QUERIES

The *Query Editor* screen allows you to create new queries or to modify existing ones. You can get to this screen by clicking the 'New' or 'Edit' buttons.



## OVERVIEW OF BUTTONS



- New** Create a new query
- \*Open\*** Open a query from using the query browser; This button can be used to return to the query browser
- Save** Save the current query
- Run** Run the current query
- Add to Search** Add the selected field from field(s) list to the 'Search Criteria'
- Field Help** Get Help on the selected field in field list
- Add>>** Add the selected field(s) in field list to the results list
- <<Remove** Remove the selected field from the results list
- Move Up** Move the selected field up in the results list
- Move Down** Move the selected field down in the results list
- X** Remove this field from search criteria
- ?** Get help on this field

## STEPS TO CREATE QUERIES

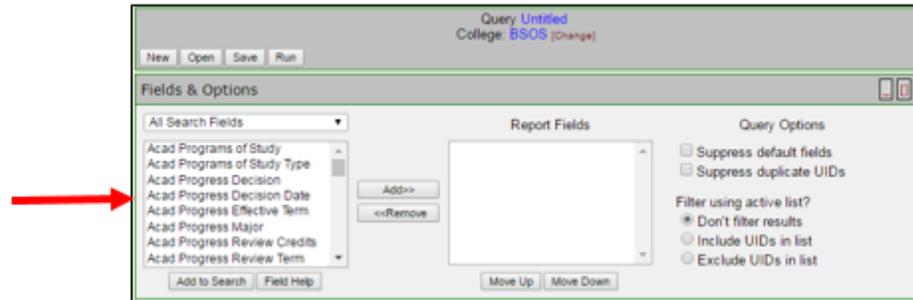
Creating queries is a simple process:

- Step 1:** Select the fields you want for your criteria by highlighting them and clicking on "Add to Search"
- Step 2:** Enter or select the values for these fields
- Step 3:** Add fields to include in results report (optional)
- Step 4:** Save the query (optional)
- Step 5:** Run the query to view the results

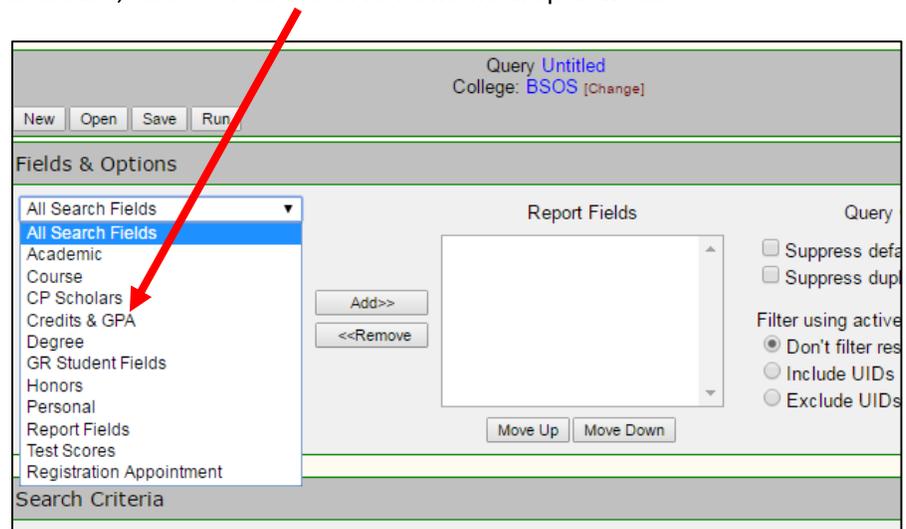
Each step is detailed below.

## STEP 1: SELECTING SEARCH CRITERIA FIELDS

**FINDING A FIELD:** Fields to include in your search criteria can be found in the field list directly under the 'Fields & Options' section. By default the list displays all available fields you may search.



To make finding the field you are looking for easier, they have been grouped together into categories of related fields. The categories are available in the drop down box directly above the fields list. For example if you wanted to search fields related to credits, select 'Credits & GPA' from the drop down list.



**Note:** There is one category called 'Report Fields'. This list contains additional fields you may wish to include in your results. However you will not be able to run any searches using these fields.

**ADDING A FIELD:** To add a field to your search criteria, select it from the field list and click the 'Add to Search' button. This will add the field to the 'Search Criteria' section. Once you have selected your fields go ahead and enter values to restrict your search results.

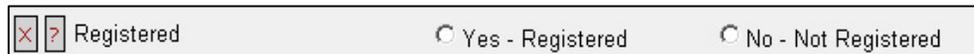
**REMOVING A FIELD:** If after adding a field, or when editing an existing query, you decide you do not want to include the field in your search criteria, simply remove it by clicking the 'X'.

**GETTING MORE INFORMATION:** If you need more information regarding a field, simply highlight it in the field list and click 'Field Help'. Alternatively you can get help by clicking the '?' next to the field name once you have added it to the 'Search Criteria' section.

## STEP 2: ENTERING SEARCH CRITERIA VALUES

When you add fields to your search criteria, they will be displayed in one of two different formats:

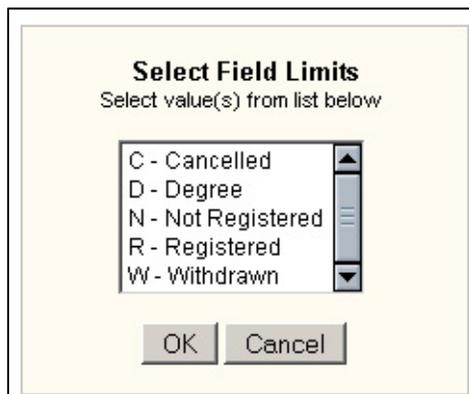
**Format 1:** Format 1 is the simpler of the two. You simply choose the values you want from a predetermined set of values available for that search field.



**Format 2:** Format 2 requires you to choose a Boolean operator from the drop down list (e.g. =, <=, >=, Between, etc) and then enter the values yourself. Values must be in the proper format (e.g. GPA, credits). For information on the format click the help icon.



If you are unsure of proper code values to enter you may click the 'Select Values' button when available to select values. When you click 'Select Values', a window similar to the one below will appear. Then you can select the values you desire and click ok. Multiple values can be highlighted by holding the 'Ctrl' key while clicking each items in the list.



Multiple values can also be entered by hand in the input field, making sure to separate each value with a comma.

### STEP3: SELECTING REPORT FIELDS

#### DEFAULT FIELDS:

By default every query you run will include all of the following:

- the student's UID
- student's name
- any field you include in your search criteria that may have multiple values.

If you do not wish to display these fields in your result, check the 'Suppress default fields' checkbox in the Result Options section. Note that if you check this box, the UID will still be included in your results.

#### ADDITIONAL FIELDS:

If you wish to include any additional fields you must add them to the 'Fields to Include in Results' list. Select the fields from the field list and click 'Add>>'. Conversely, fields can be removed from this list by clicking '<<Remove'. Once you have added items to the result list, you may shift the order of the field columns by highlighting the field and clicking 'Move Up' or 'Move Down'

### STEP4: SAVING QUERIES

It is not required that you save a query to run it. To save a query that you have created or modified, click the 'Save' button and a window will popup asking you to enter a query name and a short description. **Note:** If you try to save it under a name that already exists, it will ask if you wish to replace the existing query.

Any queries you save will be saved in your Personal query list, which you may access via the *Query Browser*.

### STEP5: RUNNING QUERIES

When you are finished creating or editing a query and are ready to run the search, click the 'Run' button and a green search ticker will appear letting you know that the search is taking place. Once the search is completed, you will see the results 1,000 students at a time in alphabetical order. Note that the search may be quick, or may take up to a minute or so depending on the size of your unit, the load on the system, etc.

## EXAMPLE

Suppose you want to find all students in your college who are currently registered or who are future registrants who are attending part-time. For this search we use the well-known field from DEANS/ADVISE called "Status" to find current and future registrants, combined with the Full-time/Part-time field. The screen below shows what the search would look like:

The screenshot shows a search configuration window with the following sections:

- Fields & Options:**
  - All Search Fields:** Degree Intent Type, English Requirement Status, Entry Status, Fulltime/Parttime Credits, Fulltime/Parttime Status, Gender, Honors Appt Dt, Honors Confirm Cd.
  - Report Fields:** (Empty list)
  - Query Options:**
    - Suppress default fields
    - Suppress duplicate UIDs
    - Filter using active list?
      - Don't filter results
      - Include UIDs in list
      - Exclude UIDs in list
- Search Criteria:**
  - Fulltime/Parttime Status:  Full-time  Part-time
  - Status: =  (Dropdown menu shows CU,FR)

Once you click "Run" and the search is completed, the results screen is displayed:

Query: **Untitled**  
College: **ARHU** [Change]

New Edit Open Print Download Save to List Run

|    | Uid        | Name                      | Status |
|----|------------|---------------------------|--------|
| 1  | 0089730026 | West, Kasey Lynn          | CU     |
| 2  | 0089730270 | West, James Cameron       | CU     |
| 3  | 007307460  | Andres Eduardo            | CU     |
| 4  | 008213004  | Arguilla, Melvin          | CU     |
| 5  | 009021868  | Anderson, Anastasia L     | FR     |
| 6  | 007306967  | Arce, Ivan                | CU     |
| 7  | 008326525  | Arreola, Jennifer Sarah   | FR     |
| 8  | 008227095  | Arreola, Marysa Hope      | CU     |
| 9  | 008098258  | Arreola, Christopher John | CU     |
| 10 | 008866735  | Arreola, Hannah           | FR     |
| 11 | 00803551   | Arreola, Colleen          | CU     |
| 12 | 008300413  | Arreola, Shirah Alia      | FR     |

From the above screen you may choose to print the results displayed on the screen, download them to your spreadsheet, or save the UIDs to a selection list.

# VIEWING AND WORKING WITH RESULTS

## OVERVIEW OF RESULTS BUTTONS

Query: Dismissal and Probation Students  
College: BSOS [Change]

New Edit Open Print Download Save to List Run

Data current as of: 02/18/17 08:02 AM; Number of records: 119

|    | Uid     | Name    | Registration Term | Sem Acad Act |
|----|---------|---------|-------------------|--------------|
| 1  | 1A...   |         | 201608            | P            |
| 2  | 1B...   |         | 201608            | P            |
| 3  | 1E30... | Daniel  | 201608            | P            |
| 4  | 1E...   |         | 201608            | P            |
| 5  | 1E7...  | Ridwan  | 201608            | P            |
| 6  | 1D...   | Ahmad   | 201608            | P            |
| 7  | 1128... |         | 201608            | D            |
| 8  | 1E...   | Donneau | 201608            | P            |
| 9  | 1S...   |         | 201608            | P            |
| 10 | 1W...   | James   | 201608            | D            |
| 11 | 1W...   | Sue     | 201608            | P            |
| 12 | 1X...   |         | 201608            | P            |

- New** Create a new query
- Edit** Use this to modify the query you just ran
- Open** Open a query from using the query browser
- Print** Print the current results page
- Download** Download the complete results as a CSV file
- Save to List** Save or append the UID's from the results to a selection list

### NOTE ABOUT DUPLICATE DATA

Due to the nature of the data, duplicate matches sometimes occur and may even be desirable or useful. However, if after running a search you find duplicated data that you wish to eliminate, click the 'Suppress duplicate UIDs' check box and rerun the search. A word of caution about suppressing duplicates: your report will not show duplicates; however, if you download the file to a spreadsheet, the spreadsheet will still show duplicates. This is a problem that will be addressed in the future. If you wish to eliminate duplicates from your spreadsheet (Excel), you must click on the "Data" tab, then the "Advanced Filter" option, then check the "Unique Records Only" box to highlight only unique records, which you must then copy and paste into a new spreadsheet.

## OPTIONS FOR SAVING RESULTS

- DOWNLOAD FILE:** Although you may click the 'Print' button to print the results from the screen, please be aware that if the columns extend beyond the window screen, you will need to make adjustments to your print settings. Also, it is not recommended that you attempt to print from the browser if your results contain more than 1000 students (rows), as you would have to page through each set of 1000 results and print them separately. The "Print" function is most useful if you just want to print data to check or verify results and are not too worried about the formatting. Therefore, if you plan to manipulate the results either for printing, sorting, or passing the data to other applications, it is recommended that you download the results to your workstation and then proceed from there. The downloaded file will be in CSV format, which consists of a plain text file where each line contains a record and each field within a record is separated by a comma. Such a file can easily be opened using Microsoft Excel or any other application that supports the CSV format. You may also open the file using a text editor.
- SAVE FILE AS A LIST:** You may save the UIDs to a selection list by clicking the 'Save to List' button. Doing so will bring up a small window which will ask you to enter the name of your selection list. Such lists can be used to **filter** additional queries, generate transcripts and mass emails (if authorized), and run batch audits in uAchieve. **Selection lists** are explained in more detail on the next page.

# SELECTION LISTS

Selection lists are useful for filtering subsequent searches, exporting UIDs for batch degree audits, generating unofficial transcripts, sending mass emails, creating random samples, or simply saving students from a search for later use. Additional uses of selection lists will be added as applications are developed. The selection list screen below can be reached by clicking the 'Lists' menu item under the Search tab.

Selection lists will not contain duplicates. When saving lists or entering lists by hand, the duplicates will automatically be removed. Selection lists are saved under your user account and cannot be viewed by other users.

## OVERVIEW OF LIST BUTTONS



**New** Create a new selection list

**View/Edit** View or edit the contents of a saved selection list

**Rename** Rename the highlighted selection list

**Delete** Delete the highlighted selection list

**Set as Active** Set the selected selection list as the active selection list

**Sample** Create a random sample from selection list (dialogue will appear asking for details)

**Mass Email \*** Generate a mass Email from selection list

**Transcripts \*** Create unofficial transcripts from selection list (alphabetically)

**Download options** Allows you to download either UIDs, names, or mail merges for letters or reports.

\* Availability of these options based on appropriate authorization

## [NEW] CREATING A NEW SELECTION LIST

Normally you create and populate a selection list by running a search. However, you can also create a new selection list manually by clicking the “New” button. Enter the name of the list when asked. You will be taken to the view/edit mode where you can manually add students to the new list, as explained below.

## [VIEW/EDIT] VIEWING/EDITING SELECTION LIST

When you create a new selection list or click to view/edit an existing selection list, the following screen will appear:

The screenshot shows a web interface for managing a selection list. The window title is "List Contents: handlist". On the left, there is a large text box labeled "UIDs in List" with a vertical scrollbar. Below this box, it says "Total Students: 0". In the center, there are instructions: "To remove uids, select all uids to remove from list on the left and click remove." followed by a "Remove" button, and "To add uids to the list, enter them in the box on right (one uid per line) and click add." followed by an "Add" button. On the right side, there is a smaller text box labeled "UIDs to Add".

If the list already existed or was populated by a search, on the left hand side you would find a list of student UIDs and names. To remove any student(s), simply highlight them and click ‘Remove’. To add new UIDs to this list, type them or copy/paste them to the ‘UIDs to Add’ box and then click ‘Add’. You need to make sure that each UID is on a separate line. You do not need to enter the names, as these will be automatically retrieved once the UIDs are added to the left-hand box.

## [SET AS ACTIVE] ACTIVE SELECTION LIST

An active selection list is a list which you can use in other parts of ADVISE on the Web. To mark a selection list as active, highlight it from saved list box and click ‘Set as Active’

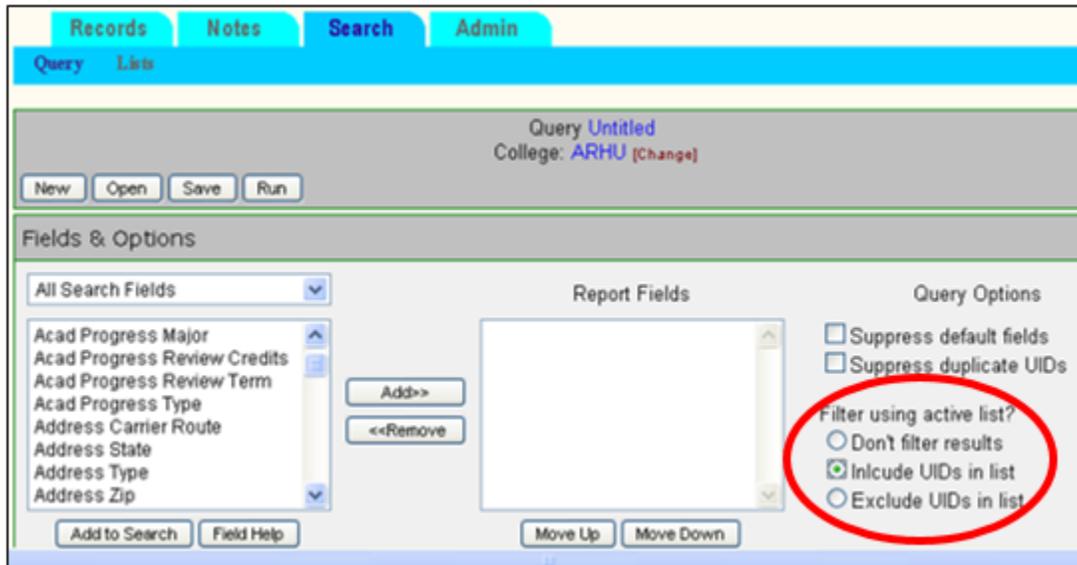
## [DOWNLOAD] DOWNLOADING SELECTION LIST

You may download the contents of a selection list as a comma separated values (csv) file. The drop-down menu allows you to download just UIDs, UIDs and names, or UIDs and mail-merge information that can be fed to software such as MS Word to generate letters and envelopes. This file can also be opened using Microsoft Excel or any other application that supports the csv file format.

# FILTERING

Filtering allows you to limit your search criteria to students in a selection list. This is useful for running compound queries by feeding the results of one search into another.

As the screen below shows, you can either filter students in a selection list through a new search, or you can exclude students in a selection list from being considered in a new search.



Please note that the filter option will remain in effect for all queries you run, unless you uncheck this box. Also **please note** that when you request to “Exclude UIDs in list”, your report will still show all students selected without the exclusion. However, when you download the report to a spreadsheet, the excluded students will have been eliminated. This is a **glitch** that will need to be addressed in the future.

# THINGS TO CONSIDER WHEN RUNNING SEARCHES

## DATA SOURCE

Searches run against data in the University of Maryland’s Student Data Warehouse. This data is not real time and does not reflect up to the minute information found in the Student Information System (SIS). The Student Data Warehouse is refreshed from SIS each night. The data in the warehouse contains students who have been active for the past seven years.

## REGISTRATION STATUS AND REGISTRATION SEMESTERS

### REGISTRATION STATUS

There is a “Status” field in AoW to identify students based on their registration status. Below is a table of all values for “Status” in AoW:

| Code | Description  |
|------|--|
| CA   | Currently registered in Study Abroad                         |
| CS   | Currently registered in a Shady Grove program                |
| CU   | Currently registered – regular                               |
| DG   | Not registered but applied for a degree for current semester |
| FA   | Registered for future semester in Study Abroad               |
| FM   | Future major but not registered yet                          |
| FR   | Registered for future semester - regular                     |
| FS   | Registered for future semester in a Shady Grove program      |
| NC   | Newly admitted and confirmed coming                          |
| NE   | Newly admitted and not confirmed yet                         |
| NN   | Newly admitted and indicated not coming                      |
| OL   | Registered a previous semester but not current or future     |
| PE   | Pending admit to Graduate School                             |
| RA   | Re-admitted  |
| RI   | Re-instated  |
| WD   | Withdrawn – regular  |
| WS   | Withdrawn from a Shady Grove program                         |

Please note that these codes are mainly an indicator of students’ status at the college level in the sense of “belonging”. For example, the status code FM means that the student is not currently in the college but will be in the college in a future semester due to a major change. If the student is currently within a college but has changed to a new major within the same college the following semester, the status field will be CU. Likewise, a status of FR means that the student is not currently registered but has already registered within your college for a future semester.

Once a student leaves your college for a new one, s/he will not be available in your search. Thus, if a student was in Letters and Sciences in fall of 2007 and then becomes a Psychology major in spring 2008, that student will not be searchable by Letters and Sciences once the fall semester is considered concluded (actually around mid-January for AoW). Conversely, that same student will be available in a search during fall 2007 by his/her future new college under status FM or FR. Thus, if you run a search where you specify “Registration Status Code = R” and “Registration Term = 200601”, you will get only those students who meet the above criteria who are still current in your college.

Technical difficulties aside, one can rationalize the limitation described above by noting that AoW is an advising tool designed to help a college identify students whom it is currently advising or will be advising in the future. AoW is not designed as a tool to conduct studies and statistics of past activities. If a college wants to gather statistics about its past students who have moved to a different college since then, the college must access the Student Data Warehouse directly using Brio Query or another similar tool designed for that purpose.

#### REGISTRATION TERM

“Registration term” is a very important field in that it controls the value contained in other search fields that depend on semester. For example, if you are looking for all part time students by using the field “Fulltime/Part-time Status”, you must specify the “Registration Term” that applies to your search. Otherwise the results are unpredictable because the search does not automatically default to the current semester.

Another value of using “Registration term” in conjunction with “Registration Status Code” is when refining your search for future semesters. One example is late in the fall when you wish to search for students in your college who are already registered specifically for the winter session or for the spring semester (a differentiation that cannot be done using the traditional “Status” field).

#### COURSE SEARCHES

When including a course search field in your search criteria, the results will return one row (or record) per student per course matching your query.

By default course searches will look at all courses – UM historic, UM current, and transfer courses with a UM equivalency. If you wish to restrict your search to only certain types of courses (e.g., historic only), you will need to include the “Course Type” search field. Likewise, by default course searches look at all course records of a particular course type regardless of term. You should include the ‘Course Term’ field to limit your course search to a specific term.

**Much care must be taken** when searching the field “Course” with the “Not =” operator to look for students who have not taken specified courses. When using “Course” with the “Not =” operand, **do not** include any course fields in the report option. Aside from the fact that it makes no sense to try to report

information about courses that have not been taken, adding course information to the report will actually throw off the search and produce totally erroneous results. Also, note that the “Course Credits”, “Course Grade”, and “Course Section” fields will be ignored when searching for students who have not taken a certain course.

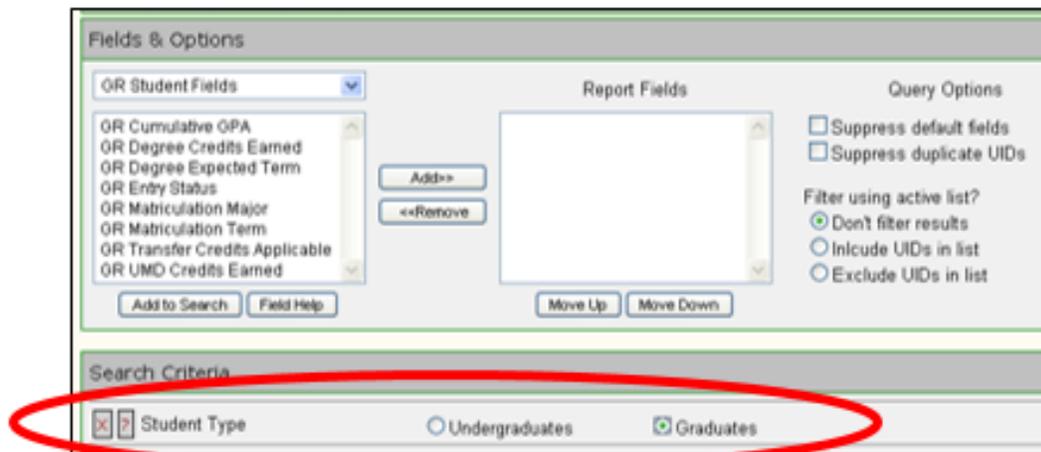
Searching for certain course conditions may require filtering a selection list from one search into the next one. For example, if you wish to identify students who have taken PHYS102 but never taken PHYS103, you first search for students with “Course” = PHYS102. Then you save the results into a selection list, and run a new search filtering the saved selection list with “Course” not = PHYS103. A similar approach can be used when checking for course pre-requisites.

### CAUTION WHEN CREATING UNOFFICIAL TRANSCRIPTS

When you choose to generate and print unofficial transcripts from a selection list, please be aware that the information is cached by your browser if the transcripts are displayed within your browser, which is the default methodology. In the event that the transcripts are created outside the browser and viewed with Adobe, the information is saved in temporary files in your PC’s Document and Settings. In order to insure that none of this sensitive information is kept either in your browser’s cache or you PC after you finish, please make sure that you either clean the cache or delete the temporary files. You can clean your browser’s cache by clearing the private data, usually available under the browser’s “Tools” menu. You can delete temporary files from your PC by clicking the “Start” button (Windows XP), then “All Programs”, then “Accessories”, then “System Tools”, and finally “Disk Cleanup”.

### GRADUATE VERSUS UNDERGRADUATE STUDENTS

The ADVISE on the Web search always defaults to undergraduate students. If you wish to be specific about the type of student you want to query, use the “Student Type” field. Additionally, if you wish to search for graduate student information, click the “GR Student Fields” from the drop-down menu to access all search fields limited to graduate students:



## SEARCHING FOR MAJORS

The field labeled “Matriculation Major” refers to the major that the student was enrolled in when s/he first matriculated at the University. For example, a student who was admitted for the spring 2008 semester but began attending the fall 2007 semester under the Freshman Connection program will have a matriculation date of 200708 and a matriculation major of 66FCP. When searching for students with majors, double major/degree, triple major/degree, etc., the field “Major” should be used. This field encompasses all of those values. When included in a report, all majors will be displayed one after the other on the same line. However, if you are interested in searching individually for minors, certificates, or specifically for double majors, etc. the field “Acad Programs of Study” should be used in conjunction with “Acad Programs of Study Type”. Note that if these fields are included in a report, each existing value will appear on multiple lines with all the other information repeated.

## SEARCHING FOR DEGREE RECIPIENTS

Here is a word of caution about searching for students in your college who have received degrees (by searching on the “Degree expected term”). You will only get students who are still active in your college, or whose last activity was within your college, at the level that you are searching (graduate or undergraduate). The AoW data extraction program has been programmed to allow you to continue getting undergraduates who received a degree and have applied to Graduate School as long as their graduate application is pending. The student’s status will appear as “PE’ for pending in order to alert you that the student has applied to graduate school. In AoW a student is either graduate or undergraduate (i.e., a student cannot appear simultaneously in both databases).

Also, if searching for graduate degree recipients (or applicants), use the field “Degree Expected Term” in the general selection fields. If you use the similarly-named field within the “GR Student Fields” category, you will be looking at the calculated degree expected term based on the date of the graduate application, and not the actual degree term.

## SEARCHING FOR NON-COLLEGE GROUPS (E.G., HONORS, CPS, OMSE, ETC.)

Because the “Status” field has been expanded in AoW over its counterpart in DEANS/ADVISE, care must be taken when searching in AoW to make sure that you include all categories of students desired. For example, if you search in AoW for University Honors students with “Status = CU”, you will exclude Shady Grove Honors students who have a “Status” of CS.