Advisor Guide

GradesFirst

www.gradesfirst.com
Welcome advisors and congratulations on implementing GradesFirst at your institution. We truly believe that you’ll enjoy using GradesFirst as much as we did creating it. Within the application you will find a powerful combination of programming functionality that focuses on helping advisors more effectively succeed on student retention and eligibility. In other words, GradesFirst will put the power of information at your fingertips as you use our diverse set of tools to help maximize your advising efficiency. This 100% web-based system includes features such as: enhanced early alerts, progress reporting, advising center management, tutor management, appointment scheduling, a communication center for e-mail and text messaging, assignment tracking, attendance monitoring, study hall monitoring and robust reporting among other great features. 

The scope of this document is to provide you, the advisor, with a source of information that will help you understand and implement GradesFirst. Since GradesFirst is a very flexible application, this document will instruct you on the basics of implementing and using the system. However, keep in mind, these instructions will be general in nature as universities will have a varying degree of needs.

Support

**How do I contact technical support?** There are three ways to do this:

1. **Log a support ticket**: Perhaps the best way to receive technical support is email us at support@gradesfirst.com. This will automatically create a ticket, viewable by our entire support staff, to ensure a speedy reply and resolution.

2. **Pick up the phone**: In the unlikely event you are not able to log in a support ticket, please feel free to call us for technical support. Our phone number is (800) 745-5180, press 9 for support.

3. **Send in a Chat**: If you are in the app and have a simple question that you believe can be answered without an email or call, feel free to use our live chat feature. Simply click the link at the bottom of the page labeled, “Need Some Help?” This will open up a chat box in which you can type your question(s). Our support team is available via chat from 8:00 am – 5:00 pm CST.
**Mass Edit of Students**

The amount of time advisors will need to spend on administration tab (Admin) will be limited. For the most part, this setup will already be done for you by the GradesFirst Administrator. However, we will cover a commonly used option found on the Admin tab called ‘Mass Edit of Students’ as you will inevitably come across the need to use this option at some point in time. From an advisor’s perspective, the main use of Mass Edit of Students will be to mass assign the following information:

- Student Advisors
- Coaches
- Weekly Study Hall Requirement and more...

Users will find the ‘Mass Edit of Students’ option on the Admin tab and then under the ‘User’ section (see highlighted option in screenshot below).

![Mass Edit of Students Screenshot](image)

When you open the ‘Mass Edit of Students’ option, GradesFirst will default to the ‘Simple Search’ mode. Most users find it much more efficient and flexible to change the view to the Advanced Search (see screenshot below). The Advanced Search will enable you to search for specific groups of students such as “Show me all my sophomores who are on the Football team.”
When your students are displayed in the Search Results, you will need to “select” each of them by placing a checkmark beside each of their names OR if you want to select ALL displayed students, simply click checkbox to the left of the column header ‘Name’.
Once your students are selected, you can perform the options listed below.

1. **Status.** Need to allow all of your students access to GradesFirst? That’s easy, simply select the appropriate students and click the ‘Save this Setting’ button under the Enabled/Disabled section. This process will email all selected students an activation email allowing them to now log into GradesFirst.

2. **Password.** This option allows the user to individually or en mass change a users password. Need to reset passwords? This option is for you.

3. **Classification.** This option will let you mass assign the Classification (e.g. student grade level) to all selected students.

4. **At-Risk.** This will give you the ability to mass assign (or un-assign) the At-Risk status to those selected students.

5. **Assign to Someone.** Using this option gives the user the ability to assign selected students to an Advisor, Coach, Tutor or Professor. You may also use this option to un-assign selected students from a specific user as well. One of the first tasks, after importing your students, should be to mass assign students to their Advisors and/or Coach. This is the tool that you will use.

6. **Category.** A Category essentially represents what sport or activity a student is participating in while at the institution. This option will enable you to quickly add or remove selected students from a particular Category or sport activity. For instance, if Brian Johnson just joined the basketball team, this is the option you would use to assign him that category.

7. **Study Hall.** With this option you may mass assign the weekly study hall requirement to your selected students. By using the Advanced Search option, you can easily mass assign a 5 hour study hall requirement to your baseball players while only assigning a 4 hour study hall requirement to your Volleyball team.

You may also choose to assign, or take away, Charity time with this option. By definition, Charity Time is time added or subtracted from accrued Study Hall hours. To give student bonus charity time, simply enter the positive number of hours or minutes to assign (e.g. 1 hour and 30 minutes).

**Example 1:** A student is required to complete 5 hours of study hall time each week. Assigning them 1 hour and 30 minutes of Charity Time, would then mean they would only need to accrue 3 hours and 30 more minutes to complete their weekly study hall requirement.

**Example 2:** A student has logged/accrued 2 hours of study hall this week, however due to skipping study hall, a penalty of 30 minutes needs to be applied to their accrued account. This can be done by entering a negative value (e.g. -45 minutes) in the charity time fields. In this scenario then, a student who has accrued 2 hours of study hall time, would be left with only 1 hour and 30 minutes of accrued time for the week.

8. **Tags.** This tab will enable the user to either mass assign or un-assign tags at will. Need to delete an old tag, well, now you can. Switch to the Advanced Search > select the Tag you would like to remove from the drop down list > click Search > select all students > click the Tag tab > select Remove tag > single-click the tag you would like to delete so that is appears in the ‘Tags’ section and then click on ‘Save this Setting’. Doing this will remove the selected tag from all users and then also remove it from GradesFirst.
Home

This is where you, the advisors, will be spending the majority of your time. From the Home page advisors can do a wide variety of tasks. This is the default page that appears each time the advisor logs into GradesFirst.

Note: If your home page looks somewhat empty, meaning not showing any students, more than likely your students have not been mass-assigned their advisor (you). Ask your GradesFirst Administrator for help on this.
1. **My Assigned Students.** By default this view shows all students who have been assigned to you as the Advisor whenever you log into the GradesFirst Home tab. From this view you may click on the student name (which is actually a link) to access the student’s profile page. You can also view the student’s Category, Number of Absences and whether or not they are considered to be “At-Risk”.

2. **Upcoming Appointments.** Need to see a list of all of your upcoming appointments, this tab is for you. From here you may also contact (via the Send Message button) a student if correspondence is needed. We will show you the next 15 upcoming appointments before screen pagination.

3. **My Availability.** The ‘My Availability’ tab enables the advisor to setup “office hours” in which appointments may be made for them by students or even other advisors. If your institution doesn’t allow their students to automatically schedule office hours with their advisors, don’t worry, this option may be turned off from the Admin tab > User Roles > and edit the Student Role to not allow for Create Basic Advising or Tutoring Appointments for Students.

Defining your ‘Times Available for Advising’, we hope, is very straight forward and intuitive. Simply click the ‘Add Time’ button and choose the times and days you can meet each week. See the below screenshot for details.
In the example above, I have indicated this advisor can meet with students on Tuesday and Thursday between 8:00AM – 5:00PM at the Student Center. If I meet at different times on Monday and Wednesday, I would simply click the ‘Add Time’ button and define meeting times for Monday and Wednesday.

4. **Advising Center.** This Advising Center tab was created to work with our Advisor Center Kiosk functionality. Advisors will use this tab to monitor incoming students to your center. GradesFirst will track the following students:
   a) Student who have arrived for their scheduled appointment.
   b) Students who are waiting to meet with them.
   c) Students who are waiting to meet with the first available advisor.
   d) Students who are waiting to meet with another advisor.

5. **Advisor Options.** This command bar contains key functionality that advisors will used on a daily basis.
   a) **Send a message:** Gives advisors the ability to send an e-mail, text or Facebook message to selected student(s).
   b) **New Appointment:** Allows users to create General, Advising or Tutor appointments for selected student(s).
   c) **Advising Report:** Allows for the creation of an advising report for student. Use this option to file an advising report summarizing what was covered during a student walk-in visit.
   d) **Charity Time:** Applies only to those schools that use Study Hall. This option enables advisors to either increase or decrease student’s study hall time. Select the student for whom you wish to adjust their study hall time and click the Charity button.
e) **Tag**: Consider a ‘Tag’ as a unique way of grouping students. You may then search, and print reports, for all students associated with a particular Tag. For instance, every Monday you may need to print a study hall report for all “Chess Club” members. This is possible by applying the “Chess Club” Tag to those specific students. To add a Tag, simply select those students > click the Tag button > enter the name of the Tag and click Save.

You may also view students assigned to a particular Tag by clicking the ‘Filter By Tags’ option (above the ‘Send Message’ button) and then choosing which Tag’s students you wish to view.

f) **Notes**: Allow the user to create an entry that is attached to the student’s profile. Notes different from advisor reports in that notes are not linked to an advisor visit. Rather notes are special commentary that may be added at any time and for any purpose. See screenshot below for more details on notes.
6. **Options.** Features that are considered non-daily activities would appear in this area. From here advisors can do the following:

a) **Appointment Campaigns:** The feature enables the advisor to request that specific students select a specific date and time in which to schedule an appointment instead of the advisor creating appointments for each and every student (which can be a time consuming task). This feature is commonly used when an advisor must meet with all of their students at least once per term. To begin, click on Appointment Campaigns > under Options > Create a New Campaign and follow the screens illustrated below. See below.
Creating your Campaign

1) **Enter the Name of Campaign**: the name of the campaign only appears to the advisor. This needs to be a name that makes sense to you.

2) **Topic of Appointment**: the topic will be the subject of the email going to the student. Something descriptive is most helpful here.

3) **Special Instructions to Student**: this contains the message to the student

4) **Choose the advisors for the Appointment Campaign**: add/remove advisors from the campaign

5) **Choose the Start and End Date**: start and end date of your campaign

6) **Length of the Appointment**: length of the appointments. User can pick from several appointment durations that include 10, 15, 30, 45 and 60 minute intervals.

7) **Appointments to be scheduled per student**: how many times the student can schedule an appointment. Per student, you can choose to allow the student to click the link in their email and schedule more than one appointment if necessary. Once their allowed appointments are scheduled the link can no longer be used.

8) **Location**: the location of where the appointment(s) will be held

Once the Campaign Details are created and the selections are defined, the next step is adding recipients. Let’s click **Select Students to Invite** here you can use the tabs to search for recipients in several ways.

1) **Search for Recipients**: provides users with advanced search filters to find, and select, students

2) **Search by My Students**: search for students that are assigned to me

3) **Search for Students for other Advisors**: search for students that are assigned to other advisors
After locating the students for my campaign, I select the check boxes next to their name and click Add Students. The Students are then added to my Selected Recipients tab.

Click Review Campaign Options > Now we can review our campaign.
The final step: click - **Start the Campaign**.

The students will receive emails that include the campaign information that you have defined and the link to schedule their appointment(s). See example below.

When the student clicks the link to schedule their appointment they will first need to review the basics of the campaign and then choose a date and time to meet and then click **Create This Appointment**.
An Appointment Confirmation will be shown along with an additional link to schedule an additional appointment if the Advisor set the “Appointments To Be Scheduled per Student” for more than one appointment. Email notifications will go out to the attendees as well.
To maintain my campaign, I can go back to my home page > Options > Appointment Campaigns. There are two tabs: All Campaigns will show me every campaign created or I can click on the My Campaigns tab to view only my own.

Prior to clicking on the link for the campaign let’s look at several helpful tools. Each campaign will include Pie Charts that dynamically update to represent the current status of each campaign.

1) **Appts Made chart**: the percentage of the appointments that have been scheduled (in this example it’s 17%)
2) **Reports Created chart**: the percentage of reports that have been filed for the scheduled appointments (for this campaign is 0%)

In addition, when a campaign expires a notation in red will appear next to the begin and end dates of the campaign. As shown above.

Now, let’s click the link of the campaign and look at how we can monitor the Appointments Made, Appointments Not Yet Made, Reports Created and Editing options in the Options box.

1) **Appointments Made**: view details of the appointments that have been made, send a message, add a note or tag a student if necessary.
2) **Appointments Not Yet Made**: view students that have yet to make their appointments, resend appointment requests, send a message, add a note or tag a student.
3) **Reports Created**: review the details of reports that have been created for those appointments scheduled, send a message, add a note or tag a student.
Options Box:

1) **Edit Campaign Details**: to edit any campaign details for example (advisors, message to students etc)
2) **Add/Remove recipients**: add or remove recipients from the campaign
3) **Delete the Campaign**: to completely remove a campaign from the application

Note: Removing a student from a created campaign by selecting the Add/Remove Recipients link, will disable the link that was previously sent to the student via email. However, if the student clicks on that link they will see a Removal Message that you are asked to enter at the time remove them. See screenshot.

Advisor entering message:

Student message after removal (when the student clicks the link):
What happens if a student loses/deletes the original appointment campaign email? Well, resending an Appointment Request email is easy. Simply go to the Appointments Not Yet Made tab and select the students you would like to notify. Then click Resend Appointment Request. An email will go out to the students just as it originally did when the campaign was created.

This concludes the section on Appointment Campaigns.

Options Box (additional to Appointment Campaigns):

A. **Start Kiosk Mode**: This option will let advisors put a computer into kiosk mode (or study hall mode). You will also use this option to initiate advisor kiosk. See the Advisors Kiosk guide for more information.

B. **My Messages**: This option lists all emails sent ‘from’ you and ‘to’ you via GradesFirst. Can’t remember if you sent the entire football team an email, this option will show you.

C. **Travel Letters**: You may or may not have access to travel letters as they are an extra add-on module that must be purchased separately. For more information on Travel Guides, see our Travel Letter guide.
7. **Advisor Reporting.** This section contains your most recent advising appointments and also advising reports that you have created.

   A. **Recent Advisor Appointments.** This tab will display your recent, or past, advising appointments that you have conducted. We have now added a pagination system that will let you see your entire advisor appointments ever created in GradesFirst.

   B. **Recent Reports You Created.** When you create an advising reporting, one place it will be visible is on this tab. Similar to the Recent Advisor Appointments tab, this will display all advisor reports you have ever created via our new pagination system.

8. **Calendar tab.** This is where the Advisor can view all “events” they have been assigned to. Items or events that may appear on the calendar include Tutoring, Advising, General, “Busy” and optionally Course events. If you are viewing a student’s calendar, you will also be able to see their assignments.

   ![Calendar Tab](image)

   What an advisor is allow to do on this calendar page varies greatly based on permissions assigned to them. For instance, in order to use our drag and drop calendar functionality (as described in the above screenshot), the advisor will need permissions called Appointment Update (as defined on the User Role they have been assigned to). Appointment Update permissions also grants the advisor the ability to edit any appointments as well.

   If you are not able to edit/move/delete appointments, please contact your GradesFirst Administrator to see about adjusting the Advisor User Role to allow for these options.
**Search**

The Search tab offers users a great way to search for a specific group of users (e.g. students, professors, advisors) and then optionally perform some action for them. For instance, it is possible to get a list of all Men’s Baseball players with less than a 2.0 cumulative GPA and send them an email. You may also use this functionality to locate and edit a user’s account.

1. **Search GradesFirst.** This option enables the advisor search for a specific type of users. For instance, you may search to get a list of Tutors, Advisors, Students or simply All Users.

2. **Advanced Search.** You can toggle between the Advanced and Simple search by clicking the either link under the Search for Students heading. When you first click on the Search tab, GradesFirst defaults to the Simple Search. With the simple search, you only have the option to search by Keyword. This search will enable the search to search a specific character (or group of characters in the users name), classification and/or category. The Advanced Search, as shown above, gives users a chance to search for a wide variety of other options such as First Name, Last Name, Cum. GPA less than, and many more. Once you have entered your search criteria, click the Search button.

3. **Multi – Select.** This functionality allows you to choose more than one criteria within a given search filter. In the example above, I wish to see all of the students in the Category of Women’s Basketball or Men’s Basketball. You can either type in the criteria you would like to use or click into the field for a list of possible choices to be populated for you.

4. **Additional Filter.** When you search for students, you will have an additional option in which to further narrow your search results. This option(s) will enable you to search only for ‘My Students Only’, ‘At-Risk Students Only’ and to ‘Include Inactive’ users as well.
5. **Additional Options.** Viewing the search results you can then optionally select to **Send a Message**, **add an Advising Report**, **start an Appointment Campaign**, **Schedule Appointment**, **Tag**, or **Mass Print** for those users you have both searched for AND selected.

**Facebook Integration**

In an effort to help our users stay in constant communication with their students, GradesFirst is utilizing the popular social networking site Facebook. With our new Facebook interface, staying in touch with your students couldn’t be easier. Before students can use the GradesFirst interface with Facebook, an invitation must be sent out of GradesFirst and accepted by the student. The invitation may be sent out in two different ways. The first way to send a Facebook invite is directly from a specific student’s Home page (see circled portion of screenshot below).

![Facebook Interface Screenshot]

Clicking the “Send Eric a Facebook Invite” will send an email to Eric Angell with directions on how to install the GradesFirst Facebook application.

The second way to send out Facebook invitations is via the Students Without GradesFirst Facebook report. Yes, you read that right, to send out invitations en mass, you need to run this report. To run this report, click on the Report Tabs, navigate down
to the Student Information Reports section and choose the report named ‘Students Without GradesFirst Facebook.’

This next screen will look very familiar to you as it is the standard report filter page where you can select specific student(s) in which to send the Facebook requests. In the screenshot shown below, I have chosen to send out the request to all Freshmen.

1. **Classification.** This is just one of the filtering options one may use to target a specific group(s) of students in which to send a Facebook request.
2. **Invite to Facebook.** Once you have identified AND selected the student(s) (by placing a checkmark by each student’s name) for whom you wish to send the Facebook request, simply click the ‘Send Facebook Install Request’ button and an email will be sent to each selected student.

GradesFirst will then email each student individually asking them to click a link (embedded within the email) to ‘sync’ their GradesFirst account with Facebook. See screenshot below to see a sample of the email.

While this screenshot looks fairly busy, it is easier to understand when you “break it down.”

A. **To and From.** This will show who requested GradesFirst to send the Facebook request (“the From”) and then who the email was intended for (“the To”).

B. **Subject.** Every email should contain a subject that is easily recognizable to the recipient, this email is no different. We understand students receive many emails per day, so our intent was to make this email stand out with a subject line that clearly identifies the purpose of this email.

C. **Your Institution’s Name and Logo.** To make this email official, we have included both your institution’s name and logo within the email so students will realize this is an official email from your institution.

D. **Salutation.** The salutation will be the name of the student who will be receiving the email.

E. **‘The Link’.** This is the link each student will click to initiate the linking process between GradesFirst and Facebook. When the student clicks the link, they will be taken to the screen entitled “Allow Access”? This screen is shown at the top of the next page.

F. **User Code.** This is the code the student will want to “Copy & Paste” into GradesFirst/Facebook Log In screen on the next page. They will arrive at this Log In page when they click ‘Allow’ on the “Allow Access?” page.
G. **GradesFirst Logo.** This is our official logo and support email address should the students have any questions.

When the link is clicked (refer above to outline ‘E’) in the invitation email, the student will be prompted to either ‘Allow’ or Leave Application. The student should click ‘Allow’.

After clicking ‘Allow’, the student will be brought to the authentication (or Log In) screen shown below.

From the above Log In screen, the student/user can choose to login with either their User Code (refer above to outline ‘F’) or their email address that is currently defined in GradesFirst. It is strongly recommended the student copy and paste the user code that is shown in their invitation email.

A. **Activation Code.** The user should enter the User Code that was displayed in their Facebook request email.

B. **GradesFirst Email.** The user may alternatively enter their email address that is defined in GradesFirst to receive an email, with a link, that they will use to ‘sync’ up their GradesFirst and Facebook accounts.

Once the user’s GradesFirst and Facebook account have been ‘synced’ up, their new GradesFirst/Facebook page will look similar to the screenshot shown below.
A. **Messages.** The messages area of the Facebook home page will display all Facebook specific messages sent from GradesFirst. In GradesFirst, when a user chooses to send a message to a student(s) they have the option to either send an Email, Text message or Facebook message. When the Facebook message is selected, the message is sent directly to the student’s Facebook page. The number in parenthesis (shown above) is how many ‘new’ messages the student has waiting for them. In the example shown above, Alan Golden as one new message.

B. **Class Schedule.** This is where the student can view their class schedule for the current term.

C. **Email your Professor.** A really nice option on this page is the ability to send an email directly to your professor. For instance, if you need help on an assignment, you can use this option to contact your professor.

D. **Request a Tutor.** Need some help on a specific subject, request a tutor. When a student clicks this link, a form will appear asking the student ‘Preferred Meeting Time’ of the tutoring session (see screenshot on next page). Then, depending on how GradesFirst is setup, an email will be sent to both the Tutor Coordinator and/or the student’s Advisor for review.
E. **Email All Professors.** Not able to attend class today? Use the GradesFirst/Facebook interface to send an email to ALL your professors! This option gives the student a convenient way to contact all his/her professors with a single email.

F. **Add a New Calendar Item.** Need to block off a specific block of time so that others will know not to schedule a conflicting activity for you? This option is for you. By creating an event via the GradesFirst/Facebook interface, other users who can view your calendar will be able to see the same event. This helps to prevent scheduling conflicts. A good example would be if a student is participating in a study group session and wants to ensure no other event is scheduled for him/her for the same time.

So students can use their Facebook page for a wide variety of GradesFirst functionality. Also, keep in mind this all this GradesFirst functionality is safe and secure behind each person’s Facebook login. So in other words, none of the GradesFirst information, messages or appointments are visible on the student’s Facebook Wall or Messages.

*If you have any questions, please contact either your GradesFirst Administrator or GradesFirst Support at support@gradesfirst.com.*