Creating and Managing Student Lists

A Student List is a static list of students by student ID. You can use Student Lists in a variety of ways, from maintaining a list of students to track over time in [Intervention Effectiveness](#) or offline, to sending messages or [Appointment Campaigns](#) directly from the Student List.

Creating Student Lists

There are several ways to create a Student List or add students to a Student List.

> **Note.** Because some tools in the platform display *all* Student Lists in filters, please use a standard naming convention for your Student Lists that explains the purpose of the list (e.g., F17 Senior His Maj, F17 Transfer 1st Gen). Talk to your Application Administrator if you have questions about the naming conventions for Student Lists at your institution.

Option 1. Create Student List or add students through Advanced Search

Open Advanced Search and set your search filters. When the list of student results appears, select all students you want to add to your Student List by checking the box in front of their name. You can select the entire list by click the **All** option. Note that if you decide to perform this action on only certain students from the list, you are limited to selecting from those students within the results page you are currently viewing, up to the maximum of 100.

After selecting your students, open the **Actions** menu. From here, follow these steps:

1. Select **Add to Student List.**
2. Add students to an existing list OR create a new list.
3. After naming your list (if applicable), click **Save**.
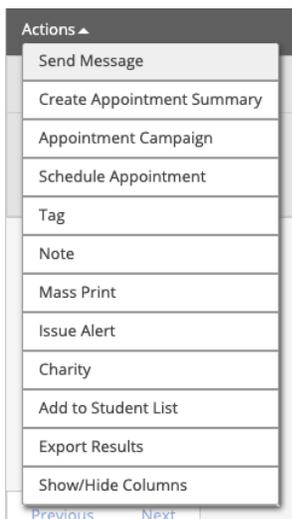
You have a static list of students that will not change over time.

When adding multiple students to a list, platform notations will indicate if all, some, or none of the selected students are already part of a current student list.

- **If none** of the students selected are on a student list, **the student list check box will be empty**, such as the "Freshman" student list example in the screen shot.
- **If some** of the students selected are on a student list, **the student list check box will have a dash "-"** to indicate that some, but not all, of the students are already included on that list. The example in the screen shot is the "Student List 2."
- **If all** of the students selected are on a student list, t**he student list check box will have a checkmark**, such as the example "Student List 1" in the screen shot.

You can click on any of these checkboxes to clear these indications and select the list as the placement for your selected student list.
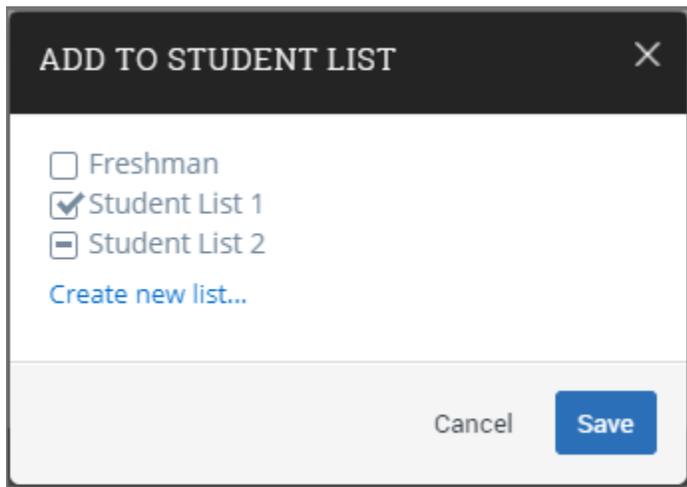

Option 2. Upload Student List from a list of Student IDs

You can upload a list of students from a CSV file into Navigate to create Student Lists, too.

Warning. The file must be a CSV file, not a CSV UTF-8 file.

To upload a student list from a CSV file, do the following steps:

1. Open the **Lists and Search** page in Navigate Staff.
2. Select **Upload Student List** from the **Actions** menu in the Student Lists section of the page as shown in the following image.
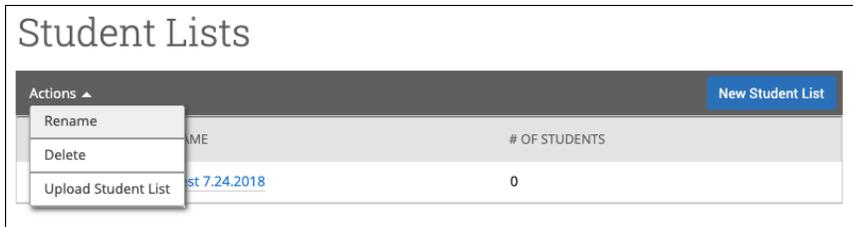
Upload Student List in Actions Menu

4. Add students to an existing list OR create a new list.
5. Select the CSV file and click **Upload**.
6. Choose the column in your CSV file that represents Student ID and then finish importing the file.

> **Warning.** The column containing student IDs in the CSV must wide enough to display the entire student ID or the platform cannot read it.

Option 3. Add Students to Student List from Student Profile

Select **Add to Student List** in the Actions panel of a student profile as shown in the following image.
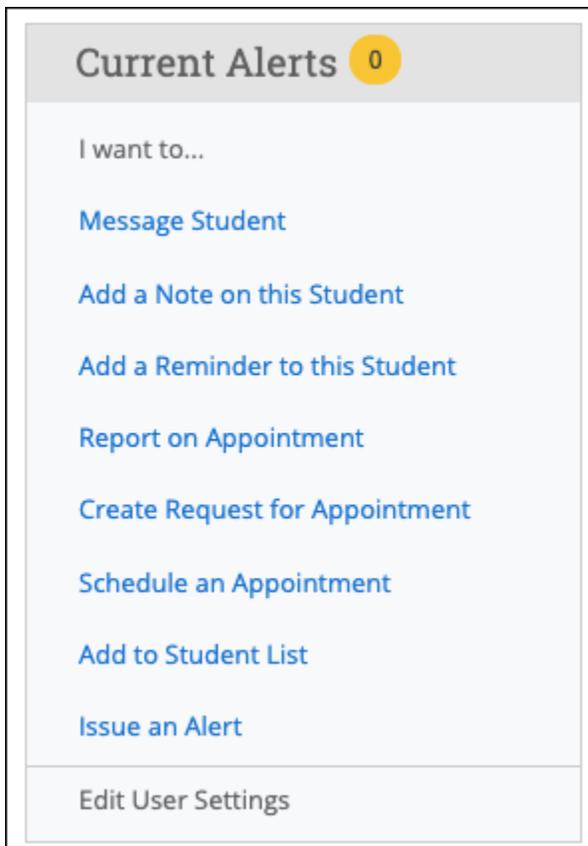

Choose which Student List or Lists to add the student to, or create a new Student List and add the student to it.

Using Student Lists in Strategic Care and Intelligence

After creating a Student List, you can access them from the following areas in Navigate.

Staff Home Page

By clicking **My All Assigned Students**, you can select a list from any of your Saved Searches or Student Lists to show on your Staff Home instead of the default list of assigned students.
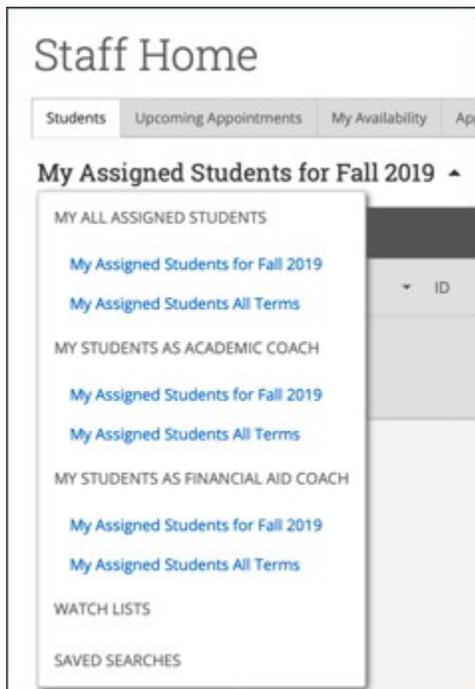
Lists and Searches Page

Student Lists and Saved Searches have their own page as shown in the image below.

Access your Saved Searches and Student Lists on this page or upload new lists.

Open any Student List by clicking its name on the Student Lists panel.

Student Lists

	NAME	# OF STUDENTS
Actions ▾		New Student List
☐		
☐	Test 7.24.2018	0

After opening a Student List, you can modify, delete, or save a different version of the Student List.

Advanced Search

Student List is a filter option in the **Student Information** drawer in Advanced Search. Select one or more Student Lists to narrow your results, as shown in the image below.

Intervention Effectiveness

Student Lists are a filter option in Intervention Effectiveness. Use Student Lists to select a student population and analyze changes in outcomes for those students over time and/or compare their outcomes to those of another student population.

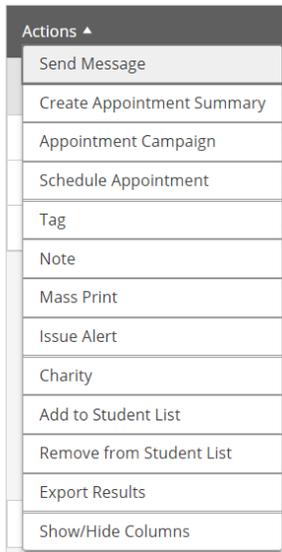## Using the Actions Menu with Student Lists

The **Actions** menu for a Student List is a valuable tool with several options. To open the **Actions** menu, take the following steps:

1. Open a Student List via the 'Lists & Saved Items' tab.
2. Select the boxes next to the students you want to take action on.

3. Open the **Actions** menu and select one of the items. The actions are described below.

Send Message

Opens a **Send a Message** dialog. User can send an email or text message (with or without an attachment) to the students selected.

Create Appointment Summary

Creates an appointment summary report for the selected students to record an appointment with them.

Appointment Campaign

Creates an appointment campaign starting with the students added.

Schedule Appointment

Opens the Schedule Appointment page. Users can then schedule appointments for the student.

Warning. If multiple students are selected, the appointment will begin as a group appointment.

Tag

Allows users to select tags to add to the student's profile.

Warning. Choosing this action does not allow user to create new tags.

Note

Adds a note to the student profile.

Mass Print

Enables users to mass print Custom Student Reports and Student Calendars from the search results.

Issue Alert

Opens the **Issue Alert** dialog and marks a student at-risk.

Important. This action can only be used for one student at a time.

Add to Student List

Add students to another Student List

✔ : Means all selected students are on that list.

━ : Means some of the selected students are on that list

☐ : (blank square) Means the selected students are not on that list.

Remove From Student List
Removes the selected students from the current list.

Charity/Study Hall
Adds time that student has spent in Study Hall to their information on the platform.

Export Results
Creates a CSV file of students that downloads to your computer and can be used with other systems.

Frequently Asked Questions

Can I see another user's Student List?

Yes, if you have the permission to search for Non-Students, you can navigate to the page of the user whose Student List you'd like to see, and follow the steps above for viewing Student Lists on Staff Home.

What is the character limit for Student List titles?

32 characters.

I added a Student List, why isn't it appearing in the filter dropdown in Intervention Effectiveness?

Intervention Effectiveness is developed in a separate application from the rest of the Navigate platform. Data from Navigate loads into Intervention Effectiveness nightly. After you have created or updated a Student List in Navigate, please allow one day for it to appear in Intervention Effectiveness.

How is a Student List different from a Saved Search?

A saved search is a saved set of parameters. Each time you run a saved search, it will return the set of students who currently meet those parameters. For example, if you create a saved search for Freshmen, 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 freshmen will no longer be in that classification. A Student

List, on the other hand, is a static list of students, saved by their student ID, and the list of students will remain the same over time.

If I delete an old Student List I used to create a campaign, will the deletion have any impact on campaign data?

This shouldn't have any impact. The Student List, like any Advanced Search filters used, is only initially relevant for helping query the list of students you want to be a part of the campaign.   Once they have been added to the campaign how they were added (category, list, filter) does not matter so changes to Student Lists would not impact campaigns that have already been built/executed.

*What happens if I select the **Do not show this list in analytics dashboards** checkbox?*

The Student List would not show in any analytics dashboard to anyone, including you. This can be helpful for Student Lists created for sensitive reasons, e.g. a list of students to refer to counseling. However, in most cases, you do not need to select the box.