

## Saving Search Criteria in TN Pulse Connect

The **Saved Filters** feature allows users to run a standard or advanced student search, save the filters used in the search, name the search, and access that set of filters later. Users also can update an existing filter, such as including another grade level or deleting existing filters. The filters are saved within each user’s account. Filters are not shared between users.

### To Create a New Filter:

1. Go to the basic or advanced student search.
2. Enter the search criteria that you want saved, select **Saved Filters**, and select **Create Filter from Selected Options**.

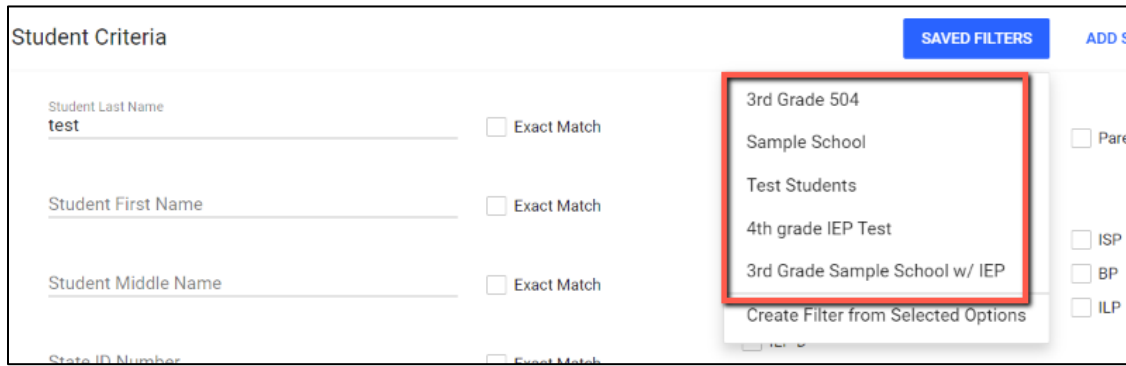
The screenshot shows the 'Student Criteria' search interface. At the top right, there are three buttons: 'SAVED FILTERS' (highlighted in red), 'ADD STUDENT', and 'ADVANCED SEARCH'. Below these are search criteria fields: 'Student Last Name' (with 'test' entered), 'Student First Name', 'Student Middle Name', and 'State ID Number'. Each field has an 'Exact Match' checkbox. To the right of these fields is a dropdown menu with the following options: '3rd Grade 504', 'Sample School', 'Test Students', '4th grade IEP Test', '3rd Grade Sample School w/ IEP', and 'Create Filter from Selected Options' (highlighted in red). Further right are checkboxes for 'Parentally Placed Private School', 'ISP', 'BP', and 'ILP'.

3. Type the name of the filter and select **Save**. This will add the new filter to the list of saved filters.

The screenshot shows a modal dialog box titled 'Add Filter' with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled 'Filter Name' with '(Required)' in red text below it. The input field is highlighted with a red border. At the bottom right of the dialog, there are two buttons: a green 'CLOSE' button and a green 'SAVE' button (highlighted with a red border).

## To Select an Existing Filter:

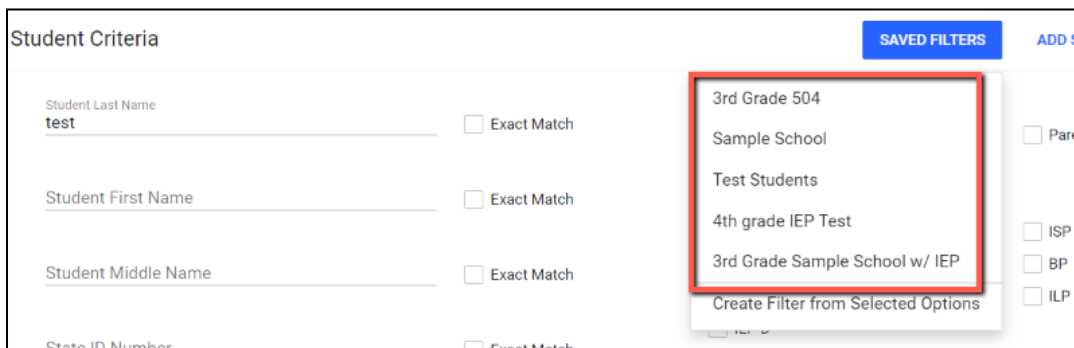
1. Go to the basic or advanced student search and select **Saved Filters**. Select the filter from the list of saved filters. This will populate the search criteria that are saved within the filter. You have the option to add/remove additional search criteria before selecting **View Students**.



The screenshot shows the 'Student Criteria' search interface. A dropdown menu is open, displaying a list of saved filters: '3rd Grade 504', 'Sample School', 'Test Students', '4th grade IEP Test', and '3rd Grade Sample School w/ IEP'. The '3rd Grade 504' filter is highlighted with a red box. The background shows search criteria fields for Student Last Name (with 'test' entered), Student First Name, Student Middle Name, and State ID Number, each with an 'Exact Match' checkbox. On the right, there are checkboxes for 'Parentally Placed Private School', 'ISP', 'BP', and 'ILP'. A 'SAVED FILTERS' button is visible in the top right corner.

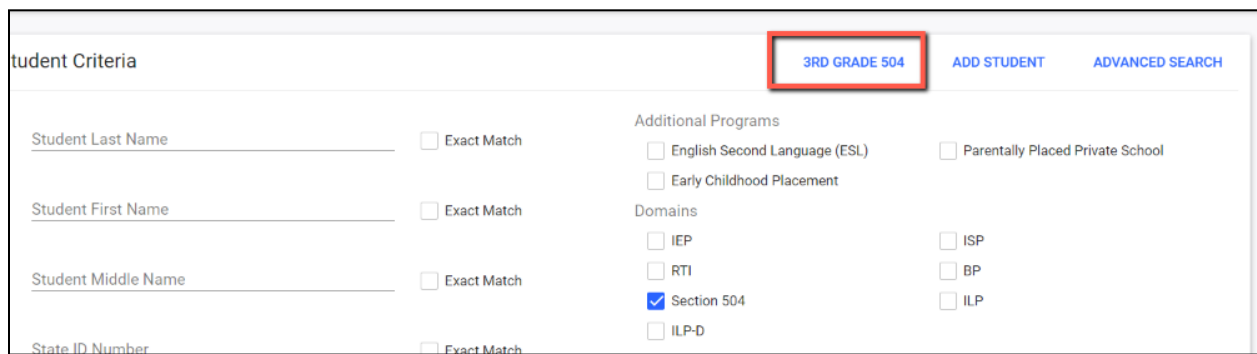
## To Update or Delete an Existing Filter:

1. Go to the basic or advanced student search and select **Saved Filters**. Select the filter from the list of saved filters. This will populate the search criteria that are saved within the filter.



This screenshot is identical to the one above, showing the 'Student Criteria' search interface with the '3rd Grade 504' filter selected in the dropdown menu.

2. If you want to edit the existing filter, make the updates to the search criteria, and select the filter name. If you want to delete the filter, select the filter name.



The screenshot shows the 'Student Criteria' search interface with the '3RD GRADE 504' filter selected, highlighted with a red box. The search criteria fields are populated with the filter's settings. Under 'Additional Programs', 'English Second Language (ESL)' and 'Early Childhood Placement' are unchecked, while 'Parentally Placed Private School' is checked. Under 'Domains', 'IEP', 'RTI', and 'ILP-D' are unchecked, while 'Section 504' is checked. 'ISP', 'BP', and 'ILP' are also unchecked. The 'ADD STUDENT' and 'ADVANCED SEARCH' buttons are visible in the top right corner.

3. If you are editing the filter, select **Save Changes to the Current Filter**. If you are deleting the filter, select **Delete Current Filter**.

The screenshot displays the 'Student Criteria' filter interface. On the left, there are five input fields, each with an 'Exact Match' checkbox: 'Student Last Name', 'Student First Name', 'Student Middle Name', 'State ID Number', and 'Student ID'. On the right, there is a dropdown menu currently showing '3RD GRADE 504'. The dropdown menu is open, showing a list of filter options: 'Clear Filter Selection', '3rd Grade 504', 'Sample School', 'Test Students', '4th grade IEP Test', '3rd Grade Sample School w/ IEP', 'Save Changes To Current Filter', and 'Delete Current Filter'. The last two options are enclosed in a red rectangular box. To the right of the dropdown menu, there are several other filter options with checkboxes: 'Parentally Pla', 'ISP', 'BP', and 'ILP'. At the top right of the interface, there is a blue button labeled '3RD GRADE 504' and a link labeled 'ADD STUDENT'.