

Navigate360 Student Lists Instructions

Updated on 1.23.26

What: Student Lists are static lists of students by student ID or alternate ID.

Where: Student Lists are used throughout Navigate360 Staff. This includes: user profiles of staff or faculty who have created a Student List; the **List and Searches** page; in Advanced Search and Report filters; and in Intervention Effectiveness filters.

Who: Student Lists are for student success staff and faculty who work to support student success efforts. They can also be useful tools for leaders at your institution to track information about a group of students.

Conditions: Student Lists are used in **Staff Workflows & Automations** for faculty and staff to track lists of students for outreach. They also serve an important role within the **Intelligence** module, where they can be used to pull reports on a key population of students or track their outcomes over time.

Feature Overview

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](#) or [Survey Campaigns](#) directly from the Student List.

Student Lists are NOT the same as [Saved Searches](#). 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.

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. (Campus-Semester-Short Name-First Initial- Last Name)

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**. Note that student list names must be 32 characters or less.

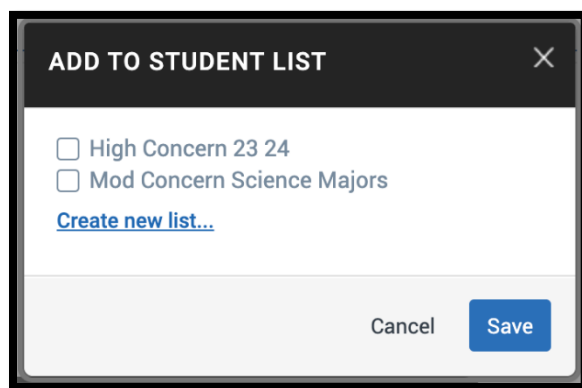


You have a static list of students that will not change over time.

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, **the 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. This allows you to manage which list or lists you would like your selected students to remain on. Then, 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 Navigate360 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 Navigate360 Staff.
2. Select **Upload Student List** from the **Actions** menu in the Student Lists section of the page as shown in the following image.

Student Lists

Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.

Actions ▴

[Rename](#)
[Delete](#)
[Upload Student List](#)

[New Student List](#)

		VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input type="checkbox"/>	Pell Eligible GPA	Yes	309
<input type="checkbox"/>	Murky Middle	Yes	4
<input type="checkbox"/>	At Risk Spring 2017	Yes	97

Upload Student List in Actions Menu

- Add students to an existing list OR create a new list.
- Select the CSV file and click **Upload**.
- 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.

Options

I want to...

[Message Student](#)
[Add a Note on this Student](#)
[Add a To-Do to this Student](#)
[Report on Appointment](#)
[Create Request for Appointment](#)
[Schedule an Appointment](#)
[Add to Student List](#)
[Issue an Alert](#)
[Edit User Settings](#)
[Upload Profile Picture](#)
[Impersonate User](#)

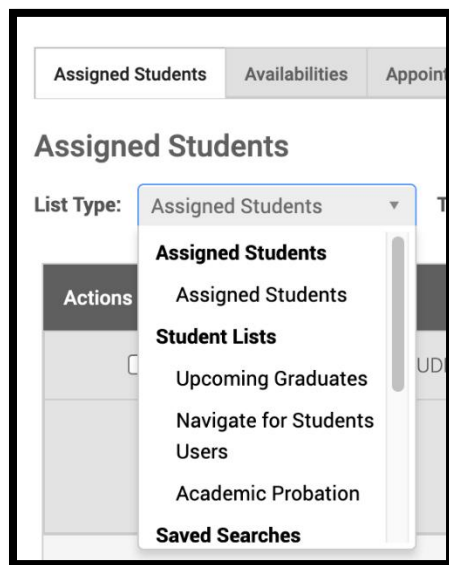
Choose which Student List or Lists to add the student to, or create a new Student List and add the student to it.

Using Student Lists in Navigate360 Staff Workflows & Automations and Reporting & Analytics

After creating a Student List, you can access them from the following areas in Navigate360.

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			
Student Lists are static lists of students by student ID. Even as student information changes, the list of students will remain the same. Use Student Lists to track information about a group of students.			
Actions ▾			New Student List
<input type="checkbox"/>	NAME	VIEWABLE IN ANALYTICS?	# OF ACTIVE STUDENTS
<input type="checkbox"/>	Mod-Concern-Science-Majors	Yes	391
<input type="checkbox"/>	High Concern 23-24	Yes	10

After opening a Student List, you can modify, delete, or save a different version of the Student List. You can also mark a list as *Do not show this list in analytics dashboards*. When you do this, the Student List will 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.

Back to users lists				
Mod-Concern-Science-Majors ✎				
<input type="checkbox"/> Do not show this list in analytics dashboards ?				
Actions ▾				Add Student...
<input type="checkbox"/>	NAME	ID	PREDICTED CONCERN	CATEGORY
1. <input type="checkbox"/>	Adams, Richard	87164329	Moderate	Adult learner,Applied for graduation,Honors student,Intends to start new career
2. <input type="checkbox"/>	Ader, Jon	59208631	Moderate	Minor - Art History,Trio Success Coach
3. <input type="checkbox"/>	Albee, Brian	34968720	Moderate	Applied for graduation,Minor - History,Trio Success Coach
4. <input type="checkbox"/>	Alexander, Mary	62093174	Moderate	Adult learner,Minor - Psychology,Sport - Womens Soccer
5. <input type="checkbox"/>	Amigon, Russell	63807215	Moderate	Academic Probation,Honors student,Minor - Economics
6. <input type="checkbox"/>	Anderson, Christopher	71864903	Moderate	Academic Probation,North Hall,Pell-Eligible
7. <input type="checkbox"/>	Anderson, Joseph	98261470	Moderate	Intends to start new career,Minor - Philosophy,Sports In-Season
8. <input type="checkbox"/>	Andrews, Tina	06598372	Moderate	Attended impact forum,Childcare dependent,Commuter student,Minor - Anthropology,Sport - Womens Soccer,Whitehurst U Prospect
<div> Previous <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> Next </div> <div>391 total results</div>				

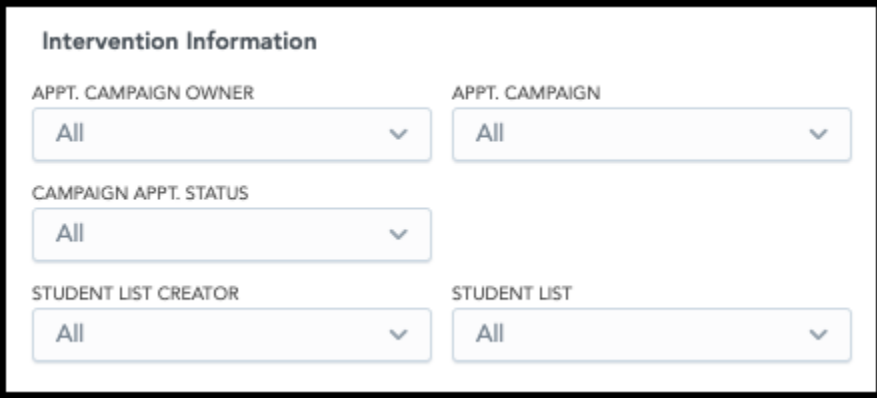
Advanced Search

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.

Student Information				
First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List				
First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	Race or Ethnicity	Student List (In Any of These)		Transfer Student
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
E-mail(s)	Category (In Any of these)?	<input type="text"/>		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Tag (In Any of these)?		<input type="text"/>		
<input type="text"/>		<input type="text"/>		

Intervention Effectiveness (Users Need Advanced Access to Use This Feature)

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.



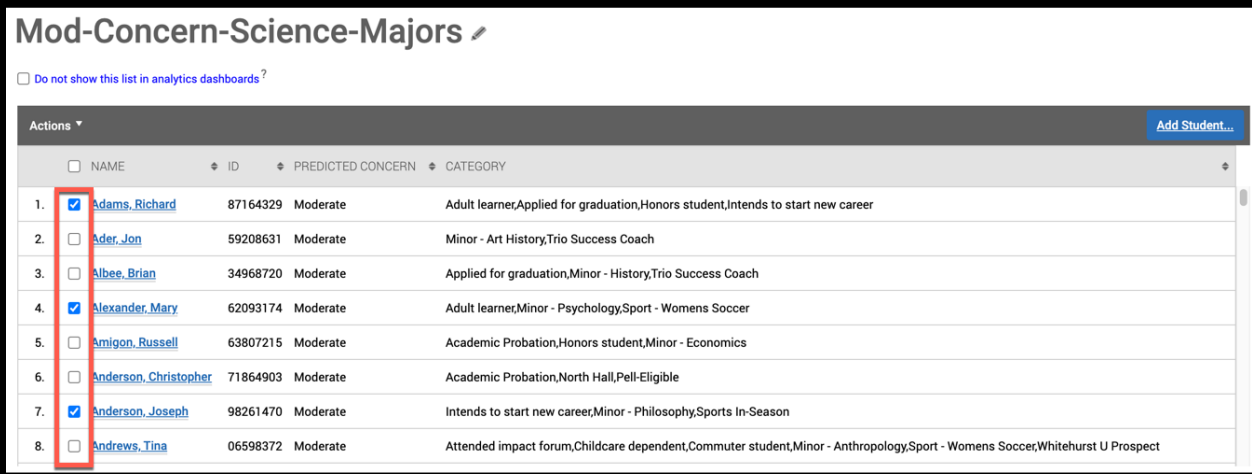
The image shows a form titled "Intervention Information" with five dropdown menus, all currently set to "All". The dropdowns are arranged in two columns. The first column contains "APPT. CAMPAIGN OWNER", "CAMPAIGN APPT. STATUS", and "STUDENT LIST CREATOR". The second column contains "APPT. CAMPAIGN" and "STUDENT LIST".

Note. Intervention Effectiveness is developed in a separate application from the rest of the Navigate360 platform. Data from Navigate360 loads into Intervention Effectiveness nightly. After you have created or updated a Student List in Navigate360, please allow one day for it to appear in Intervention Effectiveness.

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:

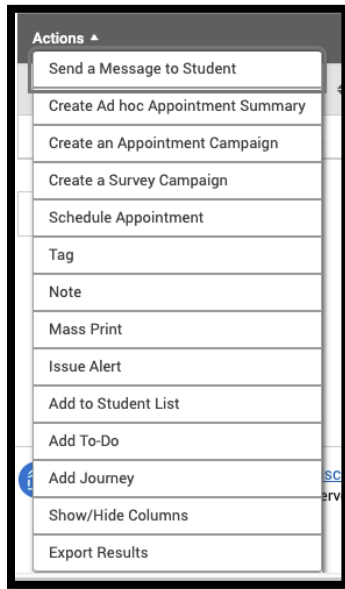
1. Open a Student List via the 'Lists & Saved Items' tab.
2. Select the boxes next to the students you want to take action on.






The screenshot shows a table titled "Mod-Concern-Science-Majors" with a red box highlighting the first column of checkboxes. The table has columns for NAME, ID, PREDICTED CONCERN, and CATEGORY. The first column contains checkboxes for each row, with some already checked. A blue button "Add Student..." is visible in the top right corner of the table area.

	NAME	ID	PREDICTED CONCERN	CATEGORY
1.	<input checked="" type="checkbox"/> Adams, Richard	87164329	Moderate	Adult learner,Applied for graduation,Honors student,Intends to start new career
2.	<input type="checkbox"/> Ader, Jon	59208631	Moderate	Minor - Art History,Trio Success Coach
3.	<input type="checkbox"/> Albee, Brian	34968720	Moderate	Applied for graduation,Minor - History,Trio Success Coach
4.	<input checked="" type="checkbox"/> Alexander, Mary	62093174	Moderate	Adult learner,Minor - Psychology,Sport - Womens Soccer
5.	<input type="checkbox"/> Amigon, Russell	63807215	Moderate	Academic Probation,Honors student,Minor - Economics
6.	<input type="checkbox"/> Anderson, Christopher	71864903	Moderate	Academic Probation,North Hall,Pell-Eligible
7.	<input checked="" type="checkbox"/> Anderson, Joseph	98261470	Moderate	Intends to start new career,Minor - Philosophy,Sports In-Season
8.	<input type="checkbox"/> Andrews, Tina	06598372	Moderate	Attended impact forum,Childcare dependent,Commuter student,Minor - Anthropology,Sport - Womens Soccer,Whitehurst U Prospect

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



Send a Message to Student	Opens a Send a Message dialog. User can send an email or text message (with or without an attachment) to the students selected.
Create Ad Hoc Appointment Summary	Create an appointment summary report for the selected students to record an appointment with them.
Create an Appointment Campaign	Create an appointment campaign starting with the students added.
Create a Survey Campaign	Create a survey campaign with the selected students as recipients.
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 (Only Application Administrators can create/add tags)	Allows users to select tags to add to the student's profile.

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	<p>Opens the Issue Alert dialog and marks a student at-risk.</p> <p>Important. This action can only be used for one student at a time.</p> <p>Add to Student List</p> <p>Add students to another Student List</p> <p> : Means all selected students are on that list.</p> <p> : Means some of the selected students are on that list</p> <p> : (blank square) Means the selected students are not on that list.</p>
Remove From Student List	Removes the selected students from the current list.
Add To-Do	Adds staff to-dos for the selected students from current list.
Add Journey (New Feature, More Info To Come!)	Assigns the selected students to a Journey.
Export Results	Create 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.

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.

Navigate360 Saved Search Instructions

What: Saved searches lets users run a pre-configured Advanced Search without having to create the search again. They can be used with Automated Actions.

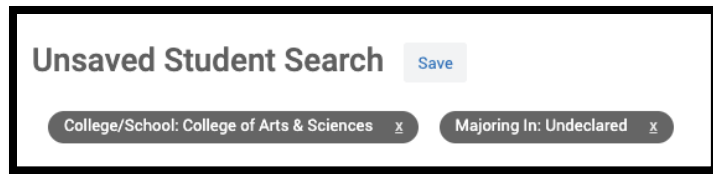
Where: Saved searches are on the Lists & Saved Items page. They are created via the Advanced Search feature.

Conditions: Users need, at a minimum, the View the Search Page and Search for Students permissions. They should also have access to Advanced Search.

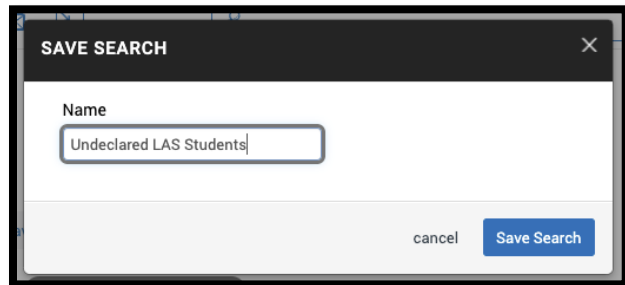
Feature Overview

Saved searches let users run a pre-configured Advanced Search without having to create the search again. Unlike [Student Lists](#), which save a static list of the same students, a saved search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters

Create a saved search in [Advanced Search](#). After selecting your search parameters and running the search, click the Save button.



You are then asked to name your search. (Campus-Semester-Short Name-First Initial- Last Name)



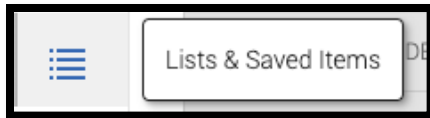
Click Save Search.

Note. Students in the initial saved search will change as their data changes. For example, if a student switches majors from Biology to Chemistry, they would no longer appear for a saved search looking for Biology majors.

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](#).

Saved searches are accessible in several places in Navigate360 Staff.

1. Staff Home Page. Clicking My Assigned Students on the Staff Home page pulls up not only lists of your assigned students by term, but also any saved searches or student lists you created.
2. Lists and Saved Items. This page aggregates all your student lists and saved searches and reports. You can also create a new saved search on this page by clicking the New Saved Search button, which directs you to Advanced Search.

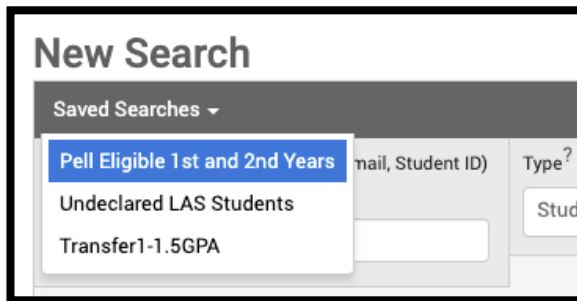


Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

Actions ▾		New Saved Search
<input type="checkbox"/>	NAME	USED IN AUTOMATION
<input type="checkbox"/>	Transfer1-1.5GPA	No
<input type="checkbox"/>	Pell Eligible 1st and 2nd Years	Yes
<input type="checkbox"/>	Undeclared LAS Students	No

3. Advanced Search. Any saved search is accessible on the Advanced Search page.



Saved searches let you **take action** on students flagged once you've run the search and results are available.