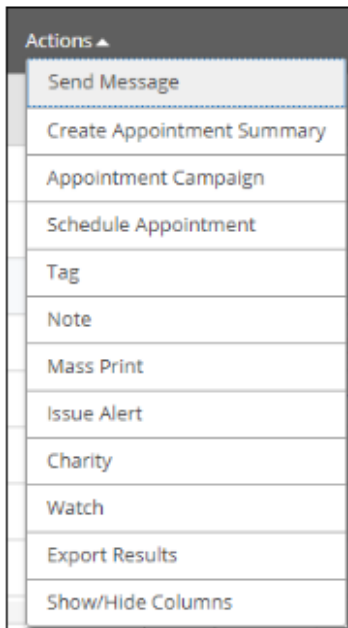# Creating Watch Lists

A Watch List is a static list of students you would like to track over time. You will find Watch Lists and Saved Searches under this icon in the left menu. Click on New Watch List to create a list. Name the Watch List. When naming Watch Lists, include anything to help identify the qualities of the list. For example: USAL Fall 2019 for "All Undecided students enrolled for fall 2019"

<u>There are three ways to create a Watch List:</u>

Option 1 - Create Watch List or add student through Advanced Search

Navigate to Advanced Search and find a population of students through the filters. Once the list of students has populated, select all students you wish to add to the Watch List 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:

1. From here, select Watch at the bottom of the list:
2. You may either add students to an existing Watch List or you may select Create New List.
3. Once you name your list, click Save. You have saved a static list of students that will not change over time.

Actions ▲
Send Message
Create Appointment Summary
Appointment Campaign
Schedule Appointment
Tag
Note
Mass Print
Issue Alert
Charity
Watch
Export Results
Show/Hide Columns

Option 2 -Upload Watch List from a list of Student ID's

You can also upload a list of students into the platform from Excel to create Watch Lists. Note that the Excel file must be in a Comma Separated Values (.csv) format.

1. Open Navigate Staff.
2. Navigate to the Lists and Search page.
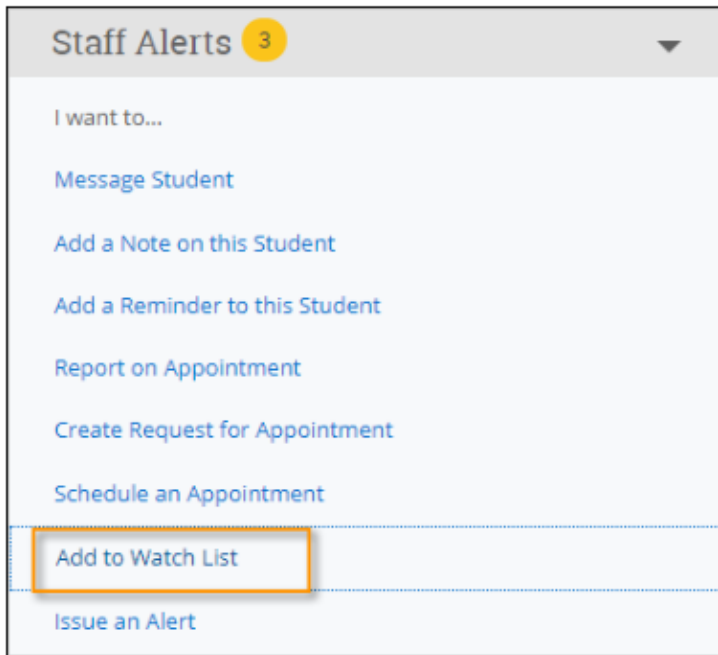3. In the **Actions** menu of Watch Lists, select **Upload Watch List**.
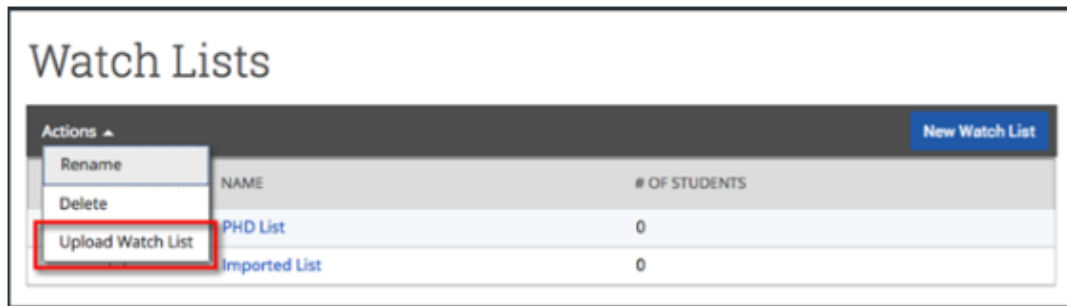
Upload Watch List in Actions Menu

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

Note: You must ensure that the column containing the student IDs in the .csv file is expanded (i.e., the column must be wide enough to display the entire ID), or the system cannot read it correctly.

Option 3- Add Students To Watch List from Student Profile

On the right-hand side of the student profile page in Navigate, use the Actions box to select the "Add to Watch List" button.

Staff Alerts 3

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report on Appointment

Create Request for Appointment

Schedule an Appointment

Add to Watch List

Issue an Alert

From here, you can choose which Watch List or Watch Lists to add the student to, or you can create a new Watch List and add the student to it.