Navigate Training Guide #5: Advanced Search and Student Lists

Topics Covered:
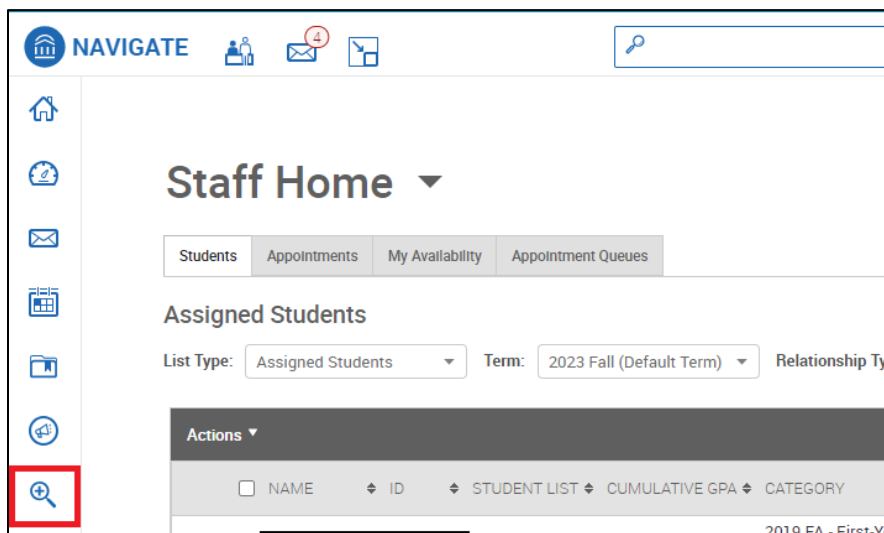
- Advanced Search
- Student Lists

1. Advanced Search

Advanced Search lets users create their own data queries based on various criteria. It is an easy way to identify cohorts of students. Employees must have an administrative role to access Advanced Search; the Professor role alone does not grant access.

PLEASE NOTE: ADVANCED SEARCH IS NOT A HISTORICAL SEARCH TOOL. NAVIGATE ADVANCED SEARCH IS INTENDED TO BE USED TO IDENTIFY AND INTERACT WITH CURRENT STUDENTS. STUDENTS WHO DO NOT HAVE AN ACTIVE RECORD IN CUNYFIRST (INCLUDING GRADUATES) MAY NOT SHOW IN SEARCH RESULTS.

To access Advanced Search, click on the search tool icon on the left of the screen:

On the Advanced Search page there are a variety of search criteria available:


- The **Keywords** field is used to search by name or ID. One useful feature of this field is the ability to copy and paste CUNY IDs from an excel file directly to the field.
- Click on the search criteria categories to specify the details of your search:

- Note that Advanced Search uses different logic statements to build queries. Some search fields will have multiple logical choices to apply to the criteria:
  - **AND:** If the field states "In All of these" it is an **AND** field. Students must meet every criterion chosen to be included.
  - **OR:** If the field states "In Any of these" it is an **OR** field. Students must only meet one of the criteria to be included.
  - **NULL:** If the field states "In None of these" it is a **NULL** field. Any student who meets any of the selected criteria will not be included.
- The **Student List** field, in the **Student Information** category, is an important search field. This lets you use a file you uploaded to Navigate as the basis of your search. You can then refine your search with additional criteria as needed. Creating Student Lists will be covered in the next section of this guide.
- We recommend that you always use the **Enrollment Term** field with one or more specific semesters entered (generally the current or next semester). This guarantees

that your results will hold only students who registered for classes in the semester you enter.

- After generating the results, click on the **Actions** bar to interact with the selected students from your list:
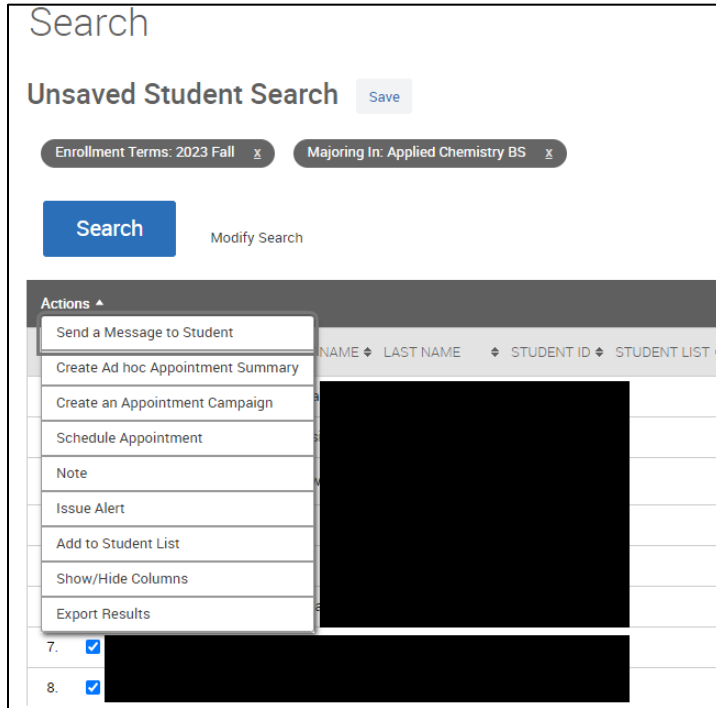
- Click the Save button next to **Unsaved Student Search** to save any set of search terms you would like to run again in the future.

2. 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 the basis of a more complex query, to sending messages or Appointment Campaigns directly from the Student List. To access the student lists page, click on the list icon on the left of the screen:

On this page you can upload a new student list, as well as view existing saved lists and advanced searches.

To add a new list:

- Click the **Actions** bar and select **Upload Student List**.
- On the next page choose New Student List and then enter your list name and click confirm:

- Then upload the spreadsheet, which must be in CSV format. It must have a column of CUNY ID numbers, which you will identify after uploading the file.

Select a Student List	Upload	Choose a Column

Upload File to Student List

You've uploaded spring_2023_cases.csv Choose a column to import as Student ID:

ID ⌄   Save