



QC NAVIGATE ADVANCED SEARCH

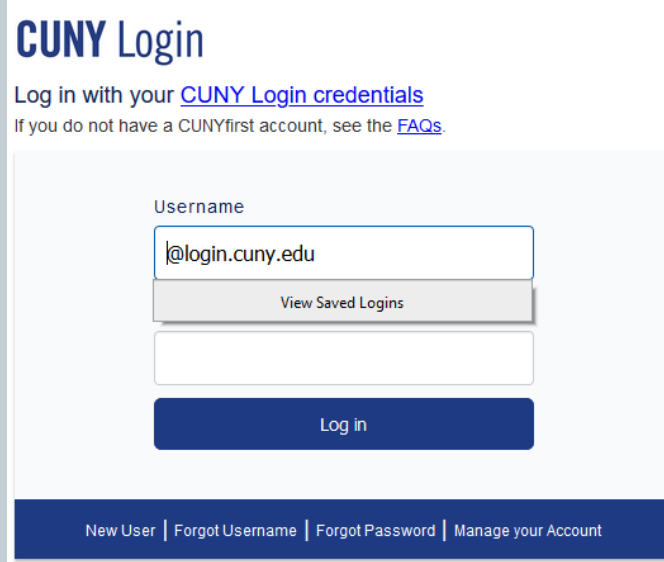
How to use QC Navigate to select a group of students and send them a message

PROTECTING STUDENTS' PRIVATE INFORMATION

- As with CUNYfirst, you have access to FERPA-protected information
- Be sure to keep student education information secure
- Read more here:
 - Federal FERPA policy: <https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html>
 - CUNY FERPA policy: <https://www.cuny.edu/wp-content/uploads/sites/4/page-assets/about/administration/offices/legal-affairs/policies-procedures/FERPA-2.pdf>

GETTING READY

- INTERNET BROWSER: CHROME, MICROSOFT EDGE ARE BEST, FIREFOX also works well. Avoid Internet Explorer
- TEST YOUR CUNYfirst CREDENTIALS
 - Also known as: CUNY credentials, these are different from your QC credentials
 - QC Navigate credentials are the same as those you use for CUNYfirst
 - If you don't know these credentials or cannot remember the password, you have to go to the CUNYfirst log in page - <https://cunyfirst.cuny.edu> - to reset them
 - Your CUNY username is [firstname.lastnameXX@login.cuny.edu](#) (where XX are the last 2 digits of your CUNY ID (emplid)).

A screenshot of the CUNY Login page. The page has a white background with a blue header. The header contains the text "CUNY Login" in a large, bold, blue font. Below the header, there is a link "Log in with your CUNY Login credentials" and a link "If you do not have a CUNYfirst account, see the FAQs." Below these links, there is a form with a "Username" label, a text input field containing "@login.cuny.edu", a "View Saved Logins" button, a password input field, and a "Log in" button. At the bottom of the page, there is a dark blue footer with white text links: "New User", "Forgot Username", "Forgot Password", and "Manage your Account".

CUNY Login

Log in with your [CUNY Login credentials](#)
If you do not have a CUNYfirst account, see the [FAQs](#).

Username

@login.cuny.edu

View Saved Logins

Log in

[New User](#) | [Forgot Username](#) | [Forgot Password](#) | [Manage your Account](#)

LOGGING IN TO QC NAVIGATE

- LOG IN PAGE: <https://qc-cuny.campus.eab.com/>
- Note that you do not need to type “@login.cuny.edu” – just [firstname.lastnameXX](#)



Web Applications Login

If you are logging into a University cloud service offering, such as Dropbox or Microsoft Office 365 for Education, you agree to abide by the terms in the [CUNY Acceptable Use of University Data in the Cloud policy](#).

Log in with your [CUNY Login credentials](#):

Username

Password

Login

[> Forgot Password](#) [> New User](#)
[> Forgot Username](#) [> Manage your Account](#)

PROTECT YOUR PERSONAL INFORMATION AND PRIVACY

ONLY enter your CUNY Login password on CUNY Login websites (ssologin.cuny.edu and login.cuny.edu). NEVER share it with others or enter your CUNY Login password elsewhere without the approval of



Web Applications Login

If you are logging into a University cloud service offering, such as Dropbox or Microsoft Office 365 for Education, you agree to abide by the terms in the [CUNY Acceptable Use of University Data in the Cloud policy](#).

Log in with your [CUNY Login credentials](#):

Username

cheryl.littman80

Password

••••••••••

Login

[> Forgot Password](#) [> New User](#)
[> Forgot Username](#) [> Manage your Account](#)

PROTECT YOUR PERSONAL INFORMATION AND PRIVACY

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USE ADVANCED SEARCH TO GENERATE A LIST OF STUDENTS:

FOR EXAMPLE:
STUDENTS WHO HAVE NOT YET ENROLLED FOR THE NEXT SEMESTER. THEN SEND A COMMUNICATION TO NUDGE STUDENTS TO REGISTER FOR CLASSES

TARGET POPULATION: AN EXAMPLE



ADVANCED SEARCH

Choose the
Advanced
Search icon

The screenshot displays the NAVIGATE Staff Home interface. At the top, the NAVIGATE logo is on the left, and a search bar with a dropdown menu set to "2020 Summer" is on the right. The main content area is titled "Staff Home" and includes tabs for "Students", "Upcoming Appointments", "My Availability", and "Appointment Queues". Below these tabs is the section "My Assigned Students for 2020 Summer". A table header is visible with columns: "ALL", "STUDENT NAME", "ID", "WATCH LIST", and "CUMULATIVE GPA". The table body shows "No matching records found". A sidebar on the left contains various icons, with the magnifying glass icon for "Advanced Search" highlighted by a callout box. The right sidebar contains sections for "Actions" (with links "I want to..." and "Issue an Alert"), "Quick Links" (with links "Take me to...", "School Information", "Download Center for Reports", "Campaigns...", and "Appointment Campaigns"), and "Upcoming Appointments" (stating "You have no upcoming appointments."). The bottom of the page shows "Previous" and "Next" navigation links and "0 total results".

NAVIGATE

2020 Summer

Staff Home

Students Upcoming Appointments My Availability Appointment Queues

My Assigned Students for 2020 Summer

Actions

I want to...

Issue an Alert

Quick Links

Take me to...

School Information

Download Center for Reports

Campaigns...

Appointment Campaigns

Upcoming Appointments

You have no upcoming appointments.

Advanced Search

No matching records found

0 total results

ADVANCED SEARCH PAGE

Search



New Search

Saved Searches ▾

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

Type?

Students ▾

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

Enrollment History Enrollment Terms ▾

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

Term Data Classification, Section Tag, Term GPA ▾

Performance Data GPA, Hours, Credits ▾

Course Data Course, Section, Status ▾

Assigned To ▾

Goals & Interests Post Degree Goal, Favorites ▾

Academic Plan ▾

ADVANCED SEARCH: SEARCH FIELDS

- Organized by topic in accordion menus (click to expand)
 - **Student Information** – name, id, category, tag, race, “watch list”
 - **Enrollment History** – enrollment terms
 - **Area of Study** – major
 - **Term Data** – semester credits and GPA ranges, instructor, section tags
 - **Performance Data** – cumulative GPA and credit ranges
 - **Course Data** – courses and classes
 - **Assigned To** – advisor assignment (if assigned in CUNYfirst)
 - **Goals & Interests** – as identified by students on Navigate Student
 - **Academic Plan** – *not* major or program, this set of fields is not used at Queens College
 - **Surveys** – results from intake surveys and polls in Navigate Student
 - **Success Indicators** – *not currently used at QC (will be implemented in the future)*

ADVANCED SEARCH: TIPS

- Think carefully about how you want to “operationalize” the target population
- Use one or more fields to limit the search results
- Within accordion sections, BOOLEAN logic – AND/OR based on how search is specified
 - In Any (students must have any one or more – combines selections with “OR”)
 - In All (students must have all selections – combines selections with “AND”)
 - In None (excludes students with any of the selected values)
- Across accordion sections, filters act as AND conditions: Students who meet *all* criteria
- Complex searches are possible with some thought and experience
- Some levels of complexity cannot be handled; consider simplifying or using the message content to have students “self-select” on conditions that cannot be met with Advanced Search
- Check your results
- Save and modify
- Consider saving a “basic” search you can use as a template rather than starting from scratch each time
- Saved searches are stored on the Lists & Searches page



SEARCH EXAMPLE: DEPARTMENT MAJORS NOT ENROLLED FOR NEXT TERM

1. Expand the **Enrollment History** accordion section by clicking on it
 - Choose the current term (or use a previous or future term if that meets your needs)
2. Expand the **Area of Study** accordion section
 - Ignore the “College/School” field
 - **Major (In Any of these)** – select the majors or programs you are interested in.
 - Remember to choose the Macaulay Honors College version of the major
 - Some of these students will have more than one major
 - To *include* students with additional majors there nothing else to do
 - To *exclude* double majors you will need to add all other majors to Major (In None of the These) – not recommended
 - To select students with specific combinations of majors, use **Major (In All of these)**

SEARCH: DEPARTMENT MAJORS NOT ENROLLED FOR NEXT TERM

New Search

Saved Searches ▾

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

Type?

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

Enrollment History Enrollment Terms

Enrollment Terms (In Any of these)?

✕ 2020 Spring +

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

College/School (In Any of These)?

All

Major (In Any of these)?

✕ History BA ✕ History BAMA

✕ History Social Stud 7-12 BA

✕ MHC History BA

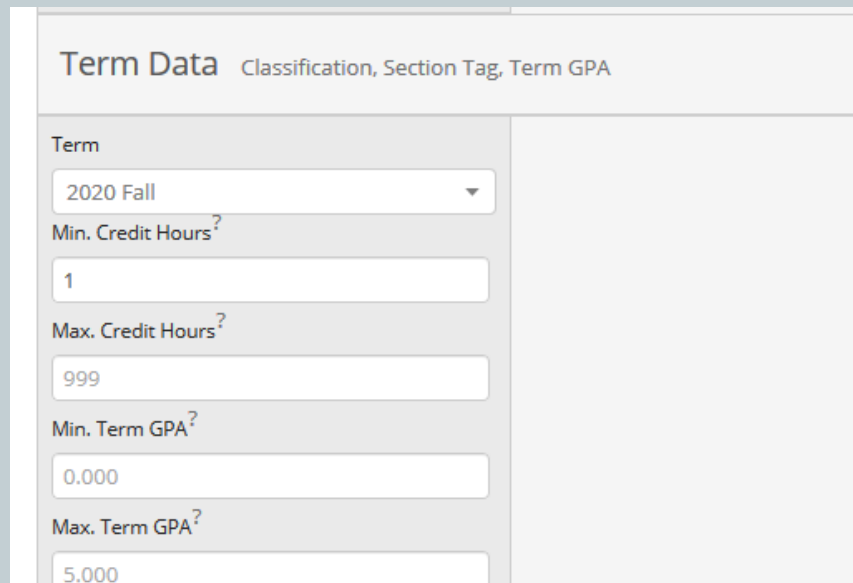
Major (In All of these)?

All

SEARCH: DEPARTMENT MAJORS NOT ENROLLED FOR NEXT TERM

3. Expand the **Term Data** section

- Select the value of Term to use as the CURRENT term (this is relative to the NEXT term selected earlier)
- Enter “1” in the Min. Credit Hours field – this will limit to students enrolled for credit-bearing courses



The screenshot shows a web form titled "Term Data" with a subtitle "Classification, Section Tag, Term GPA". The form contains several input fields:

- Term:** A dropdown menu with "2020 Fall" selected.
- Min. Credit Hours[?]:** A text input field containing the number "1".
- Max. Credit Hours[?]:** A text input field containing the number "999".
- Min. Term GPA[?]:** A text input field containing the number "0.000".
- Max. Term GPA[?]:** A text input field containing the number "5.000".

SEARCH: DEPARTMENT MAJORS NOT ENROLLED FOR NEXT TERM

4. Scroll to the bottom of the search topics and click the blue Search button
5. Select Save to keep a copy of a search with these parameters
 - Even if modifications are needed, it's best to save so you don't have to start from scratch to modify.
 - Once saved, select a few students at random to view their course history; you should see students with enrollment in the CURRENT term but not in the NEXT term

Search

REVIEW STUDENTS

- Once saved, click on a student's name in the list to get to the student's profile page.
- Select the **Class Info** tab to review the student's class enrollment history
- You should see enrollments for the CURRENT term, but not for the NEXT term
- You may want to set additional filters (GPA, Class Level/Classification, Credit Range).
- Once you have the target group, you can send them a message by following the same steps you would use to [send a message to students in your class](#) (start from slide 9).

SEARCH: DEPARTMENT MAJORS NOT ENROLLED FOR NEXT TERM

- Expand the **Term Data** section
 - Select the value of Term to use as the CURRENT term (this is relative to the NEXT term selected earlier)
 - Enter “1” in the Min. Credit Hours field – this will limit to students enrolled for credit-bearing courses
 - Scroll to the bottom of the search topics and click the blue Search button
 - Select Save to keep a copy of a search with these parameters
 - Even if modifications are needed, it’s best to save so you don’t have to start from scratch
 - Once saved, select a few students at random to view their course history; you should see students with enrollment in the CURRENT term but not in the NEXT term

Search

SENDING A MESSAGE TO SELECTED STUDENTS

- I. To send a message to *all* or just some of the students in your search list:
 - a) To send to all, click the check box in the gray bar. If more than 100 students are in your list, you will need to click the “Select All” link at the center.
 - b) To send to only some students, select individually by clicking the box to the left of each students’ name OR select all and then deselect those you do not want to include.

Click here to select all

HIST Majors Not Enrolled In Fall 2020 (*modified*) [Save As](#) [Delete Saved Search](#)

Saved Searches ▾

Standard User Type: Students Enrollment Terms: 2020 Spring X Majoring In: History BA, History BAMA, History Social Stud 7-12 BA, OR MHC History BA X Min. Credit Hours: 1 X

[Search](#) [Modify Search](#)

Actions ▾

100 items on this page are selected. [Select all 147 items.](#)

<input checked="" type="checkbox"/> ALL	NAME	ID	WATCH LIST	CUMULATIVE GPA	MAJOR	CLASSIFICATION	CATEGORY	ACTIONS
<input checked="" type="checkbox"/>	1	[REDACTED]		3.245	History BA	Lower Senior	Enrl in Class - Summer 2020, Entry Cohort - 2018 Spring Term, Good Academic Standing, Milestone - Math, Milestone - Reading, Milestone - Writing, Minor - Psychology, Undergrad Loans Packaging EXP, Undergraduate Student	Impersonate
<input checked="" type="checkbox"/>	2	[REDACTED]		3.560	History Social Stud 7-12 BA	Lower Junior	Entry Cohort - 2018 Fall Term, Good Academic Standing, Milestone - Math, Milestone - Reading, Milestone - Writing, Minor - Political Science, Non-CUNY Transfer Student, QC in 4, Undergrad Loans Packaging CTL, Undergraduate Student	Impersonate
							Entry Cohort - 2017 Fall Term, Good Academic Standing, Milestone - Math,	

Previous 1 2 Next

147 total results

Click here to select more than the first 100 students in the list.

Check the count here.

2. Click on the Actions button at the top of the list module.
3. Select “Send Message”

Actions → Send Message

Search [Modify Search](#)

Actions ▴

- Send Message
- Create Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Alert
- Watch
- Export Results
- Show/Hide Columns

100 items on this page are selected. [Select all 147 items.](#)

ID	WATCH LIST	CUMULATIVE GPA	MAJOR	CLASSIFICATION
[REDACTED]		3.245	History BA	Lower Senior
[REDACTED]		3.560	History Social Stud 7-12 BA	Lower Junior

SENDING AN EMAIL MESSAGE

The message box will open indicating the number of people to whom the message will be sent.

Names of students to receive the message will appear here.

Type your message to students here.

Format your message as desired.

Add a subject to your email message.

Link to web pages or documents that have a URL (including Google Docs)

Attach one or more documents, as you would in a regular email.

Click here when you're ready to send.

SEND A MESSAGE TO 21 PEOPLE

Send E-mail

Send Text

To: Charles Allegretto, Joseph Chang, Jose Cocco, Nicole Cordero, Joshua Fink, Marisa Gentile, Samuel Guen, Samiun Jisan, Adrianna Kumar, Matthew Maslin, Alison Namsaran, Brian Onaghinor, Manuela Osorio, Salvatore Pane, Yehuda Rottenberg, Santiago Sandoval, Luee Sisante, Muaaz Tahir, Francesca Tessier-Miller, Leonard Wu, Bowen Wu

Subject:

Message:

B

I

Paragraph

Add Attachment:

Select file to attach

Send Additional E-mail Notifications To:

Cancel

Send Message

TO SEE A RECORD OF MESSAGES SENT

I. Click on the Envelope Icons to open the “Conversations” module

The screenshot shows the NAVIGATE instructor home page. On the left is a vertical sidebar with various icons. The 'Conversations' icon, which is an envelope, is highlighted with a callout box. The main content area is titled 'Instructor Home' and features a 'Class Listing' table and a 'Students In My Classes' table.

Class Listing

CLASS NAME	TIME	ROOM	
(PHIL-109) Modern Logic	TR 4:45p-6:00p	QUEEN-KY-312	Progress Reports

Students In My Classes

Actions ▾				
<input type="checkbox"/>	INDEX	STUDENT NAME	CATEGORY	COURSE(S)
<input type="checkbox"/>	1	[REDACTED]	Enrl in Class - Summer 2020, Entry Cohort - 2018 Spring Term, Good Academic Standing, Milestone - Math, Milestone - Reading, Milestone - Writing, Non-CUNY Transfer Student, Undergrad Loans Packaging CTL	PHIL-109-5
<input type="checkbox"/>	2	[REDACTED]	Entry Cohort - 2019 Fall Term, Good Academic Standing, Milestone - Math, Milestone - Reading, Milestone - Writing, Non-CUNY Transfer Student, Undergrad Loans Packaging CTL	PHIL-109-5
<input type="checkbox"/>	3	[REDACTED]	CUNY SC Transfer Student, Enrl in Class - Summer 2019, Enrl in Class - Winter 2020, Entry Cohort - 2018 Fall Term, Good Academic Standing, Milestone - Math, Milestone - Reading, Milestone - Writing, Prior Degree AA	PHIL-109-5
CUNY SC Transfer Student, Enrl in Class - Summer 2019,				

TO SEE A RECORD OF MESSAGES SENT

NAVIGATE

2020 Spring

QUEENS COLLEGE

My Conversations

☒ View Personal Messages Only ☐ View Unread Only Search by Users

Actions

<input type="checkbox"/>	SENDER	COUNT	TOPIC	DATE SENT
Lizandra has not sent or received any messages with the current search query.				

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Sent messages will be listed in the **My Conversations** module. This screenshot is for an instructor who has not yet sent any messages.

These check boxes will limit what you see by applying filters. Be sure they are set the way they should be for your purposes. It may be best to start by unchecking both.

STUDENT RESPONSES TO YOUR EMAIL MESSAGES

- Your messages are sent from the email address on record in CUNYfirst (at the time of this presentation, this is your “preferred” email address, but will be updated to your official @qc.cuny.edu email address for all faculty and staff).
- When students reply to your email, their reply will be delivered to:
 - Your email application (Outlook or whatever you use to read your qc.cuny.edu email.
 - Your “My Communications” module in Navigate. You will receive a notice of unread messages in the top bar of Navigate (envelope icon).

REMEMBER: SAVED LISTS CAN BE USED AGAIN AS NEEDED