

How to Create a Student List


Student Lists are a great way to manage or message different lists, cohorts, or attributes of your assigned students. There are several ways to create student lists, here are some of the most common ways.

Uploading a student list from Excel

1. When uploading an Excel document to Bay Advisor to create a student list, the document needs to be formatted correctly. The document must contain a column of student NetID's along with the top row of NetID's being labeled AND the Excel spreadsheet must be saved as a .CSV (comma delimited) file. Lastly, be sure to save it in a place that is easily found for the upload process like your desktop.

	A	B
1	Net ID	
2	aa1234	
3	ab1234	
4	ac1234	
5	aa1235	
6	ab1235	
7	ac1235	
8	aa1236	
9		

File name: ▼
Save as type: ▼

2. To begin to upload a student list from excel into Bay Advisor, select Lists & Searches 

3. Select Actions, Upload Student List. You will be taken to the below screen. Select **New Student List** from the drop-down menu.

Select a Student List Upload Choose a Column Complete

Upload File to Student List

Choose a list to add these students to

▼

4. Name the new student list. The name is local to you and is for your records. It is suggested to include the cohort, graduation year, entry term or some specific data about the list in the name for you to remember.

Select a Student List Upload Choose a Column Complete

Upload File to Student List

Name the new list containing the students

5. Choose the .CSV file that you prepared in step 1.

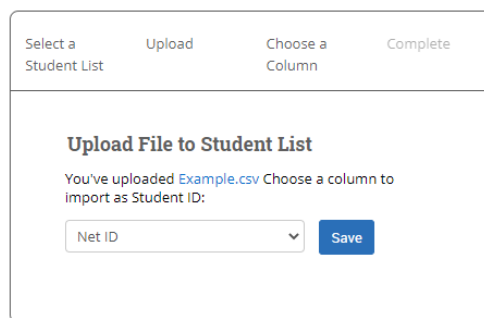
Select a Student List Upload Choose a Column Complete

Upload File to Student List

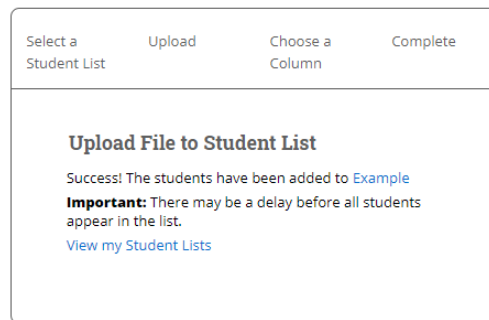
Please upload a .csv file containing a column of student IDs

Example.csv

6. Select the Net ID column title to import as Student ID and click Save.



7. Success! Your Student list is uploaded to your Bay Advisor profile. Depending on how many students are in the list, the upload could take several minutes to complete matching the student profiles with the uploaded Net ID's.

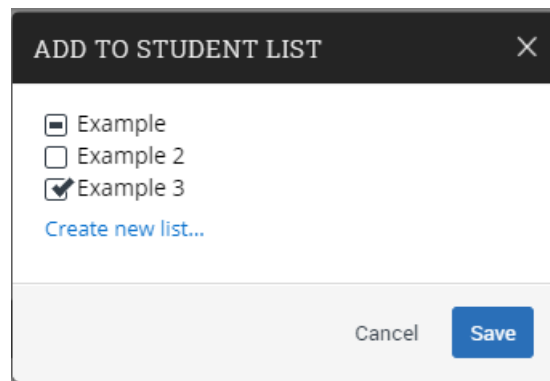


Creating a Student List from an Advanced Search

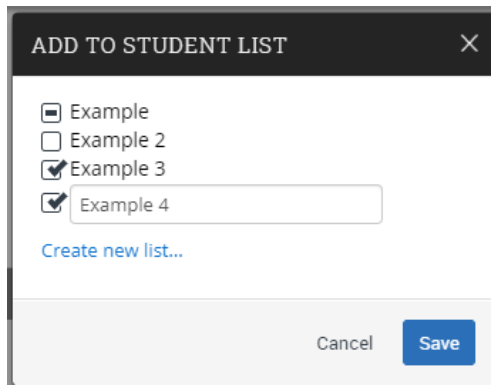
Once an Advanced Search is run, you can move all or selected students to a Student List. This is helpful in creating new Student Lists, groups of students you want to continually message, or splitting up a cohort by a specific attribute as Student Lists are also searchable and filterable within the Advanced Search feature.

1. Once your search is run, you can select specific students by the check boxes on the left, or select all, by selecting the ALL box located beneath the Actions menu. If you do select all and your search results in over 100 students, be sure to click the select all link.
2. Once the students are selected, go to Actions and select **Add to Student List**
3. The below pop-up will appear, check or uncheck the applicable boxes.

- a. If any of the students are part of an existing Student List, the Student List will have a in the check box next to it. If the is unselected, those students will be removed from the existing Student List.
- b. If the box is open, no students from the search are part of the Student List. If you then check this box, the students from the search will be added to the existing Student List.
- c. If the box is checked, ALL the students from the search are part of the Student List, but the students within the Student List are NOT necessarily within the search. If this box is unchecked, the students from the search will be removed from the existing Student List, just like in point a.

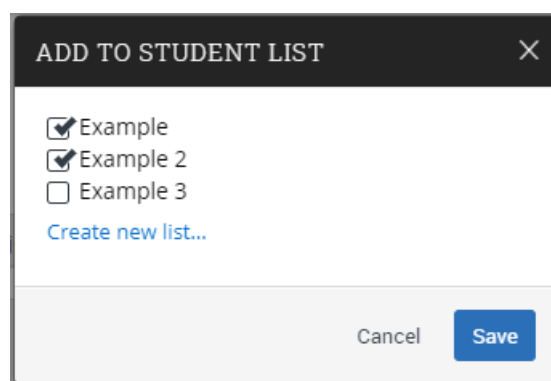
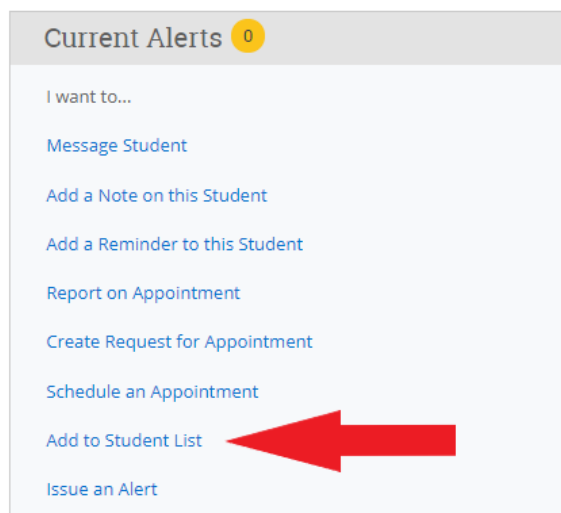


4. Select **Create New List...**, name the list (Example 4), be sure the box is checked, and click Save.



Adding (or deleting) a single student to a Student List(s) from their student profile page

1. Click on **Add to Student List** from the links on the right side of the student profile page.
2. A pop up will appear with all your previously saved Student Lists. If any of the lists are checked, that means the student is already a part of that Student List (Example). To ADD the student to the desired student list, click the check box so a check mark appears (Example 2). To REMOVE a student from a Student List, click the check box so the check mark disappears (Example 3).
3. Click Save and the student will be added or removed from the selected Student List(s).
 - a. You can also create a new Student List from the link, by selecting **Create new list...** then name it and add the individual student to the list.



If you have any questions or issues with this process, please contact Bill Irwin at bill.irwin@csueastbay.edu.