

Identifying Specific Student Populations



Help Center Manager

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Introduction: Use the searches and student list features in Navigate as an opportunity to segment out specific populations of students for targeted interventions, outreach, and support. There are three features tied to this in particular: Advanced Search, Saved Advanced Searches, and Student Lists.

The Advanced Search and Saved Search functionality in Navigate allows advisors, faculty, and administrators to layer a series of filters onto a specific query. With a nearly infinite number of possible combinations, Advanced Search helps to customize searches so that users are empowered to identify specific groups of students on campus and evaluate these students' unique needs. Some ways to use Advanced Search and saved Advanced Searches include:

- Search to identify students that are associated with a specific group (category, tag) on campus that have completed specific milestones
- Find students that were enrolled in a past semester but are not enrolled in the current semester. These students might benefit from a second look to determine why they did not persist.
- Faculty might use it to see students that are currently enrolled in majors within the department they oversee.
- Advisors might search for students within a GPA range so that they can run targeted advising campaigns.
- Advisors might search for students that have earned credits within a specific range to identify students who are nearing graduation to remind them about any graduation-related applications.
- Advisors might search for students who have registered for a specific course in a previous or current semester to identify who have not yet registered for an important required course for a given major.

Student Lists are a static group of students that you can continually monitor over time. Student Lists do not change, even if students no longer fit the criteria of the original search. They are useful for identifying a list of students, taking action on them later, or selecting subsets of students from searches for later use to save time and effort.

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Using Advanced Search to Find Students

Advanced Search allows you to search for all students on campus while applying multiple filters to create unique cohorts of students based on your search parameters.

To use Advanced Search, select the "magnifying glass" icon on the left side of your screen as highlighted in the image below:



From here, you may begin to create a search from the fields immediately presented:

New Search

Saved Searches - Show Advanced Filters

Keywords (First Name, Last Name, E-mail, Student ID)?

Type? Students

My Students Only Include Inactive

However, selecting the **Show Advanced Filters** button presents you with 10 different drawers to begin searching by:

New Search

Saved Searches ▼ Show Advanced Filters

Keywords (First Name, Last Name, E-mail, Student ID) Type

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Watch List ▼

Enrollment History Enrollment Terms ▼

Area of Study Degree, Major ▼

Performance Data GPA, Hours, Credits ▼

Term Data Classification, Section Tag, Term GPA ▼

Course Data Course, Section, Status ▼

Assigned To Advisor ▼

Goals & Interests Post Degree Goal, Favorites ▲

Post Degree Goal (In Any of these) Favorite Fields (In Any of these) Favorite Majors (In Any of these)

Search My Students Only Include Inactive

You will want to be mindful of which term's data you are searching by. You may change term data through either **Enrollment Term** or by using the **Term Selector** at the top of your page.

Toggling different options under each section will alter the list of students you receive when the search is run. Since there are thousands of possible permutations, we will use an example: **All Accounting Majors between a 2.00 - 3.00 GPA:**

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List ▼

Area of Study College/School, Degree, Concentration, Major ▲

College/School (In Any of These) Concentration (In Any of These) Degree (In Any of These)

Major (In Any of these)

Performance Data GPA, Hours, Credits ▲

Min. Cumulative GPA Max. Cumulative GPA

Min. Credits Earned Max. Credits Earned Min. Hours Attempted Max. Hours Attempted Min. Credit Comp. % Max. Credit Comp. %

Fall Semester 2016 Data Classification, Section Tag, Term GPA ▼

Course Data Course, Section, Status ▼

When you've refined your search parameters to reflect the student cohort you wish to find, select **Search** at the bottom of the page. You will receive a list of students that match your parameters:

Unsaved Student Search Save

Saved Searches ▾

Standard User Type: student Enrolled in Summer Semester 2016 Majoring In: Accounting Min. Cumulative GPA: 2.00 Max. Cumulative GPA: 3.00

Actions ▾

<input type="checkbox"/> ALL	NAME	ID	WATCH LIST	CUM. GPA	MAJOR	PREDICTED RISK LEVEL	CLASSIFICATION	CATEGORY	ACTIONS
<input type="checkbox"/>	1 Adkerson, Botolf	928257345	<input type="checkbox"/>	2.24		High			Edit - impersonate
<input type="checkbox"/>	2 Campese, Dionte	925566513	<input type="checkbox"/>	2.66		High			Edit - impersonate
<input type="checkbox"/>	3 Chukes, Hova	900908870	<input type="checkbox"/>	2.79		Moderate			Edit - impersonate
<input type="checkbox"/>	4 Donnelly, Nasya	386934586	<input type="checkbox"/>	2.19		Moderate			Edit - impersonate
<input type="checkbox"/>	5 Gauß, Masen	143664958	<input type="checkbox"/>	3.00		High			Edit - impersonate
<input type="checkbox"/>	6 Gravert, Britta	781462912	<input type="checkbox"/>	2.72		Moderate			Edit - impersonate
<input type="checkbox"/>	7 Gulla, Talynn	059108841	<input type="checkbox"/>	2.66		Low			Edit - impersonate

Previous 1 Next

From here, you may either **Take Action through the Actions menu** with one, several, or all of the students on this list, or you may **Save your Search**. To save a search, next to where it says **Unsaved Student Search**, click on the **Save** button, **name your search**, and then select **Save Search** to save the parameters you already entered for future use.

Additional Filters

My Students Only - Search only students assigned to you. Advisor assignments can be direct, one-to-one assignments or indirect major or category assignments. Tutors most commonly have direct, one-to-one student assignments. Students are assigned to professors based on their course rosters.

Include Inactive - By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

Using a Saved Search

After searching for and retrieving a list of students, you can save the search parameters you used so you may quickly re-run the same search without needing to manually enter in the parameters every time.

Note: Because the platform saves the search parameters, not the list of students, your list of students may shift if they no longer meet your parameters. If you wish to save the students whether or not they meet the search parameters, they will need to be added to a Student List.

To save a search, click on the button **Save** above your list of students. It's at the top of the search, next to the title "Unsaved Student Search":

Unsaved Student Search Save

Saved Searches ▾

Standard User Type: student Enrolled in Summer Semester 2016 Majoring In: Accounting Min. Cumulative GPA: 2.00 Max. Cumulative GPA: 3.00

Search Modify Search

Actions ▾

<input type="checkbox"/> ALL	NAME	ID	WATCH LIST	CUM. GPA	MAJOR	PREDICTED RISK LEVEL	CLASSIFICATION	CATEGORY	ACTIONS
<input type="checkbox"/>	1 Adkerson, Botolf	928257345		2.24	Accounting	High	Senior	Debate team	Edit + Impersonate
<input type="checkbox"/>	2 Campese, Dante	925566513		2.66	Accounting	High	Senior	Debate team	Edit + Impersonate
<input type="checkbox"/>	3 Chukes, Hova	900908870		2.79	Accounting-Finance	Moderate	Senior	Debate team	Edit + Impersonate
<input type="checkbox"/>	4 Donnelly, Nasya	386934586		2.19	Accounting	Moderate	Junior	Debate team	Edit + Impersonate

After you click **Save**, you will be asked to **name your search**. We recommend you are as specific as possible, as in the following example:

SAVE SEARCH ×

Name

ACCT Majors 2.00-3.00

cancel Save Search

Once named, click **Save Search**.

You have saved the search parameters from the advanced search you just ran. The students you see on this list might change as their attributes change. For example, in the search above for Accounting Majors between a 2.00-3.00, if Botolf Adkerson switches majors, he will no longer appear on my list when I re-run this search. **Saving Searches always returns a list of the students that meet your search parameters, it does not save the students themselves.** As mentioned above, to save the students themselves, you will need to create a student list.

Once you've created a **Saved Search**, there are several areas within Navigate you may access them.

Home Page

The first place will be your home page. By clicking on **My Assigned Students For (Current Term)**, you will be able to select from any of your saved searches or student lists to display on your home screen.

Any time you select one of your Saved Searches, it will automatically run a search to give you the most up-to-date list.

Lists and Searches Tab

Your Student Lists and Saved Searches also have their own tab. You may find it under the Navigation Menu as "Lists and Searches":



Under this menu, you may access your saved searches and student lists. Additionally, you may create new lists from this page as well.

Student Lists

Actions ▾		New Student List
<input type="checkbox"/>	NAME	# OF STUDENTS
<input type="checkbox"/>	Test 7.24.2018	0

Saved Searches

Actions ▾		New Saved Search
<input type="checkbox"/>	NAME	
<input type="checkbox"/>	Philosophy Majors	

You can access any of your previous saved searches to run from the Advanced Search filters as well.

You can also take action on students in a saved search once you open it. The actions are described below.

- **Send Message:** Opens a “Send a Message” box that allows user to send an email or text message (with or without an attachment) to the students selected.
- **Create Appointment Summary:** Creates an appointment summary report for each student added.
- **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. **NOTE:** 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. **NOTE:** Choosing this action does not allow user to create new tags.
- **Note:** Adds a note to the student’s 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 box](#) and marks a student at-risk.
- **Charity/Study Hall:** Adds time that student has spent in Study Hall to their information on the

platform.

- **Add to Student List:** Adds the students to a Student List.
- **Export Results:** Creates a CSV file of students that downloads to your computer and can be used with other systems.

Creating and Using Student Lists

In the event you wish to save a list of students and do not necessarily care about their attributes, you will want to create a Student List. A student list is a static group of students that you can continually monitor over time.

To create a student list, run your Advanced Search and return a list of students. Once you have your list, select all students you wish to add by selecting the gray box next to their name, or by selecting the entire list by clicking on the gray **All** box. After selecting your students, click on the **Actions Menu**:

Actions ▾										
<input checked="" type="checkbox"/> ALL	NAME	ID	WATCH LIST	CUM. GPA	MAJOR	PREDICTED RISK LEVEL	CLASSIFICATION	CATEGORY	ACTIONS	
<input checked="" type="checkbox"/>	1	Adkerson, Botolf	928257345	<input type="checkbox"/>	2.24	Accounting	High	Senior	Debate team	Edit - impersonate
<input checked="" type="checkbox"/>	2	Campese, Donte	925566513	<input type="checkbox"/>	2.66	Accounting	High	Senior	Debate team	Edit - impersonate
<input checked="" type="checkbox"/>	3	Chukes, Hova	900908870	<input type="checkbox"/>	2.79	Accounting-Finance	Moderate	Senior	Debate team	Edit - impersonate
<input checked="" type="checkbox"/>	4	Donnelly, Nasya	386934586	<input type="checkbox"/>	2.19	Accounting	Moderate	Junior	Debate team	Edit - impersonate
<input checked="" type="checkbox"/>	5	Gaub, Masen	143664958	<input type="checkbox"/>	3.00	Accounting	High	Senior	Debate team	Edit - impersonate

From here, select **Add to Student List** at the bottom of the list:

Actions ▲
Send Message
Create Appointment Summary
Appointment Campaign
Schedule Appointment
Tag
Note
Mass Print
Issue Alert
Charity
Add to Student List
Export Results
Show/Hide Columns
Previous Next

You may either add students to an existing Student List or you may select **Create New List**.

Once you name your list, click **Save**. You have saved a static list of students that will not change over time.

After creating a Student List, you can reopen them for later use. You can also edit or delete your Student List at any time. You can also use them with Advanced Searches. You may select one or more student lists as a search filter in the Student Information drawer.

To Open a Student List

1. Click the Lists & Searches icon.
2. Scroll down to the Student List box.
3. Click the name of the Student List you want to open.
4. You can modify, delete, or save a different version of the Student List from this screen.

At Risk Spring 2017

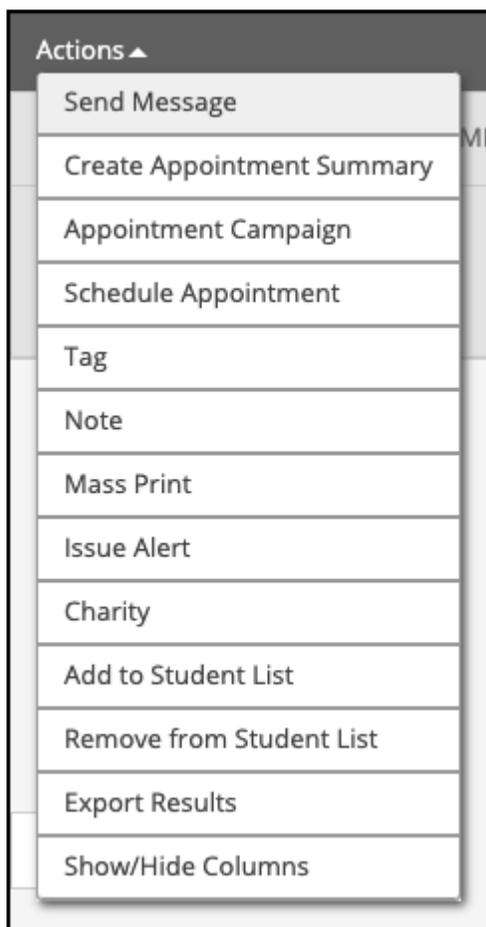
Actions ▾ Add Student...

<input type="checkbox"/>	STUDENT NAME	ID	CONCERN	CATEGORY
<input type="checkbox"/>	1 Achiger, Camila	732079886	High	
<input type="checkbox"/>	2 Askan, Imani	899402625	High	Basketball, Rock Climbing Club
<input type="checkbox"/>	3 Atteberry, Guadalupe	131491742	Unknown	
<input type="checkbox"/>	4 Averbeck, Vilho	141001885	Unknown	
<input type="checkbox"/>	5 Beldenbaugh, Casey	137300693	Unknown	
<input type="checkbox"/>	6 Beers, Pete	238231834	High	
<input type="checkbox"/>	7 Blacklock, Kella	371528326	High	Lacrosse
<input type="checkbox"/>	8 Bonney, Kaden	109132146	Unknown	

Previous 1 Next 97 total results

Using the Actions Menu with Student List

1. Open a saved search as described above.
2. Click the box or boxes next to the student you want to take action on.
3. Open the Actions menu and select one.

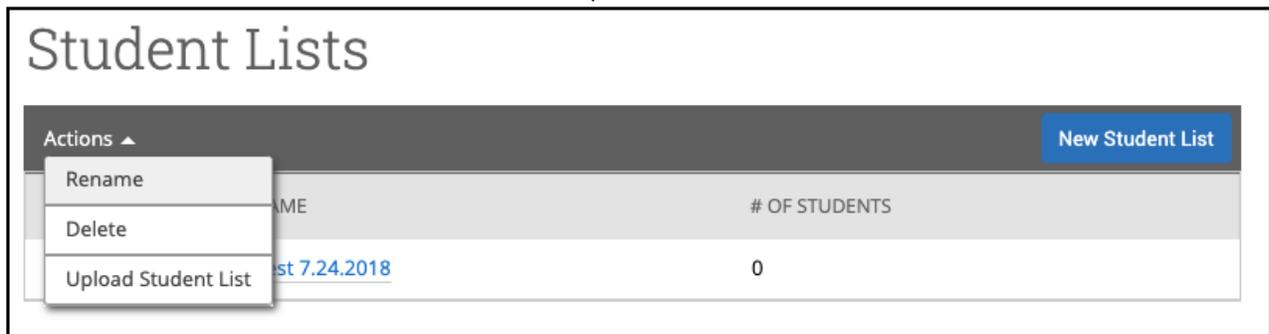


Upload Excel Lists to Create Student Lists

Many users upload Excel lists into the platform to create student lists. This includes people exporting lists of students from our Population Health Dashboards. Note that the Excel file must be a .CSV to be uploaded.

To Upload an Excel List

1. Navigate to the Lists and Search page.
2. In the Actions menu of Student Lists, select Upload Student List.



3. Create a new Student List or add the students in your list to an existing student list.
4. Select the file and upload it.
5. Choose the column that represents Student ID and then finish the import.

Frequently Asked Questions

How does historical data appear in Advanced Search?

The Navigate platform is not designed for comprehensive historical data searches and to understand the breadth of data available for running historical searches to implement strategic campaigns at your campus, please contact your Strategic Leader to see the time frame that you can use in your searches. For true historical data reporting, please refer to the Institutional Reports.

Can I use Advanced Search to run historical searches?

No. While historical data may be in your advanced searches, it is not a tool to analyze historical data. To analyze historical data in the platform, please use Institutional Reports.

What is the impact of the global term filter in Advanced Search?

The global term filter impacts the ability to see student's Classification, GPA, and assigned Categories in the current term. It should not impact the results (# of students per filters applied), however will determine the additional student information shown in the results.

For example – if you were to choose a term filter outside of the current term, the student's Classifications/Categories/etc. would likely not appear.

Related Articles

- [Strategic Care - Advanced Search](#)
- [Strategic Care - Student Lists](#)
- [Strategic Care - Saved Search](#)
- [Intelligence - Population Health Dashboard](#)
- [Strategic Care - Tags](#)
- [Categories Administration](#)

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