

2011

UofL Advisor Guide

Grades **First**



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Introduction

Advisors: Welcome to GradesFirst, your home for staying connected with other advisors and students! We truly hope you enjoy using GradesFirst and find it essential to helping you manage your daily activities. Within the application you will find a powerful combination of programming functionality that focuses on helping advisors more effectively succeed on student retention and communication. In other words, GradesFirst will put the power of information at your fingertips as you use our diverse set of tools to help maximize the effectiveness of your daily student activities.

The scope of this document is to provide you with a source of information that will help you understand and use GradesFirst. Since GradesFirst is a very flexible application, this document will instruct you on the basics of 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? You can log a support ticket by emailing Neil Gibbs, GradesFirst Administrator, at neil.gibbs@louisville.edu. We will also log a support ticket to track the progress of your support request. We will then work with GradesFirst, if needed, to troubleshoot and fix any technical problems.

Advisor Home Page

This is where you, the advisor, 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.

The screenshot shows the GradesFirst Advisor Home page. At the top, there is a red header with the GradesFirst logo and the University of Louisville logo. Below the header, there are navigation tabs for Home, My Calendar, Reports, Search, and Admin. The main content area is divided into several sections:

- Advising Home:** This section includes a "My Assigned Students" tab, a "Filter By Tags" dropdown, and a table of students. A callout box points to the "Filter By Tags" dropdown, stating "Displays the students who are assigned to you." Below the table are buttons for "Send Message", "Schedule Appointment", "Advising Report", and "Note".
- Options:** A sidebar menu with links for "Appointment Campaigns", "My Messages", and "School Information".
- Upcoming Appointments:** A list of upcoming appointments with details like "Academic Planning" by Shannon Bigs, "External Transfer" by Brian Celex, "General Advising" by Ivan Ban, and "Academic Planning" by Shannon Bigs. A callout box points to this section, stating "Displays your Upcoming Advising appointments."
- Advisor Reporting:** This section includes a "Recent Advisor Appointments" tab and a "Recent Advising Appointments" table. A callout box points to the table, stating "Displays your Recent Advising Appointments and Advising Reports".

At the bottom of the page, there is a footer with contact information and user settings.

Areas of Interest:

My Assigned Students: Displays the students that have been assigned to you.

Advisor Reporting: Displays your most recent past appointments and advisor reports.

Upcoming Appointments: Displays, in order, your upcoming appointments.

Creating a User in GradesFirst

Once you have completed the Quick Search and have determined that the student is not in the system, your first step will be to start Front Desk Mode. The Front Desk Mode is located in the bottom right corner of your Home page.

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL [Quick Search](#) Term: Fall 2011 [Online Support](#) [Log Out](#)

Advising Home

My Assigned Students Upcoming Appointments My Availability Advising Center

Filter By Tags

Send Message Schedule Appointment Advising Report Tag Note

<input type="checkbox"/>	Student Name	Category	At Risk?
<input type="checkbox"/>	1 Abner, Christopher		No
<input type="checkbox"/>	2 Ahmed, Marian		No
<input type="checkbox"/>	3 Alarif, Ibrahim		No
<input type="checkbox"/>	4 Allen, Autumn		No
<input type="checkbox"/>	5 Allgeier, Travis		No
<input type="checkbox"/>	6 Alstott, Hayden		No
<input type="checkbox"/>	7 Amponsah, Elizabeth		No
<input type="checkbox"/>	8 An, Yu		No
<input type="checkbox"/>	9 Anderson, Kendrick		No
<input type="checkbox"/>	10 Angel, Roger		No
<input type="checkbox"/>	11 Asif, Syed		No
<input type="checkbox"/>	12 Atkinson, Michael		No
<input type="checkbox"/>	13 August, Tess		No
<input type="checkbox"/>	14 Austin, Griffin		No
<input type="checkbox"/>	15 Banister, Lisa		No

< previous 1 2 next >

Advisor Reporting

Recent Advisor Appointments Recent Reports You Created

Recent Advising Appointments

Add Report Mark No-Show

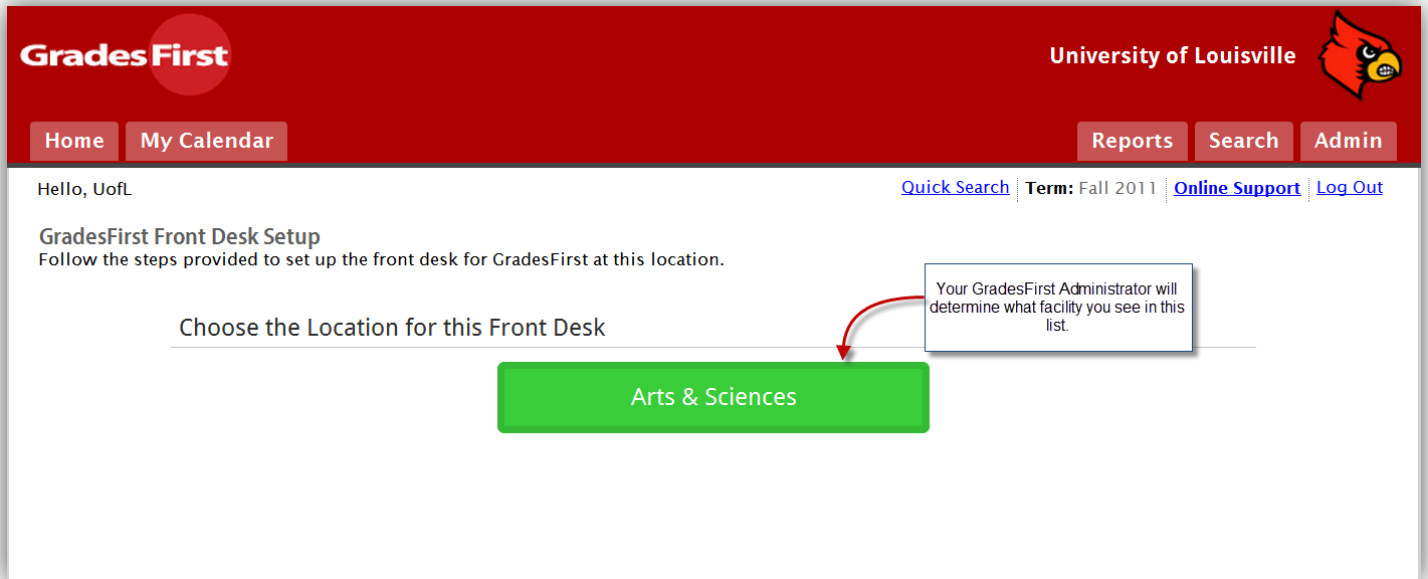
<input type="radio"/>	Date	Topic	Attendee	Duration	Report Filed?
<input type="radio"/>	08/03/2011	Academic Planning	Test 20, Student	30 min	Not Yet.
<input type="radio"/>	08/02/2011	Academic Planning	Test, Ashley	30 min	Not Yet.
<input type="radio"/>	08/02/2011	Academic Planning	Test, Ashley	30 min	Not Yet.
<input type="radio"/>	08/02/2011		Test 20, Student	30 min	Not Yet.
<input type="radio"/>	08/01/2011	General Advising	Abner, Christopher	30 min	Not Yet.
<input type="radio"/>	07/29/2011	Academic Planning	Ebertson, Nick	30 min	Not Yet.
<input type="radio"/>	07/28/2011	Academic Planning	Presley, Elvis	30 min	Not Yet.
<input type="radio"/>	07/27/2011	Academic Planning	Student, Test 11	30 min	Not Yet.
<input type="radio"/>	07/27/2011	Academic Planning	Student, Test 9	30 min	Not Yet.
<input type="radio"/>	07/27/2011	Academic Planning	Student, Test 11	30 min	Not Yet.

< previous 1 2 3 4 next >

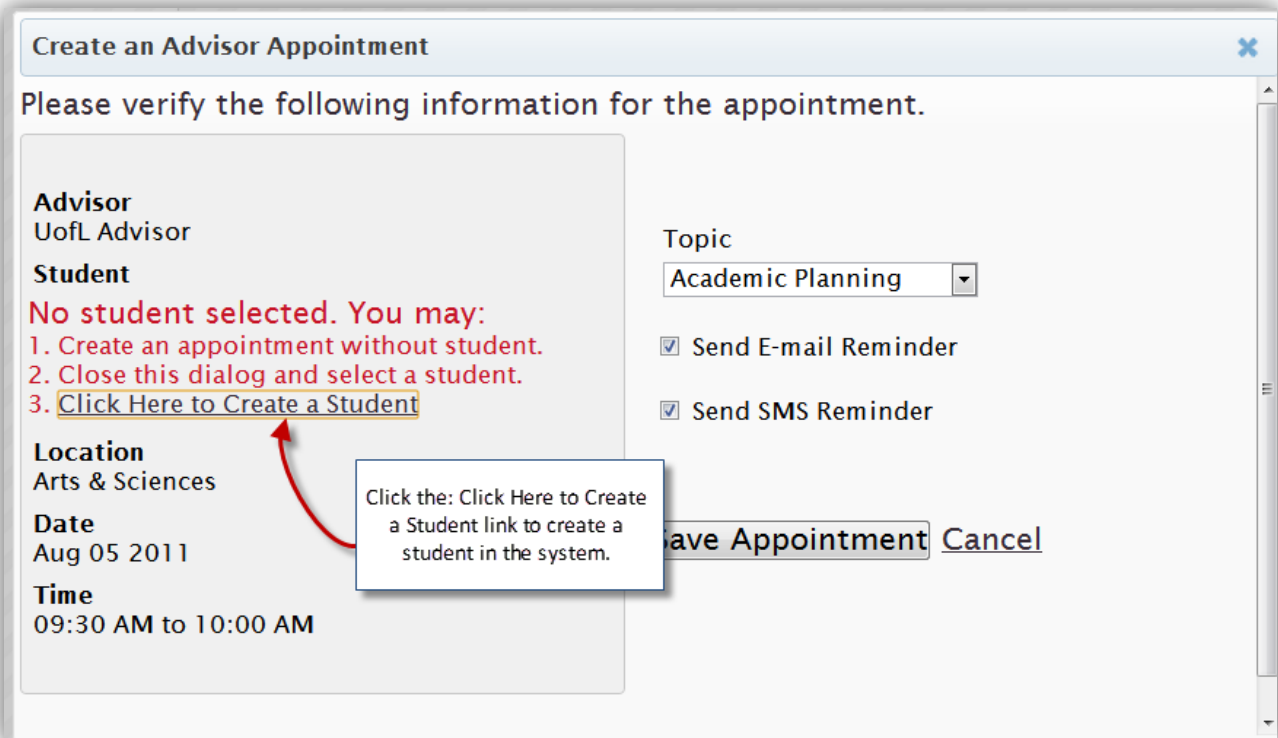
To start Front Desk Mode, scroll to the bottom of your page, and click the Front Desk Mode Link

GradesFirst.com support@gradesfirst.com [Online Support](#) User Settings: [Update my Password](#) [Front Desk Mode](#)

Your GradesFirst Administrator will determine what Facilities or Centers you see in this list. Typically you will only see one facility. This will be the facility you work with on a daily basis.



Pick the **Advisor, Date and Time**. When you attempt to save the appointment, you will see an option that allows you to create a student.



Upon clicking the Click Here to Create a Student Link, a small form will appear. The student's First and Last name can be the same as another student. However, the **Student ID and E-mail address** must be unique. GradesFirst will not allow you to create a student with the same Student ID as another student in the system.

If the student knows his/her UofL Student ID, you may enter it. If the student does not have or does not know their student ID, use this naming convention: **999 + the last 4 digits** of the student's social security number.

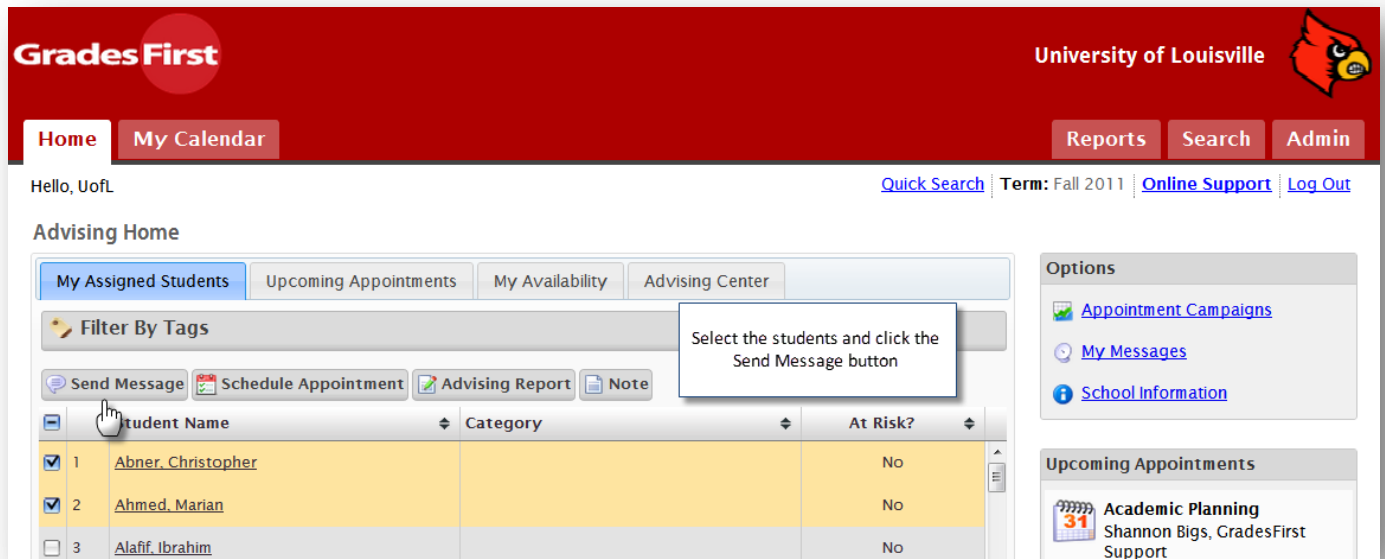
If the 999 + the last 4 digits of the student's social security match another user in the system, simply add a digit to make the number unique.

The screenshot shows a web form titled "Create an Advisor Appointment". The form is divided into several sections. On the left, under "Advisor", it says "UofL Advisor". Under "Student", there is a note: "Enter student information below, and the student will be created when the appointment is saved." Below this are input fields for "First name", "Last name", "Student ID", and "Email", each with a "Cancel" link below it. On the right, there is a "Topic" dropdown menu set to "Academic Planning", and two checked checkboxes: "Send E-mail Reminder" and "Send SMS Reminder". At the bottom right of the form are "Save Appointment" and "Cancel" buttons. A red arrow points from a warning message box to the "First name" and "Last name" input fields. The warning message box contains the text: "Enter the Student's First and Last name. Be sure you enter a UNIQUE Student ID and Email address."

Once you have completed the Student Information form, verify the details of the appointment. Finally, save the appointment. Once you save the appointment, the student will be created in the system.

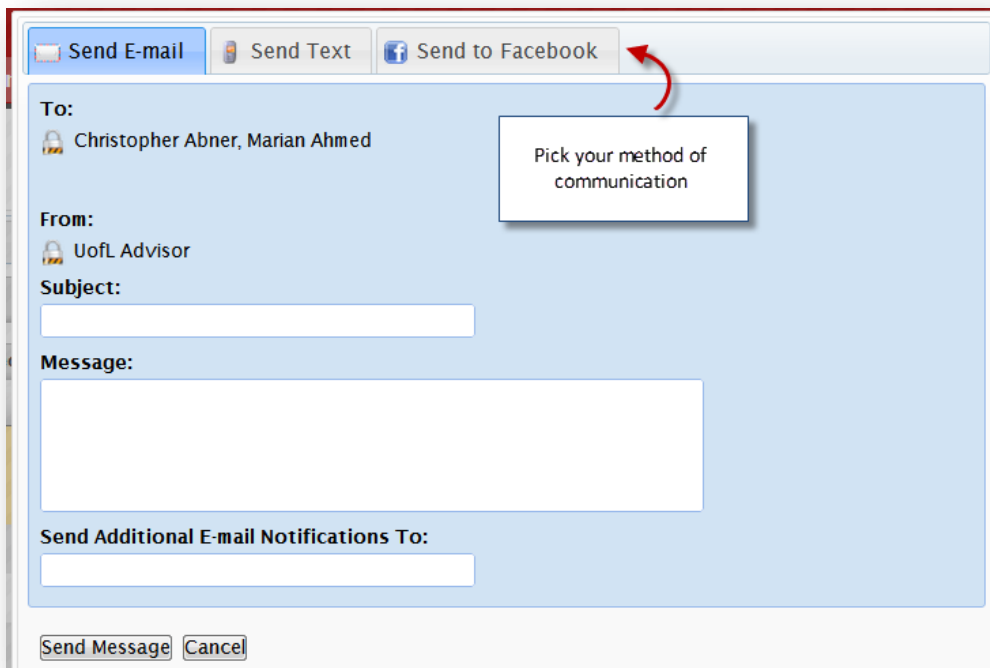
Communication

Sending messages with GradesFirst is simple. First select one, some or all of your students. Then click the Send Message button. Pick your form of communication: Email, Text or Facebook, and click the Send button.



The screenshot shows the GradesFirst interface for a University of Louisville user. The top navigation bar includes 'Home', 'My Calendar', 'Reports', 'Search', and 'Admin'. The main content area is titled 'Advising Home' and features a 'My Assigned Students' tab. Below this tab, there are buttons for 'Filter By Tags', 'Send Message', 'Schedule Appointment', 'Advising Report', and 'Note'. A table lists three students: Christopher Abner, Marian Ahmed, and Ibrahim Alaff. A callout box points to the 'Send Message' button with the text 'Select the students and click the Send Message button'.

	Student Name	Category	At Risk?
<input checked="" type="checkbox"/>	1 Abner, Christopher		No
<input checked="" type="checkbox"/>	2 Ahmed, Marian		No
<input type="checkbox"/>	3 Alaff, Ibrahim		No

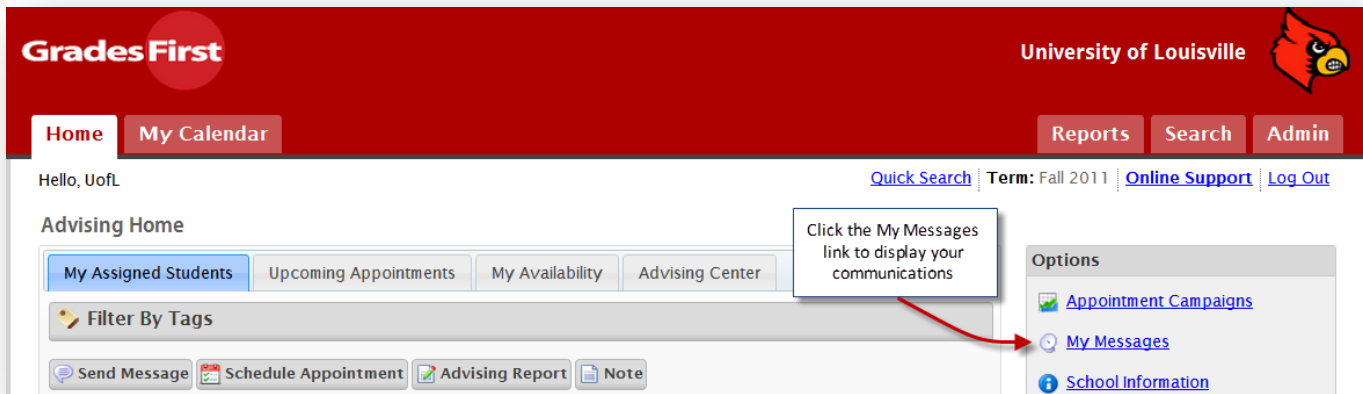


The screenshot shows the 'Send Message' dialog box. At the top, there are three buttons: 'Send E-mail', 'Send Text', and 'Send to Facebook'. A callout box points to the 'Send to Facebook' button with the text 'Pick your method of communication'. Below the buttons, the dialog box contains fields for 'To:', 'From:', 'Subject:', and 'Message:'. The 'To:' field is populated with 'Christopher Abner, Marian Ahmed'. The 'From:' field is populated with 'UofL Advisor'. The 'Subject:' field is empty. The 'Message:' field is a large text area. At the bottom, there is a 'Send Additional E-mail Notifications To:' field and two buttons: 'Send Message' and 'Cancel'.

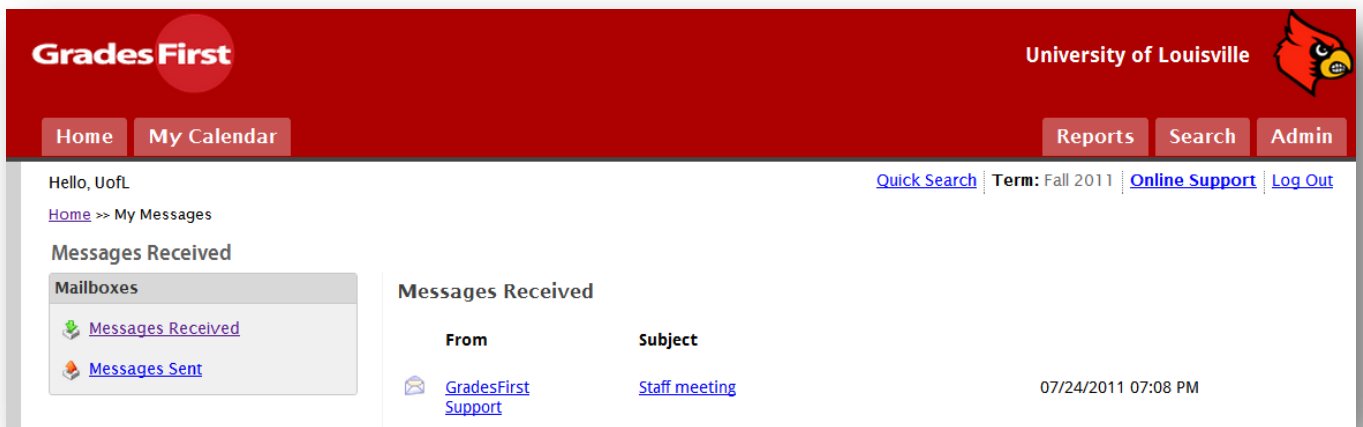
If you select multiple recipients for your message, the message will send individually. You must pick one form of communication. You can't send multiple forms of communication at once.

My Messages

Track the messages you send through GradesFirst by clicking on the My Messages link. From here you can see who you have sent messages to and whom you have received messages from.



The screenshot shows the GradesFirst dashboard for the University of Louisville. The top navigation bar includes "Home" and "My Calendar" buttons. The main content area has a "Hello, UofL" greeting and a "Quick Search" field. A callout box points to the "My Messages" link in the "Options" sidebar, with the text "Click the My Messages link to display your communications".



The screenshot shows the "My Messages" page. It features a "Messages Received" section with a table of messages. The table has columns for "From" and "Subject". A message is listed from "GradesFirst Support" with the subject "Staff meeting", dated "07/24/2011 07:08 PM".

From	Subject	Date/Time
GradesFirst Support	Staff meeting	07/24/2011 07:08 PM

Click on the Messages Received or Messages Sent link to display your messages within GradesFirst. GradesFirst will display the type of message and the date and time the message was sent or received.

Appointment Scheduling

From your Home page, it is simple to schedule an Advising appointment. Simply select the student(s), then click the Schedule Appointment button.

	Student Name	Category	At Risk?
<input checked="" type="checkbox"/>	1 Abner, Christopher		No
<input type="checkbox"/>	2 Ahmed, Marian		No
<input type="checkbox"/>	3 Alafif, Ibrahim		No
<input type="checkbox"/>	4 Allen, Autumn		No
<input type="checkbox"/>	5 Allgeier, Travis		No
<input type="checkbox"/>	6 Alstott, Hayden		No
<input type="checkbox"/>	7 Amponsah, Elizabeth		No
<input type="checkbox"/>	8 An, Yu		No
<input type="checkbox"/>	9 Anderson, Kendrick		No
<input type="checkbox"/>	10 Angel, Roger		No
<input type="checkbox"/>	11 Asif, Syed		No
<input type="checkbox"/>	12 Atkinson, Michael		No
<input type="checkbox"/>	13 August, Tess		No
<input type="checkbox"/>	14 Austin, Griffin		No

Once you have selected a student, you will complete the appointment scheduling form. Take a look at the screenshot below of the appointment scheduling form.

Areas of Interest when scheduling an appointment:

Type: Choose Advising from the drop down for the type.

Topic: Fill in the topic of the Advising appointment.

Location: Fill in the location of the Advising appointment.

Attendees: Add additional attendees for the appointment if necessary.

Hello, UofL [Quick Search](#) | [Term: Fall 2011](#) | [Online Support](#) | [Log Out](#)

[My Calendar](#) >> Schedule an Appointment

Schedule an Appointment

Type:
 Advising Appointment

Topic:

Location:

Select a Date:

July 2011

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Reminders

Send an email reminder.

Send a text reminder.

People Attending (2) **Add an Attendee:**

Abner, Christopher (Student) [Remove](#)

Advisor, UofL (Advisor) [Remove](#)

Advisor for this Appointment [Reset your selection](#)

Advisor	Available Times
<input checked="" type="radio"/> Advisor, UofL	
<input type="radio"/> Bobbitt, Eddie	MTWRF 8:00a-5:00p
<input type="radio"/> Braun, Jenna	MTWRF 8:00a-5:00p
<input type="radio"/> Conrad, Deb	MTWRF 8:00a-5:00p

Select Times for the Appointment [Turn off Availabilities](#) Time increment: 30 min

Time Slot	07/24 (Sun)	07/25 (Mon)	07/26 (Tue)	07/27 (Wed)	07/28 (Thu)	07/29 (Fri)	07/30 (Sat)
6:00a-6:30a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6:30a-7:00a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7:00a-7:30a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7:30a-8:00a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8:00a-8:30a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8:30a-9:00a	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9:00a-9:30a	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9:30a-10:00a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:00a-10:30a	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:30a-11:00a	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:00a-11:30a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:30a-12:00p	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12:00p-12:30p	<input type="checkbox"/>	Conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12:30p-1:00p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1:00p-1:30p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1:30p-2:00p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Recurrence
 Does not repeat

Areas of Interest:

Conflicts: Scheduled events of the attendees of the appointment will display in red. Click on the link to display information regarding the conflict.

Recurrence: Determine if the appointment will be a recurring event. Choose the recurrence information and save the appointment.

Advising Reports

Advising reports or evaluations summarize what was discussed in an advising appointment. GradesFirst provides a standard form that provides a combination of yes/no questions with areas for subjective information input. To add an advising report simply select either a student or a recent event and click the Advising Report button.

Advisor Reporting

Recent Advisor Appointments Recent Reports You Created

Recent Advising Appointments

Select a student or past advising appointment and click Add Report or Advising Report

	Date	Topic	Attendee	Duration	Report Filed?
<input checked="" type="radio"/>	07/24/2011	Academic Planning	Biggs, Shannon	60 min	Not Yet.
<input type="radio"/>	07/22/2011	Degree Audit	Ebertson, Nick	30 min	Not Yet.
<input type="radio"/>	07/22/2011	General Advising	Mopar, Roy	60 min	Not Yet.
<input type="radio"/>	07/21/2011	Degree Audit	Kujun, Ivana	60 min	Not Yet.
<input type="radio"/>	07/21/2011	General Advising	Clean, Shantelle	60 min	Not Yet.

Create an Advising Report

Appointment Details

Appointment: 07/24/2011 4:00p-5:00p - Academi

Course:

Attendee

UofL Advisor

Arrived: 04:00 PM Departed: 05:00 PM

This person attended

Attendee

Shannon Biggs

Arrived: 04:00 PM Departed: 05:00 PM

This person attended

Report On: Shannon Biggs

Assignments Discussed

Objectives of the Session

Study Skills Used

Goals for Next Session

Notes on Advising Reports

- Adjust the time in the Arrived and Departed fields to represent the exact duration of the appointment.
- The fields on Advising Reports are not required. Complete only the portions you feel apply to your appointment.

Mark as No Show

If a student doesn't attend a scheduled appointment, you may mark them as a No-Show by un-checking the box next to 'This person attended'. This report resembles an Advising Report. However, an area of the report that says if the student attended the appointment is marked.

Create an Advising Report

Appointment Details

Appointment: 07/24/2011 4:00p-5:00p - Academi

Course:

When a student doesn't attend a scheduled appointment, mark them as a No Show

Attendee

UofL Advisor

Arrived	Departed
04:00 PM	05:00 PM

This person attended

Attendee

Shannon Bigs

Arrived	Departed
04:00 PM	05:00 PM

This person attended

Appointment Reminders And Comments

This will be saved on the report as a suggestion. No appointment will be created.

Suggested Time:

Suggested Date:

Additional Comments

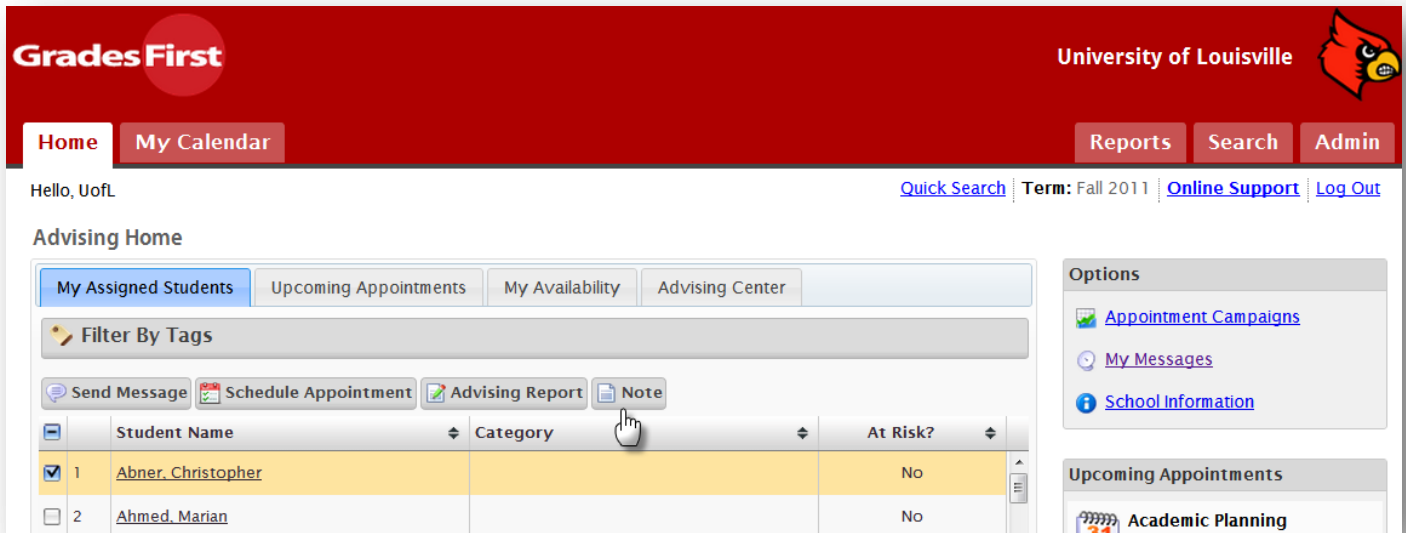
Save this Report

Depending on your school's settings, once a student is marked as a No-Show, GradesFirst will send an email to the student, the student's advisor or the student's coach.

Adding Notes

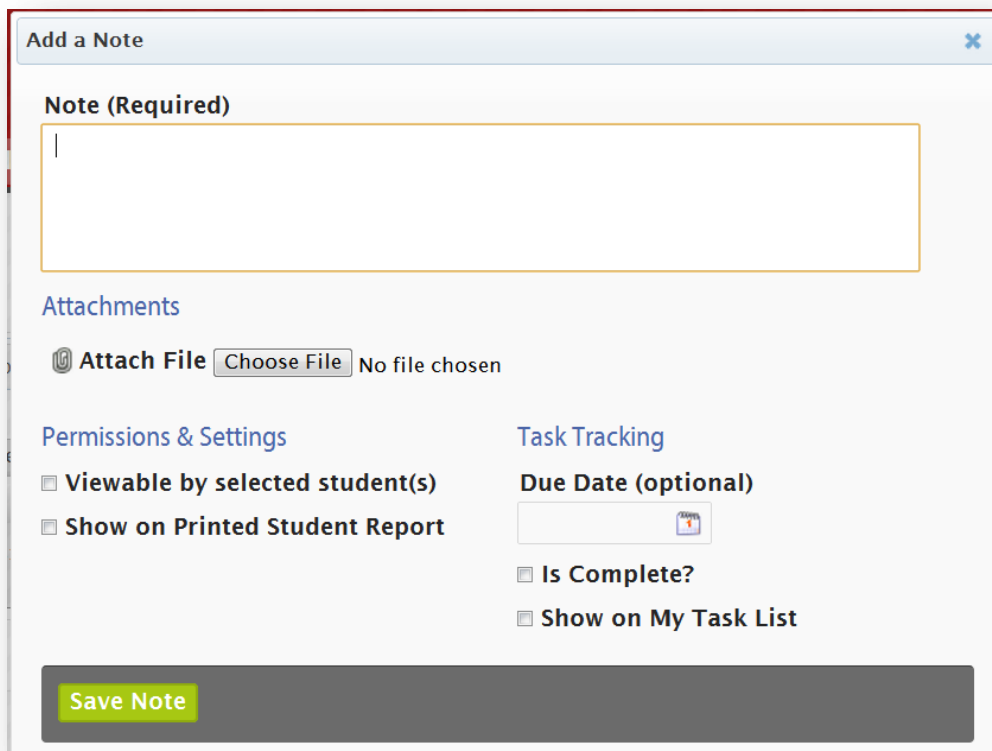
Adding notes to a student's profile is an effective way to communicate pertinent information internally to other faculty and staff or to the student. You can attach a document to a note.

To add a note, simply select a student or students and click the Note button.



The screenshot shows the GradesFirst interface for the University of Louisville. The top navigation bar includes 'Home', 'My Calendar', 'Reports', 'Search', and 'Admin'. The main content area is titled 'Advising Home' and features a table of 'My Assigned Students'. The table has columns for 'Student Name', 'Category', and 'At Risk?'. Two students are listed: Abner, Christopher and Ahmed, Marian. The 'Note' button is highlighted with a mouse cursor. On the right, there are sections for 'Options' (Appointment Campaigns, My Messages, School Information) and 'Upcoming Appointments' (Academic Planning).

	Student Name	Category	At Risk?
<input checked="" type="checkbox"/>	1 Abner, Christopher		No
<input type="checkbox"/>	2 Ahmed, Marian		No



The 'Add a Note' dialog box contains the following fields and options:

- Note (Required)**: A large text area for entering the note.
- Attachments**: An 'Attach File' button with a 'Choose File' button and the text 'No file chosen'.
- Permissions & Settings**:
 - Viewable by selected student(s)
 - Show on Printed Student Report
- Task Tracking**:
 - Due Date (optional)**: A date picker field.
 - Is Complete?
 - Show on My Task List
- Save Note**: A green button at the bottom.

Student View

By clicking on a student, you will be taken to the student's profile page. A student profile page displays Advisor Reports, Notes, Course Information and much more. The student's profile page has four tabs: Class Information, Appointments, Reporting, and Calendar. You will probably spend the majority of your time reviewing the Reporting tab. See a screen shot of the Reporting tab below.

Hello, UoFL [Quick Search](#) | Term: Fall 2011 | [Online Support](#) | [Log Out](#)

Eric Angell
Roles: Student

Class Information | Appointments | **Reporting** | Calendar

Advisor Reports

Date	Course	Follow-Up	Comment	
07/24/2011			We will meet again to discu...	Details

Tutor Reports

Date	Course	Follow-Up	Comment	
This student has not received any tutor reports for the current term.				

Notes About Student

[Add Note](#) [Mark as Complete](#) [Delete](#)

<input type="checkbox"/>	Date	Created By	Note	Complete?	Attachments	
<input type="checkbox"/>	06/28/2011	Neil Gibbs	THIS IS A TEST NOTE BY NEIL. PLEASE DISREGARD.	--	test-of-document.docx	edit

Recent Visits to the Student Support Centers

Date	Time	Location	Reason for Visit
Student has not had any recent visits to Student/Academic centers.			

Status: Normal

Not in Study Hall

Options

- [Send a Message](#)
- [Schedule an Appointment](#)
- [Advising Report](#)
- [Add a Note](#)

Personal Information

Email Address: adam@mailbox.edu

Student ID: 6437236

Date of Birth: 04/10/1990

Login Status: **Pending activation**

Facebook Status: **Not Installed**

Academic Information

Major: **SOCIOLOGY**

Cumulative GPA: **None reported.**

Total Credit Hours Earned: **30.0**

Total Credit Hours Attempted: **33.0**


Classes Attempted this Term: **0**

Semester Hours: **0**

Advisors: [Neil Gibbs UoFL Advisor](#)

Study Hall

Required	0min
Today	0min
This Week	0min
Last Week	0min



Areas of Interest

Advisor Reports: Display all advising reports about a student.

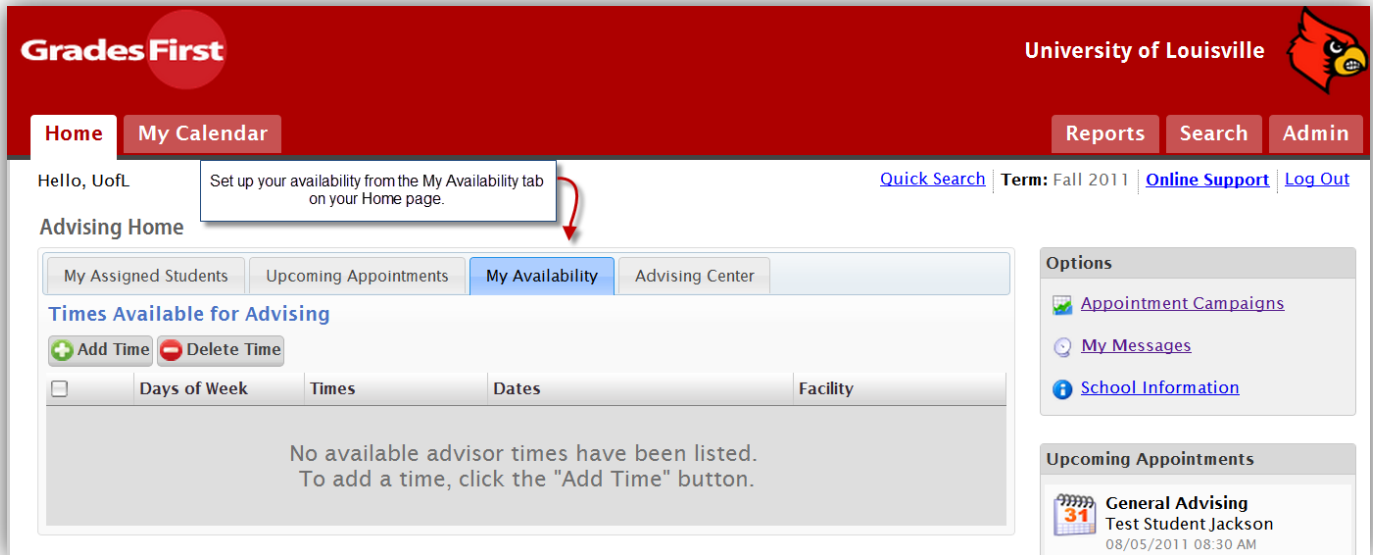
Notes: Displays notes written about the student.

Recent Visit to the Student Support Centers: Displays visits a student had to facilities set up in GradesFirst.

Academic Information: Display student information including Major, Cumulative GPA, Total Credit Hours Earned, Total Credit Hours Attempted, Classes Attempted this Term and Semester Hours. Typically, this information is imported from your school's Student Information System.

Setting up your availability within GradesFirst

Setting up your availability within GradesFirst is VERY important. This is how other users including Students, Support Staff and Advisors will schedule appointments with you. Setting up availability is simple. First click the My Availability tab from your Home page.



GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL Set up your availability from the My Availability tab on your Home page. Quick Search Term: Fall 2011 Online Support Log Out

Advising Home

My Assigned Students Upcoming Appointments **My Availability** Advising Center

Times Available for Advising

+ Add Time - Delete Time

<input type="checkbox"/>	Days of Week	Times	Dates	Facility
No available advisor times have been listed. To add a time, click the "Add Time" button.				

Options

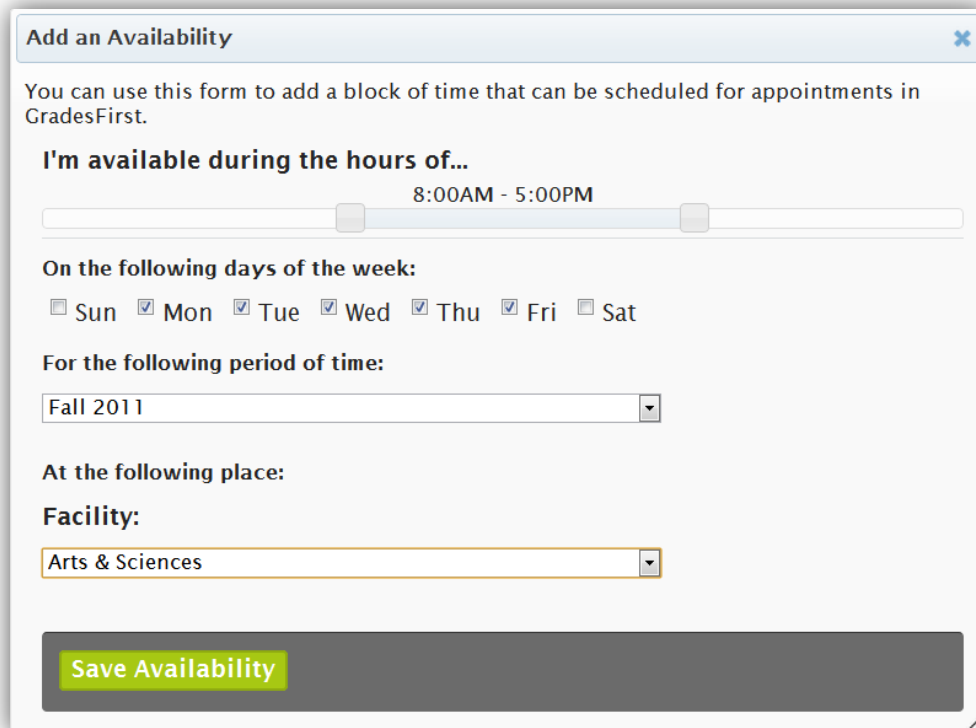
- Appointment Campaigns
- My Messages
- School Information

Upcoming Appointments

31 General Advising Test Student Jackson 08/05/2011 08:30 AM

Adding Time

To add time, simply click the Add Time button. Select the **Time Range**, **Days of the week**, **Time period** and the **Facility** you work with.



Add an Availability

You can use this form to add a block of time that can be scheduled for appointments in GradesFirst.

I'm available during the hours of...

8:00AM - 5:00PM

On the following days of the week:

Sun Mon Tue Wed Thu Fri Sat

For the following period of time:

Fall 2011

At the following place:

Facility:

Arts & Sciences

Save Availability

Adding Time

Areas of Interest:

Time Range: To set up 'blocks' of availability, simply move the time slider to the first block of time you'd like. For Example: 8AM – 12PM. Save the days of the week, time period and facility. Then click the Add Time button again and save your next 'block' of time such as 1PM – 4:30PM.

Days of the week: Select the days of the week you are available. If you aren't available on Wednesdays, leave the box next to Wednesday blank.

Period of time:

Term: The term time will display the current term for your school, which is set-up by your GradesFirst Administrator. If you are in the Fall Semester (Term), you will see Fall Semester in the drop down here. If you select this period of time, you will need to re-define your availability when the term changes.

Range of Dates: Choose the specific dates for which the time and days of the week you defined earlier apply. This works well if you know in advance that you will be out of town or that your schedule will change from week to week. ***Please note: it's best to use the Range of Dates period of time alone. Combining it with the Term availability or the Forever availability may produce unintended results.**

Forever: Choose this availability if you know your availability will not change from semester to semester or term to term.

Facility: It is **very important** that you select the correct facility for which you are associated.

Deleting Time:

To delete times from your availability, select the availability and click the Delete Time button.

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL Quick Search Term: Fall 2011 Online Support Log Out

Advising Home

My Assigned Students Upcoming Appointments My Availability Advising Center

Times Available for Advising

+ Add Time - Delete Time

To delete time, select the time 'block' you'd like to delete and click the Delete Time button.

<input checked="" type="checkbox"/>	Days of Week	Times	Dates	Facility
<input checked="" type="checkbox"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Fall 2011	Arts & Sciences

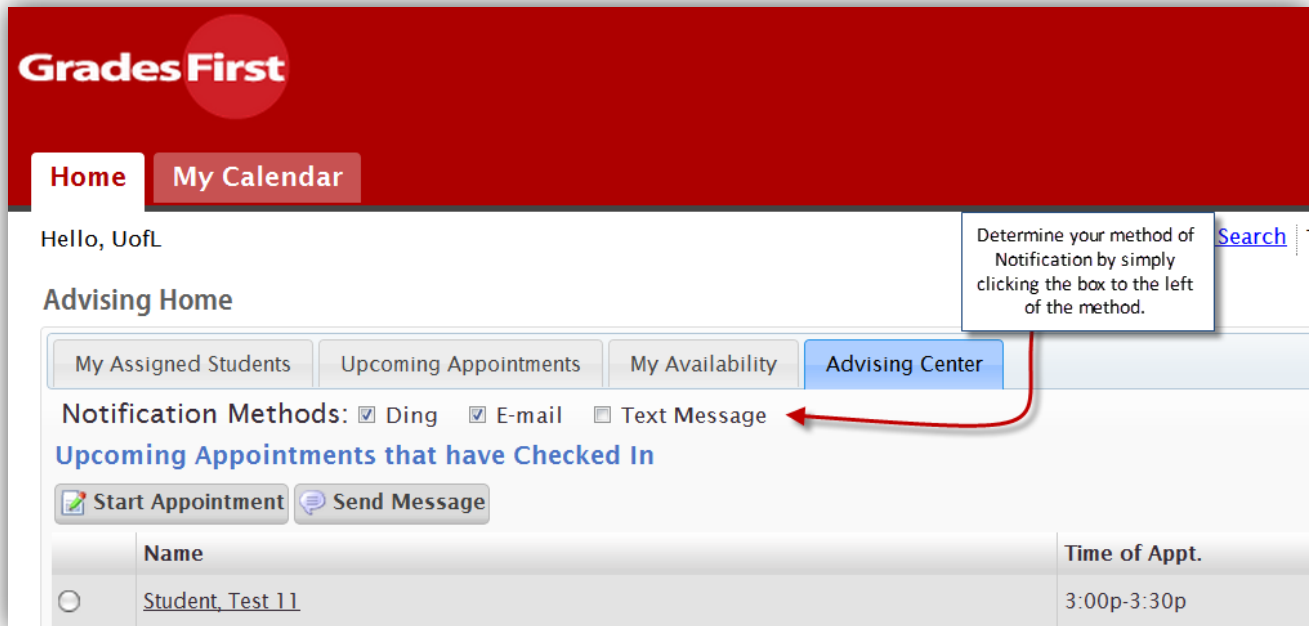
Options

- Appointment Campaigns
- My Messages
- School Information

Advising Center Tab

The Advising Center tab provides you with the ability to select your method of notification and initiate an appointment with your students. The Advising Center tab will refresh every 60 seconds.

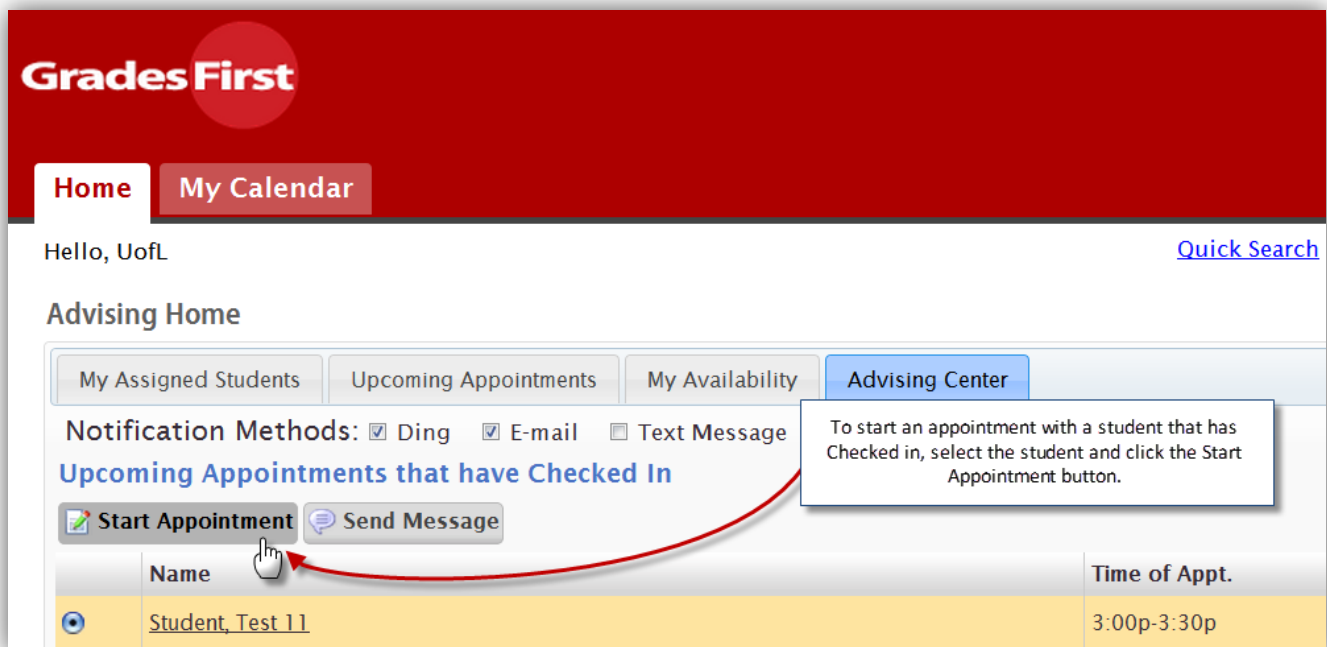
First, you'll need to select your method of notification. Choose from an audible Ding, an Email or a SMS text message (*Note you will want to verify UofL's text messaging policy before selecting the text message option).



The screenshot shows the GradesFirst interface with the 'Advising Center' tab selected. A callout box points to the notification methods section, stating: "Determine your method of Notification by simply clicking the box to the left of the method." The notification methods are: Ding, E-mail, and Text Message. Below this is a table titled "Upcoming Appointments that have Checked In" with columns for Name and Time of Appt. The table contains one entry: "Student, Test 11" with a time of "3:00p-3:30p".

Name	Time of Appt.
Student, Test 11	3:00p-3:30p

To begin an appointment with a student who has checked in, select that student from the Upcoming Appointments that have Checked In area and click the Start Appointment button.



The screenshot shows the same GradesFirst interface, but now the student "Student, Test 11" is selected in the table, indicated by a blue circle and a yellow background. A callout box points to the "Start Appointment" button, stating: "To start an appointment with a student that has Checked in, select the student and click the Start Appointment button." The "Start Appointment" button is highlighted with a red arrow.

Name	Time of Appt.
Student, Test 11	3:00p-3:30p

After clicking the Start Appointment button, an advising report will display. You **do not** have to complete the advising report right away. If you'd like to log your notes later, simply click the "X" at the top right of the report.

The appointment will appear at the bottom of the Advising Center tab with your Recent Appointments. You can also access the appointment from your Home page in the Recent Appointments area.

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL Quick Search Term: Fall 2011 Online Support Log Out

Advising Home

My Assigned Students Upcoming Appointments My Availability **Advising Center**

Notification Methods: Ding E-mail Text Message

Upcoming Appointments that have Checked In

Start Appointment Send Message

Name Time of Appt.

You do not have any student appointments checked in

Students in My Queue

Start Appointment Not Attended To Send Message Remove

Name First Available Checked In At

You do not have any students currently waiting

Students in Queue for Other Advisors

Start Appointment Not Attended To Send Message Remove

Name Advisor Checked In At

There are currently no students waiting on other advisors

Options

- Appointment Campaigns
- My Messages
- School Information

Upcoming Appointments

- General Advising**
Test Student Jackson
08/05/2011 08:30 AM
- Academic Planning**
Test Student 32
08/10/2011 02:30 PM
- Fall Course Registration**
Student Test 21
08/15/2011 09:45 AM
- Schedule your Fall Appointment**
Student Test 21
08/16/2011 11:15 AM

Advisor Reporting

Recent Advisor Appointments Recent Reports You Created

Recent Advising Appointments

Add Report Mark No-Show

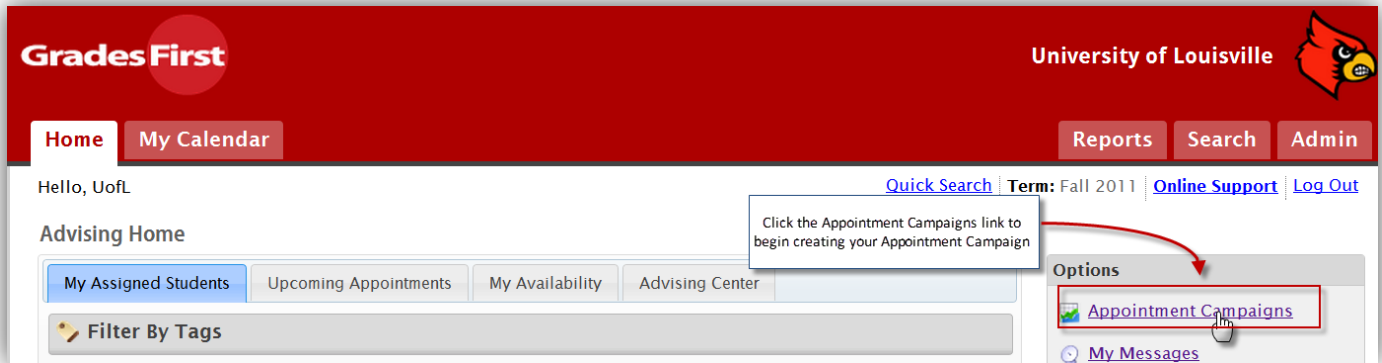
You do not have to complete your Advising Report immediately following an appointment. Complete the report when you're ready from your Recent Advising Appointments area.

	Date	Topic	Attendee	Duration	Report Filed?
<input type="radio"/>	08/04/2011	Academic Planning	Student_Test 11	30 min	Not Yet.
<input type="radio"/>	08/04/2011	Academic Planning	Test 20_Student	30 min	Details
<input type="radio"/>	08/04/2011	General Advising	Test 20_Student	60 min	Not Yet.
<input type="radio"/>	08/03/2011	Academic Planning	Test 20_Student	30 min	Not Yet.
<input type="radio"/>	08/02/2011	Academic Planning	Test_Ashley	30 min	Not Yet.
<input type="radio"/>	08/02/2011	Academic Planning	Test_Ashley	30 min	Not Yet.
<input type="radio"/>	08/02/2011		Test 20_Student	30 min	Not Yet.
<input type="radio"/>	08/01/2011	General Advising	Abner_Christopher	30 min	Not Yet.
<input type="radio"/>	07/29/2011	Academic Planning	Ebertson_Nick	30 min	Not Yet.
<input type="radio"/>	07/28/2011	Academic Planning	Presley_Elvis	30 min	Not Yet.

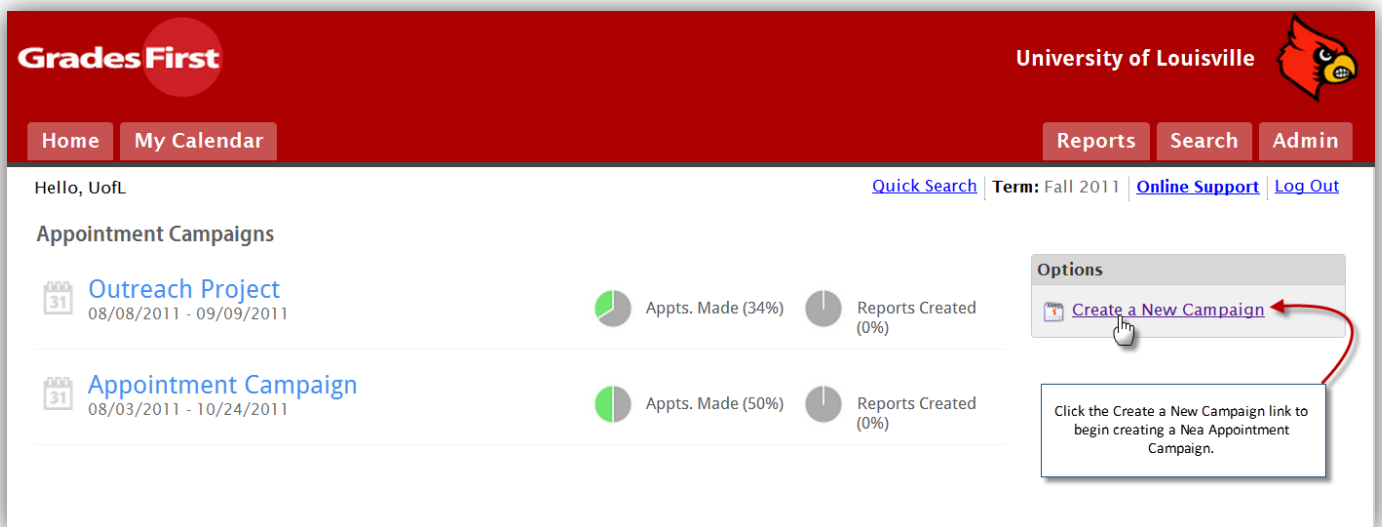
« previous 1 2 3 4 next »

Appointment Campaigns

Appointment campaigns allow you to send an email request to your students informing them of when you would like them to schedule an appointment with you. To create an appointment campaign, simply click the Appointment Campaign link in the Options box on your Home page. From there, simply define the parameters of your campaign and send it to your selected students.



By clicking the Appointment Campaign link you will be redirected to your Appointment Campaign Dashboard. We will discuss this Dashboard a bit later in this document. To create a new Appointment Campaign, click the Create a New Campaign link.



Once you click the Create a New Campaign link, you will need to complete the 3 steps listed on the Appointment Campaign creation page.



Hello, UofL

Quick Search Term: Fall 2011 Online Support Log Out

Appointment Campaigns > New

Create an Appointment Campaign

Follow the steps to the right to build your appointment campaign. You will define the campaign, select students and then email the campaign.

Step 1: Define The Campaign

Name of Campaign:

The Name of the Campaign can be something unique to you.

Topic of Appointment:

The Topic of Appointment will appear in the subject of the email the student receives.

Location:

Your Availability:

Defined in your advisor settings, these are the times you will show as available for appointments.

MTWRF 8:00a-5:00p

Your Availability will be pulled in from the availability you have defined within the system.

Provide a Start and End Date for the campaign and Determine the length of the appointments

Start Date:

End Date:

Length of the Appointments:

Special Instructions to Student:

Special Instructions will appear in the body of the email the Students receive.

Decide to Send the students to ALL of your assigned students or select the specific students you'd like to sent the campaign to.

Step 2: Select Your Recipients

Send request to all my assigned students.

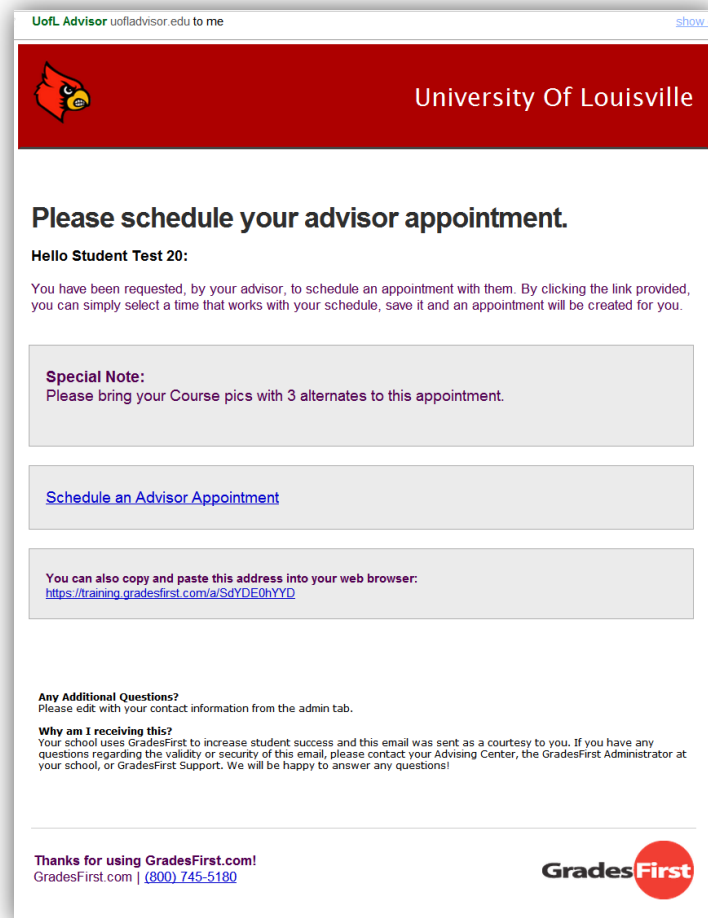
Send this request to specific students that I select.

Step 3: Send The Campaign

Finally, Send the Campaign

Send Appointment Requests

Now that you've filled out the information for your Appointment Campaign and clicked the Send Appointment Requests button, your students will receive an email. Within the email, they'll have a link to click to complete the Appointment Campaign. Review the screen shots below.



When the student clicks the link included in the email, they will be taken to an appointment scheduling screen. The student will pick the day and time along with the type of reminder they would like to receive regarding the appointment.

Review the screen shot below of the student's view of scheduling an appointment from an Appointment Campaign.



Schedule an Advising Appointment

Basics

Topic:
Schedule your Fall Appointment

Location:
RM 221 A&S Building

Advisor:
UofL Advisor

Special Instructions:
Please bring your Course pics with 3 alternates to this appointment.

Reminders

- Send an email reminder.
- Send a text reminder.

Cell Phone Number:

Create This Appointment

The Student will select their appointment reminder type, and click the Create This Appointment button.

If the student has a Course or an Appointment scheduled, it will appear in Red.

The students will select a date based on the Begin and End Date you entered when creating the campaign

Step 1: Choose a Date to Meet

Only days that have times available will be selectable.

August 2011							September 2011							October 2011						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6	4	5	6	7	8	9	10	2	3	4	5	6	7	8
7	8	9	10	11	12	13	11	12	13	14	15	16	17	9	10	11	12	13	14	15
14	15	16	17	18	19	20	18	19	20	21	22	23	24	16	17	18	19	20	21	22
21	22	23	24	25	26	27	25	26	27	28	29	30	23	24	25	26	27	28	29	
28	29	30	31										30	31						

Step 2: Choose a Time to Meet

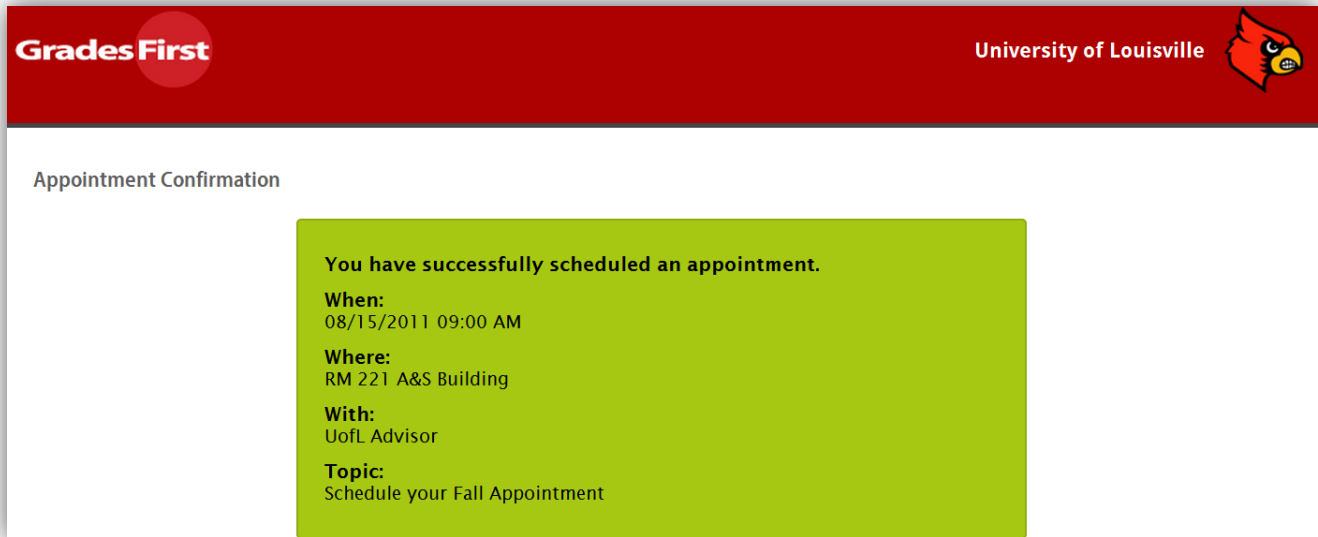
Select a time and then save the appointment.

Times for: Aug 15 2011

- 8:00a-8:15a
- 8:15a-8:30a
- 8:30a-8:45a
- 8:45a-9:00a
- 9:00a-9:15a
- 9:15a-9:30a
- 9:30a-9:45a
- 10:00a-10:15a
- 10:15a-10:30a
- 10:30a-10:45a
- 10:45a-11:00a
- 11:00a-11:15a
- 11:15a-11:30a
- 11:30a-11:45a
- 11:45a-12:00p
- 12:00p-12:15p
- 12:15p-12:30p
- 12:30p-12:45p
- 12:45p-1:00p
- 1:00p-1:15p (You have something scheduled at this time)
- 1:15p-1:30p (You have something scheduled at this time)
- 1:30p-1:45p (You have something scheduled at this time)

The student can select a time slot in the increment you defined when creating the campaign.

Once the student has scheduled their appointment, an appointment confirmation page will appear. The link in the email from the appointment campaign is no longer active once an appointment had been scheduled. This will prevent students from creating duplicate appointments within the same appointment campaign.

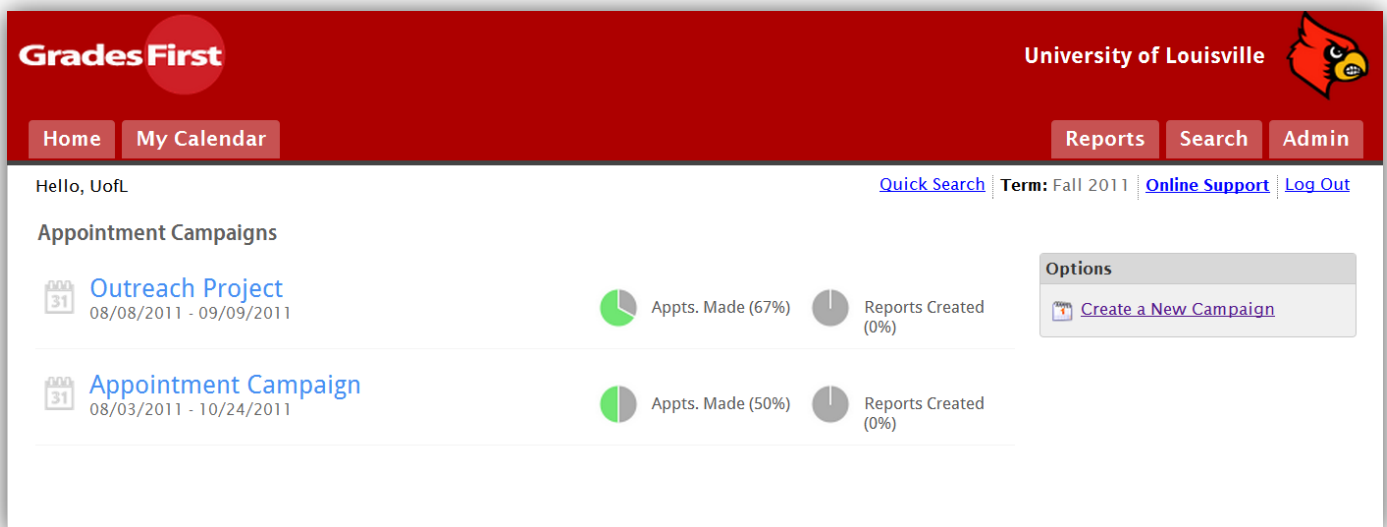


The screenshot shows the 'Appointment Confirmation' page. At the top, there is a red header with the 'GradesFirst' logo on the left and 'University of Louisville' with a cardinal logo on the right. Below the header, the page title 'Appointment Confirmation' is displayed. A large green box contains the following information:

- You have successfully scheduled an appointment.**
- When:** 08/15/2011 09:00 AM
- Where:** RM 221 A&S Building
- With:** UofL Advisor
- Topic:** Schedule your Fall Appointment

Appointment Campaign Dashboard

Once you have sent an appointment campaign, you can observe and track the results from your Appointment Campaign Dashboard. To access the dashboard simply click the Appointment Campaign link in your Options box. You will first be presented with a visual representation of: a) How many students have responded to your request and b) How many reports you have created that are linked to this Appointment Campaign. Clicking on the Name of the Appointment Campaign will display more details regarding the campaign. We will discuss these details below.



The screenshot shows the 'Appointment Campaign Dashboard'. At the top, there is a red header with the 'GradesFirst' logo on the left and 'University of Louisville' with a cardinal logo on the right. Below the header, there are navigation buttons: 'Home', 'My Calendar', 'Reports', 'Search', and 'Admin'. The main content area starts with 'Hello, UofL' and navigation links: 'Quick Search', 'Term: Fall 2011', 'Online Support', and 'Log Out'. The 'Appointment Campaigns' section lists two campaigns:

- Outreach Project** (08/08/2011 - 09/09/2011): Apts. Made (67%), Reports Created (0%)
- Appointment Campaign** (08/03/2011 - 10/24/2011): Apts. Made (50%), Reports Created (0%)

An 'Options' box on the right contains a 'Create a New Campaign' button.

Appointments Made tab

This displays the students that have responded to your Appointment Campaign. From this tab you may: Send a Message, Add a Note, Add a Tag or edit the appointment details by clicking the View Details link.

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL [Quick Search](#) Term: Fall 2011 [Online Support](#) [Log Out](#)

[Appointment Campaigns](#) > Outreach Project

Outreach Project
08/08/2011 - 09/09/2011

Appointments Made Appointments Not Yet Made Reports Created

Send a Message Add Note Add Tag

	Appt Date	Appt Time	Student	At-Risk?	Appt Created On		
<input type="checkbox"/>	1	08/15/2011	9:00a-9:15a	Test 20, Student	No	08/05/2011	View Details
<input type="checkbox"/>	2	08/16/2011	11:15a-11:30a	Test 21, Student	Yes	08/04/2011	View Details

Options

[Edit This Campaign](#)

Campaign Information

Name / Appointment Topic
Schedule your Fall Appointment

Location
RM 221 A&S Building

Default Appointment Length
15min

Start Date
08/08/2011

End Date
09/09/2011

Campaign Created On
08/04/2011

View the students who have responded to your appointment Campaign

Edit the Appointment

Displays the Details of the Appointment Campaign

Edit This Campaign

By clicking this link, you have the ability to Edit/Alter the campaign to send to additional students. This will not affect the students you have already sent the campaign to. However, you can send the campaign to additional members of your student populations. Refer to page 19 to observe what this page will resemble.

Appointments Not Yet Made tab

This tab displays the students who have not yet responded to your Appointment campaign. You may quickly send those students a message or resend the request. Students who have already responded to your Appointment Campaign will not be displayed here.

The screenshot shows the GradesFirst interface for the University of Louisville. The top navigation bar includes 'Home', 'My Calendar', 'Reports', 'Search', and 'Admin'. The main content area is titled 'Outreach Project' with dates '08/08/2011 - 09/09/2011'. It features three tabs: 'Appointments Made', 'Appointments Not Yet Made' (which is selected), and 'Reports Created'. Below the tabs are four action buttons: 'Resend Appointment Request', 'Send a Message', 'Add Note', and 'Add Tag'. A table lists one student: 'Student Test 11' with email 'n0gibb01@gwise.louisville.edu'. A callout box explains that only students who have not responded will appear here. Another callout box points to the 'Resend Appointment Request' button, stating that it is used to resend the campaign to those who have responded. On the right, there are sections for 'Options' (with an 'Edit This Campaign' link) and 'Campaign Information' (including location 'RM 221 A&S Building', start/end dates, and creation date).

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL [Quick Search](#) Term: Fall 2011 [Online Support](#) [Log Out](#)

[Appointment Campaigns](#) > Outreach Project

Outreach Project
08/08/2011 - 09/09/2011

Appointments Made **Appointments Not Yet Made** Reports Created

Resend Appointment Request Send a Message Add Note Add Tag

<input type="checkbox"/>	Student	Email
<input type="checkbox"/>	1 Student_Test 11	n0gibb01@gwise.louisville.edu

Options
[Edit This Campaign](#)

Campaign Information

Name / Appointment Topic
Schedule your Fall Appointment

Location
RM 221 A&S Building

Default Appointment Length
15min

Start Date
08/08/2011

End Date
09/09/2011

Campaign Created On
08/04/2011

Only students who have not responded to your campaign will appear here.

Choose to resend the campaign to those students who have responded.

Reports Created tab

From the Reports created tab you can view any reports you have created that are linked to your Appointment Campaign.

The screenshot displays the GradesFirst University of Louisville interface. At the top, there is a red header with the 'GradesFirst' logo on the left and the 'University of Louisville' name and logo on the right. Below the header, navigation buttons for 'Home', 'My Calendar', 'Reports', 'Search', and 'Admin' are visible. The main content area shows a user greeting 'Hello, UofL' and navigation links for 'Quick Search', 'Term: Fall 2011', 'Online Support', and 'Log Out'. The current page is titled 'Appointment Campaigns > Outreach Project' and 'Outreach Project 08/08/2011 - 09/09/2011'. A callout box with a red arrow points to the 'Reports Created' tab, containing the text: 'Quickly review your advisor notes related to your Appointment campaign.' Below this, there are tabs for 'Appointments Made', 'Appointments Not Yet Made', and 'Reports Created'. Action buttons include 'Send a Message', 'Add Note', and 'Add Tag'. A table lists appointment reports with columns for checkboxes, Date, Student Name, Comment, Follow-Up?, and Details. The table contains one entry for '08/05/2011' with student 'Test 21, Student' and comment 'Everything is handled. The hold has been lifted.' To the right, there are sections for 'Options' (with 'Edit This Campaign' link), 'Campaign Information' (including Name/Topic, Location, Default Appointment Length, Start Date, End Date, and Campaign Created On).

GradesFirst University of Louisville

Home My Calendar Reports Search Admin

Hello, UofL [Quick Search](#) Term: Fall 2011 [Online Support](#) [Log Out](#)

[Appointment Campaigns](#) > Outreach Project

Outreach Project
08/08/2011 - 09/09/2011

Appointments Made Appointments Not Yet Made **Reports Created**

[Send a Message](#) [Add Note](#) [Add Tag](#)

<input type="checkbox"/>	Date	Student Name	Comment	Follow-Up?	
<input type="checkbox"/>	08/05/2011	Test 21, Student	Everything is handled. The hold has been lifted.	No	Details

Options
[Edit This Campaign](#)

Campaign Information
Name / Appointment Topic
Schedule your Fall Appointment
Location
RM 221 A&S Building
Default Appointment Length
15min
Start Date
08/08/2011
End Date
09/09/2011
Campaign Created On
08/04/2011