

### **What is GradesFirst?**

GradesFirst facilitates better, stronger collaborations and gives you the data to measure those collaborations: Student Success. It's a holistic student support platform that provides you with the tools to identify, intervene, and engage with students to lead them on a successful path, while giving you the ability to measure and assess those relationships to ensure that the intervention is successful.

### **What GradesFirst can do for you?**

- Enhanced Early Alert System to identify at-risk students early in the semester
- Straightforward Advising Summary Reports
- Tracking of specific groups (freshmen, honor students, athletes, etc.)
- Track attendance (class, events, workshops, visits, etc.)

GradesFirst seeks to promote academic success for students by:

- Providing students timely support and direction to appropriate campus resources
- Encouraging students to utilize campus resources and to also communicate with professors, advisors and the department chairperson regarding concerns
- Making the college transition process more enjoyable by providing more opportunity for academic success

Top 3 features advisors like most about GradesFirst:

1. Ability to submit and manage advising reports and notes
2. Ability to schedule appointment with their students
3. Ability for new advisors to see notes and reports of past advisors

### **Faculty's Role**

Faculty can easily identify which students need additional help and notify both students and advisors, who can then assist students with additional support, tutoring, or referrals. Since many faculty advise, you might have two roles on GradesFirst: Professor and Advisor.

### **Student's Role**

Students are able to request tutoring, create an appointment with their advisor (if permitted by the department), and correspond with their professor.

For a full list of manuals, please visit: <http://bit.ly/2dXnCDP>

Have additional questions or need technical support with GradesFirst?

Please contact [gradesfirst@csufresno.edu](mailto:gradesfirst@csufresno.edu)

# Advisor Quick Start Guide

## Step 1: Request Access

Users requesting access to the Advising role in GradesFirst must also have pre-approved access to SA Advising in PeopleSoft. This is given typically to professional staff and faculty advisors and those individuals who work directly with student records and have been approved by management. GradesFirst Advisors will have access to the student profile page.

## Step 2: Create Availability

Once given access as an Advisor, availability in GradesFirst is the **ONLY** way appointments can be scheduled. Appointments can include student appointments or even appointments with other advisors.

**QUICK TIP:** Create availability for hours you will accept advising appointments. If you need to schedule an appointment outside of those hours, as an advisor, you can override the available times.

## Step 3: Inform Your Students

All student appointment reminders will be defaulted to send a text message reminder to the students. Students must have their cell phone number listed as “mobile” in PeopleSoft to receive texts. If not, they will get an email reminder instead.

**QUICK TIP:** If a student does NOT want to receive text messages, please email [gradesfirst@csufresno.edu](mailto:gradesfirst@csufresno.edu).

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# Section 1: Getting Started

## Logging into GradesFirst

Log into your GradesFirst account, your user name and password are the same as your Fresno State email.

1. Click the GradesFirst Academics link from the My Fresno State portal OR
2. Click the GradesFirst link on Blackboard OR
3. Go to [fresnostateacad.gradesfirst.com](http://fresnostateacad.gradesfirst.com) and use your Fresno State login/password

**My Menu**

- ▷ Employee Self Service
- ▷ Faculty Self Service
- ▷ Student Self Service
- ▷ Curriculum Management
- ▷ HR Transactions
- ▷ Student Support
- ▷ eRecruit
- ▷ Reports Portfolio
- ▷ Forms Portfolio
- ▷ PAWS Action Request Tracker
- ▷ Security Requests
- ▷ Reporting Tools
- ▷ PeopleTools
- [ID Search](#)
- [Lynda.com](#)
- [PeopleSoft HCM](#)
- [Blackboard](#)
- [HireTopDogs](#)
- [Student Clubs & Organizations](#)
- [Bizflow Workflow](#)
- [GradesFirst-Academics](#) ← **My Fresno State**
- [Access Google Apps/Mail](#)
- [Access Zimbra/Mail](#)
- [Concur Travel](#)
- [Kuali Ready](#)
- [Change My Password](#)



**Hot Links**

- [Campus Homepage](#)
- [My Fresno State](#)
- [Fresno State News](#)
- [Faculty Email](#)
- [Student Email](#)
- [Technology Innovations for Learning and Teaching \(TILT\)](#)
- [Help Center](#)
- [Madden Library](#)
- [GradesFirst \(Academics\)](#) ← **Blackboard**

## Request Access for Advisor Role

All advisors (professional or student) will gain advisor access to GradesFirst when they are approved access to PeopleSoft, DPR, etc.

**NOTE:** You need to ensure that the advisor (professional or student) is linked to your office thru Human Resources documentation so that the necessary approvals are routed to the correct person(s). Please ensure that the person has been hired into your department either as an employee or volunteer since security requests will go to the Dean of the department.

1. Log onto [my.fresnostate.edu](http://my.fresnostate.edu)
2. From My Menu, select Security Requests
3. Select New Security Request
4. Select User Security. Select 
5. Enter the ID of the person who needs advising access or enter the department (if you are going to submit the request for multiple people within the same department.)
6. Check on the box next to the user and select Add.
7. Verify the correct person was select and select 
8. Under Campus Solutions (HCM) select the Student Advising (Non-Faculty) option or Student Advising (Student Advisors) depending on if the request is for professional staff or student advisor.
- 9.

- Student Advising (Non-Faculty)**  
This Student Administration role is given to staff supporting or providing Student Advising. It grants access pertaining to student advising, Unofficial Transcripts, DARS and the support of Faculty Advisors required by Academic departments, including Advisement and DARS links located in My Fresno State under Student Support folder. It also grants access to the Academic version of GradesFirst.

GradesFirst is a student advising application used by the campus to track advising sessions and information for students.



\*\*\* GRANTS ACCESS TO VIEW GRADES \*\*\*

- Student Advising (Student Advisors)**  
This Student Administration role is given to STUDENTS supporting or providing Student Advising. It grants access pertaining to student advising, Unofficial Transcripts, DARS and the support of Faculty Advisors required by Academic departments, including Advisement and DARS links located in My Fresno State under Student Support folder. It also grants access to the Academic version of GradesFirst.

GradesFirst is a student advising application used by the campus to track advising sessions and information for students.

\*\*\* GRANTS ACCESS TO VIEW GRADES \*\*\*

Select 

10. For staff, choose Permanent Access. For students, enter the appropriate date range (one academic year maximum). 
11. In the text box, enter an explanation for the request.
  - a. *If Front Desk Access is being needed, you would put the request here. (For example: Please give Front Desk access for the University Advising Center.)*
12. Select 

## Zimbra Calendar Integration

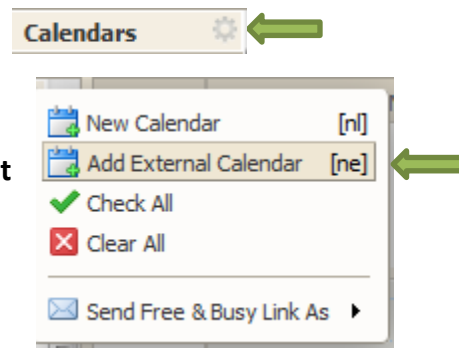
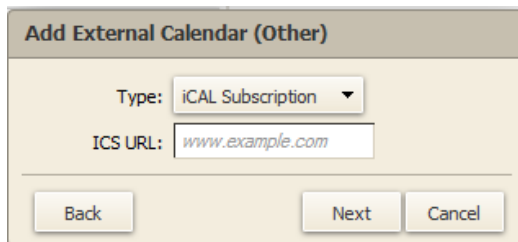
There is a one-time set-up process that needs to be established in order for your GradesFirst calendar and Zimbra calendar to be integrated. GradesFirst will communicate information about appointments to Zimbra. Zimbra will not communicate information from Zimbra to GradesFirst.

### Step 1: Get Your GradesFirst calendar feed URL

- In GradesFirst, navigate to the **Calendar** icon (in blue bar on the left)
- Click the **Subscriptions** tab
- Click on **Setup Calendar Integration**
- On the **External Calendaring Setup** tab, you will see a URL displayed; beginning with “webcal://” It is located within the gray box. Select the text of this URL and copy it to your clipboard (Control + C)

### Step 2: Subscribe to your GradesFirst calendar

- Navigate to Zimbra
- Click on the **Calendar** tab
- Click on the Options icon near the Calendars menu
- Select **Add External Calendar**
- Select **Add External Calendar (Other)**, then click **Next**



- Type: choose **iCAL Subscription**
- ICS URL: Paste your GradesFirst calendar URL into this field (Control +V)
- Click **Next**
- Enter a name for your calendar. For example, “GradesFirst Calendar” or “Advising Calendar”
- Click **OK**

You should now see a new calendar under your Calendars in Zimbra. It may take a few minutes for your events to display.



## Google Calendar Integration

### Step 1: Get Your GradesFirst calendar feed URL

In GradesFirst, navigate to the Calendar tab.

Click the Subscriptions tab.

Click on Setup Calendar Integration.

On the External Calendaring Setup tab, you will see a URL displayed, beginning with "webdav://".

Select the text of this URL and copy it to your clipboard (Control + C).

### Step 2: Subscribe to your GradesFirst calendar

Navigate to Google Calendar.

Click on the down arrow to the right of Other calendars.

Select Add by URL.

Paste your GradesFirst calendar URL into the URL field.

Click Add Calendar.

You should now see a new calendar under Other calendars. It may take a few minutes for your events to display.

Publish your Google calendar events to GradesFirst

Calendar subscription is a tool that allows you to integrate your Google calendar with your GradesFirst calendar. Once this subscription is complete, your calendars will sync and you will see your Google calendar events listed on your GradesFirst calendar.

To synchronize your Google Calendar events into your GradesFirst calendar:

1. From your Calendar tab click the Subscriptions tab.
2. On the Subscriptions tab, click Setup Free/Busy Integration.
3. Click the Google Apps Integration tab.
4. On the Google Apps Integration tab, click Connect with Google.
5. In the Sign in – Google Accounts dialog, users should find their Google account as an option. If your Google account is not listed, click the Add Account option and login to your Google account.
6. In the Request for Permission dialog, click the Accept button to continue.
7. Select which Google calendar, or calendars, you wish to add to GradesFirst.
8. Click Save.

After all calendar's have been selected/synced, click on the Calendar tab to view your newly added events. If your events do not immediately appear, click your browser's refresh button. Please note, it may take a few minutes for your calendars to synchronize. Once synchronized, any events added to your Google calendar will automatically be added to your GradesFirst calendar as "Busy" events.

# Section 2: Advisor Role

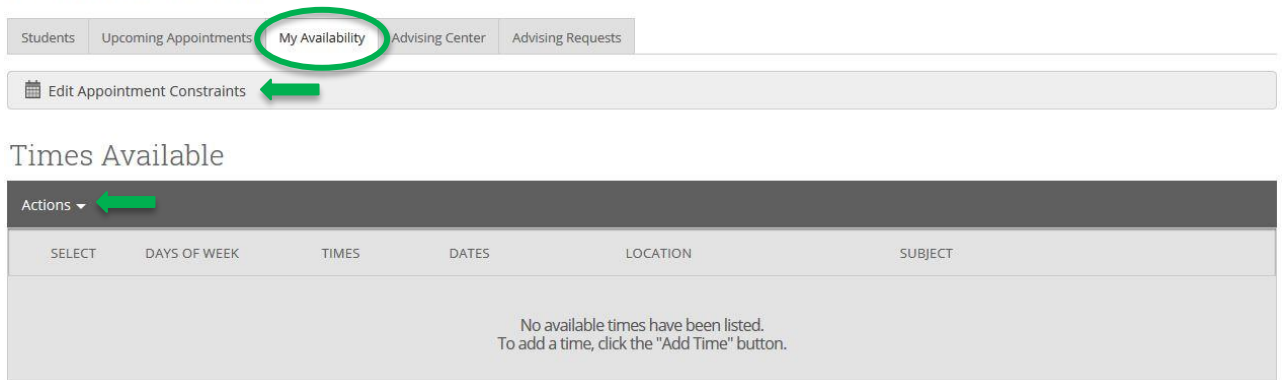
## Advisor Availability

In order for students to schedule an appointment with an advisor, you must have your availability set up in GradesFirst. You do not need to have availability to create an advisor report for a student.

## Appointment Constraints

Step 1: To set up your availability, you want to click the “My Availability” tab on the **Advisor Home** screen.

### Advisor Home



Step 2: The first step is to define the parameters that control your availability for the appointments. First, click the **Edit Appointment Constraints** option.

When clicked, these options are available for you to define:

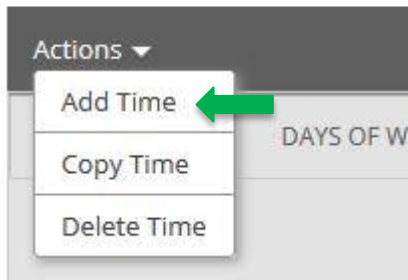
**Hours in Advance** refers to how many hours, from the current time, a student must wait before they can schedule an appointment. This setting only applies to students making appointments.

**Default Appointment Length** is the default length of this specific advisor’s appointment. This can be overridden by users with the appointment create permission, except by students, during appointments creation.

**Require available times for student** means that advisors must have defined *Times Available* before a student can create an appointment with them. If this box is not checked, students are able to schedule with that advisor at any time and day. This box is checked by default. It is highly recommend that advisors use this default during setup.

Step 3: The next step is to define the days and times you will be available to meet with students. It is important to note that locations and services are created by administrators. If you have questions about any locations or services set, please contact your GradesFirst Administrator.

## Times Available



## Creating Availability

Step 1: Switch to the **My Availability** tab and click the **Add Time** button. You can have as many availabilities as needed.

# Advisor Home

Students   Upcoming Appointments   **My Availability**

 Edit Appointment Constraints

## Times Available

Actions ▾

- Add Time**
- Copy Time
- Delete Time

DAYS OF WEEK   TIME

Step 2: Select the days and times when you are available to meet with students.

ADD AVAILABILITY ✕

I'm available on

**Mon**   Tue   **Wed**   Thu   **Fri**   Sat   Sun

8:00a - 12:00p

for   Drop-ins   **Appointments**   Campaigns

Fall 2016

Learning Center (Library Collections Level) 559.278.3052

SupportNet (Academic Coaching) ✕

details

Cancel   **Save**

**NOTES:** Comment are optional. Comments are seen by the student.

Step 3: Select whether you will meet with students via appointments, drop-ins, or campaigns during that time.

(**Note:** If all three then you will need to make separate availabilities for each.)

Step 4: Choose the duration (range of dates, semester, or forever).

Step 5: Choose the location where you will be available.

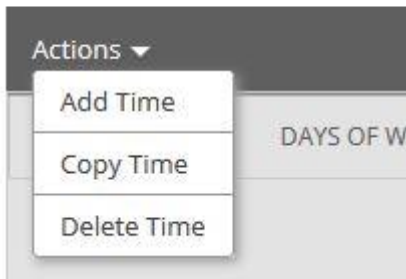
Step 6: Lastly, select which student services you can provide to students during this availability. (**Note:** Leaving this student services field empty means you will appear to be available for all advising student services.)

Step 7: Click the **Save** button. Repeat this process until all of your availabilities have been defined.

### *Other options*

There are two other options when adding **Times Available**.

## Times Available



**Copy Time** – To copy a time, select the time you would like to copy and then click the **Copy Time** button.

The availabilities will be copied and a dialog will open, allowing you to make edits or to save your newly created availability.

**Delete Time** – To delete your time, simply select and click the **Delete Time** button.

**Note:** Inactive availabilities are highlighted in **red** in the **Times Available** grid.

## Advisor Reports and Notes

To create an advising report for a drop-in advising session:

1. From the student homepage, click the Advising Report link on the right hand side.
2. The system will then display the **Create an Advising Report** dialog. Every field on this form is optional, so only fill out the fields that are relevant for you and your office (see Supervisor to determine what information your office requires.)

To create an advising report for a scheduled appointment:

3. The advising report will automatically generate when you start the appointment from your student que or...
4. On the advisor homepage, visit the Advisor Reporting Section. Identify the student appointment and click the Advising Report button.

**Note:** Advisor Reports are viewable to all advisors on campus.

5. Fill out Advisor Report. **Reminder:** Your office will have specific requirements on what they would like completed on the advisor report. Please confirm with your Supervisor for proper documentation.
6. Once you have completed the report, review the arrived and departed time, and click on **Save This Report**.

### ADVISING REPORT FOR BULL DOG

#### Appointment Details

An appointment will be created after you submit this report.

Reason:

Meeting Type:

Course:

Date of visit:

Location:

#### Attendees

**Monica Quintero**  
Advisor, Super User  
 Attended  
Arrived:  Departed:

**Bull Dog - 123456789**  
 Attended  
Arrived:  Departed:

#### Suggested Followup

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

Date:  Time:

#### Report Details For Bull Dog

Assignments Discussed:

Objectives of the Session:

Study Skills Used:

Goals for Next Session:

Student arrived on time and was ready to begin our session.  Yes  No  N/A

Student was prepared (attended class, read lesson, had notes, etc.)?  Yes  No  N/A

Student asked for explanation of material not understood?  Yes  No  N/A

Student responded positively to instruction (as you suggested)?  Yes  No  N/A

Student was aware of future assignments?  Yes  No  N/A

Student shows a better understanding of the material since our last session.  Yes  No  N/A

#### Appointment Summary

Enter advisor notes here about what was discussed during the appointment.

- 1. spring registration
- 2. graduation
- 3. SMART goals
- 4. etc.

#### Attachments

No file selected.

# Section 3: Scheduling & Cancellation of Appointments

There are three options for advisors to schedule an appointment with a student.

## Appointment Components

- **Type** is what determines whether the appointment you are creating is an Advising, Tutoring, or General appointment. While both Advisor and Tutor appointments are fairly self-explanatory, a General appointment may not be. A General appointment can be considered an obligatory event for the student or advisor. Events that can qualify are things like meetings, trainings, etc.
- **Reasons** is where you will select the purpose of the appointment. For example, Career Counseling and Schedule Changes can be valid reasons for advising appointments. For Advising and Tutoring appointments, reasons are configured by your GradesFirst Administrators. For general events, the reasons field is open.
- **Comments** is a selection where extra commentary can be entered about the appointment. **Both the student(s) and the advisor see these comments when they look at their calendar and receive their notification email.**
- **Select a Date** actually means select a week in which you would like to schedule the appointment. This lets you see the entire week, and not just a single day, to determine which the best day to schedule the appointment is.
- **Location** is where you will meet your students. Select the correct location from the drop down list.
- **Reminders** are sent the day of the appointment. The email reminder is sent the morning of the appointment and the text message is sent 1 hour before the appointment, as long as the student has a valid cell phone number in the system.
- **Add an Attendee** lets the advisor add extra users without having to exit the schedule appointment page. Simply type the user's name, select them, and they will be added to the appointment.
- **People Attending** are the users who will be scheduled for this appointment, the user scheduling the appointment is able to *Remove* or *Add an Attendee* prior to saving the appointment.
- **Select an Advisor** is the list of advisors who have availability at the selected Location. If you are creating an appointment for yourself, simply check your name. However, showing all advisors gives users the ability to create appointments for any advisor at that location (this option can be turned off to where advisors are only able to create appointments for themselves. See your GradesFirst Administrator for more information.)
- **Length** refers to the length of the appointment. While it will default to whatever the advisor had setup in the availability, it can be overridden here.

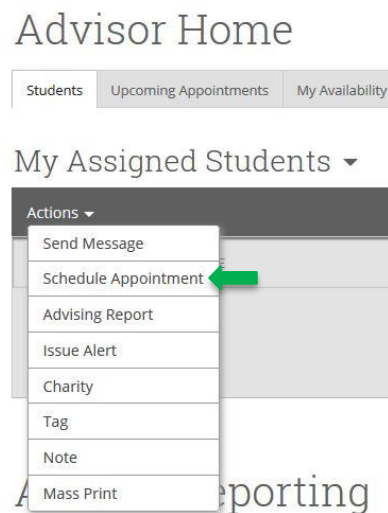
The *Scheduling Grid* is where you will actually select what time this appointment will take place. You will notice that a checkbox will appear for any times that is available for scheduling. If something is already scheduled or "Conflicts" with any time, you will see that notated on the grid. For example, Appointments, Free Busy, Conflicts (such as a student's class), or in some cases, Drop-in's for walk-in-appointment times. A blank means the selected advisor does not have availability

for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.

- **Availabilities** is where you can override everything and schedule the appointment at any time at any day. Select the option 'ignore Availabilities, unlock the calendar' and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.
- **Repeat This Appointment?** is where you can make this appointment recurring.
- To finish, click the **Save Appointment** button. When the appointment is saved, the system will send appointment notification emails to each of the attendees with the details of the appointment. It will also update each attendee's calendar.

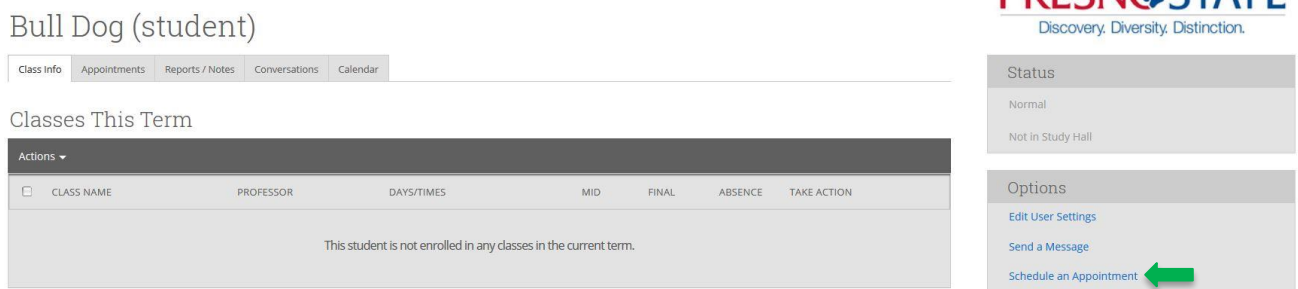
### Option 1: Scheduling Appointment from the Advisor Home Page

From the Advisor Home screen, you can select the student(s) and click **Schedule Appointment** from the drop down options.



### Option 2: Scheduling Appointment from the Student Profile Page

From the student screen, you can click an Appointment.



The system will then display the **Schedule an Appointment** page.



Schedule an Appointment

Type: Advising Appointment

Reason(s): Advising Appointment, Career Counseling for the 201g Group sessions

Comments:

Location: Choose

Select a Date: April 2014

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			

Reminders: Send an email reminder? Your Gradfirst administrator has enabled automatic text reminders.

People Attending (4): Adams, Julian (Student), Alhunis, Anne (Student), Alarape, Rahman (Student), Alston, Cameron (Student)

Add an Attendee:

Select An Advisor:

ADVISOR	AVAILABLE TIMES
Backus, Jesse	Mon-Fri 8:00am-5:00pm
Benton, Rolie	Drop-in Availability: Tue-Fri 8:00am-5:30pm (Winter 2013) Tue-Wed 8:00am-5:00pm (Winter 2013)
McLaughlin, D	Mon-Fri 8:00am-5:00pm (March 18, 2014 - May 30, 2014) Mon-Fri 8:00am-5:00pm (Winter 2013) Drop-in Availability: Mon-Fri 8:00am-5:00pm (Winter 2013) Tue-Fri 8:00am-4:30pm Tue 7:30am-1:00pm
Rosanfield, Mr. Charlie	

What Time? Length: 30 min

Availabilities: Show availabilities for this course/season

TIME SLOT	0806 (SUN)	0807 (MON)	0808 (TUE)	0809 (WED)	0810 (THU)	0811 (FRI)	0812 (SAT)
7:30a-8:00a							
8:00a-8:30a	FREE BUSY	DROP-IN FREE BUSY	DROP-IN FREE BUSY	DROP-IN FREE BUSY	DROP-IN	DROP-IN FREE BUSY	FREE BUSY
8:30a-9:00a		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	

### Option 3: Scheduling Appointment using Appointment Center

Step 1: Once logged in, click on **Additional Modes** at the bottom right hand of the screen and select **Appointment Center**



Step 2: Select the appropriate location

Follow the steps provided to set up Advising Center at this location.

Choose the Location for this Advising Center



Step 3: Once you have selected the location, you will be presented with the advising center

- Here you can search for a student and schedule their appointment or check them in for their appointment. You can also allow them to see the first counselor available.

Appointment Advisor Waiting Lists

Bull Dog

Bull Dog  
tguiffida@csufresno.edu  
Schedule General Event

Major: Classification:

**Search for a student by name, ID number, or Fresno State email.**

**Sort by a particular student services e.g. "Super Senior Hold".**

Calendar Options?

Available Times Only

Student Service: All Services

Time Increment: 45 min

One Click Create (On)

Move Appz (Off)

Find First Available?

Tuesday - 12/20/16

7:00a to 5:00p

Reload

First Available  queue

Current wait: none

**Other Advisors**  Select All

Robin Harper  queue

Current wait: none

Liliana Ocegueda  queue

Current wait: none

**Availability For Dec 20 2016**

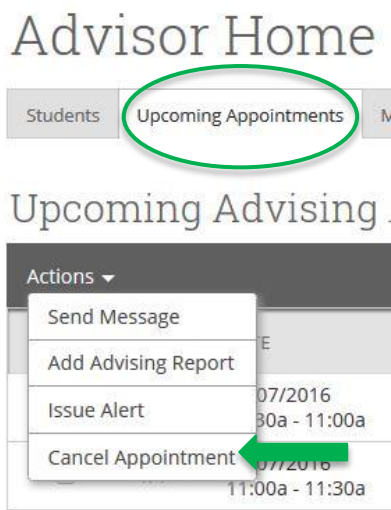
TIME	ROBIN HARPER	CATHERINE KLICHAR	LILIANA OCEGUERA
7:00a			
7:45a			
8:30a			
9:15a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:00a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:45a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:30a			
12:15p			
1:00p	DROP-IN	DROP-IN	DROP-IN
1:45p	DROP-IN	DROP-IN	DROP-IN
2:30p	DROP-IN	DROP-IN	DROP-IN
3:15p	DROP-IN	DROP-IN	DROP-IN
4:00p		DROP-IN	
4:45p			

**Green indicates an appointment slot is available which works for both the student and advisor.**

## Cancel Appointments

Need to cancel an appointment? From the advisor homepage, you can click on the Upcoming Appointments Tab.

- Check the appointment and click the Cancel Appointment button and choose the appropriate items in the dropdown menus. **Comments are optional and are seen both by the student(s) and the advisor when they receive their appointment cancellation email.**
- Clicking the Cancel Appointment button will instantly send out cancellation emails to all attendees alerting them the appointment has been cancelled.



The image shows a modal window titled 'CANCEL UPCOMING APPOINTMENT'. It contains the following fields:

- Cancel Appointment For:** A dropdown menu with the text 'Select Who to Cancel'.
- Reason:** A dropdown menu with the text 'Select A Reason'.
- Comments:** A large text area for entering comments.

At the bottom of the modal, there are two buttons: 'Close' and 'Cancel Appointment'.

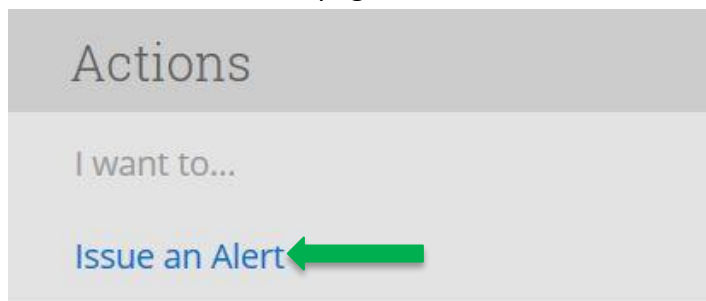
## Section 4: SupportNet and GradesFirst

### Referring Students to Support Services

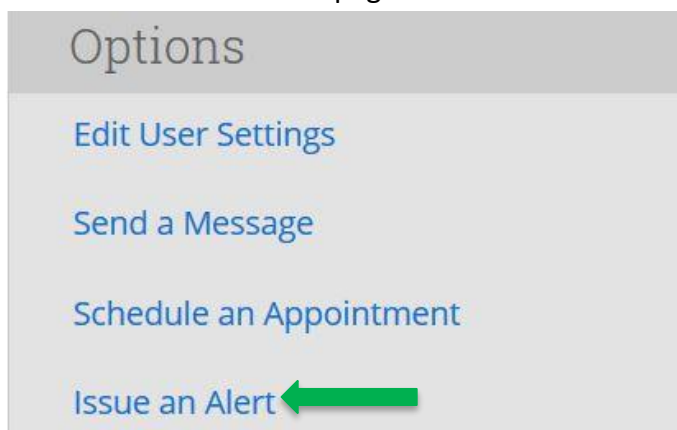
Refer a student at any time... At any point, an instructor or advisor can refer students to SupportNet through GradesFirst.

\*\*\*This is to refer a single student at a time.

From the Advisor Home page



From the Student Profile page



The referral generates a “case” in GradesFirst that is then received by the SupportNet office. If the student belongs to a Student Success Program on campus (i.e. CAMP, SSS, EOP, International, etc.), the cases will be assigned to that advisor for follow up. If the student is not part of a Student Success Program, SupportNet will follow up with the student.

ISSUE AN ALERT
✕

Student

Please select the reason you believe this student needs assistance

Is this alert associated with a specific class?

Additional Comments  
Please enter a comment.

- Enter student name or ID number
- Select the appropriate reason for the referral
- Enter course, if applicable
- Additional comments are helpful but not required
- Select **Submit**

### Case Management

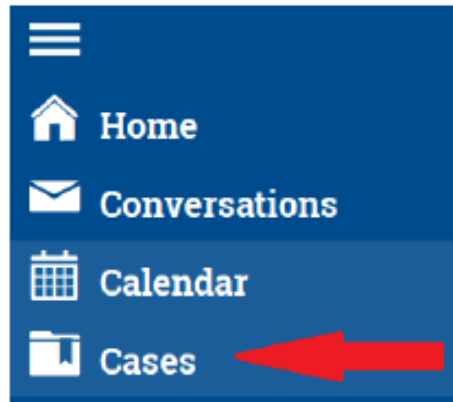
If the case is assigned to you, you will receive an auto-generated email notifying you of the referral. A link will be provided within that email to view the case details.

The advisor can read the comments provided and follow up with the student accordingly.

To View and Manage Cases:

From the Side Navigation, click **Cases**. You can view current, unassigned, and closed cases.

To manage a case – click the **Manage Case** button on the appropriate student case.



## Cases

Current Unassigned Closed

OPRN CASES Show Advanced Search

All  My Cases Only  My Students Only

<input type="checkbox"/>	STUDENT	REASONS	DATE OPENED	OPENED BY	ASSIGNED TO	CASE OWNER	Management
<input type="checkbox"/>	Eduardo Rodriguez	Other (See Comments)	09/02/2014	Margaret Webber			<a href="#">Manage Case</a>
<input type="checkbox"/>	Adeyinka Michael Adenigbun	Academic Difficulty	09/11/2014	Jim Keller			<a href="#">Manage Case</a>
<input type="checkbox"/>	Shambell Thompson	Academic Difficulty	09/11/2014	Jim Keller			<a href="#">Manage Case</a>
<input type="checkbox"/>	Christopher Yang	Academic Difficulty	09/03/2014	Dennis Driggers			<a href="#">Manage Case</a>

# Section 5: Search and Advanced Search

## Student Search

Step 1: Once logged into GradesFirst, you will be viewing your advisor home screen. The bar at the top allows you to search for students.



Step 2: Verify that the term is correct and enter the student's name, email, or student ID# in the search field.

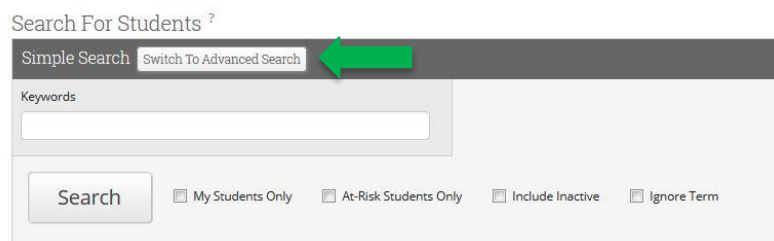
Step 3: A drop down menu will appear and you can click on the student's name.

## Advanced Search

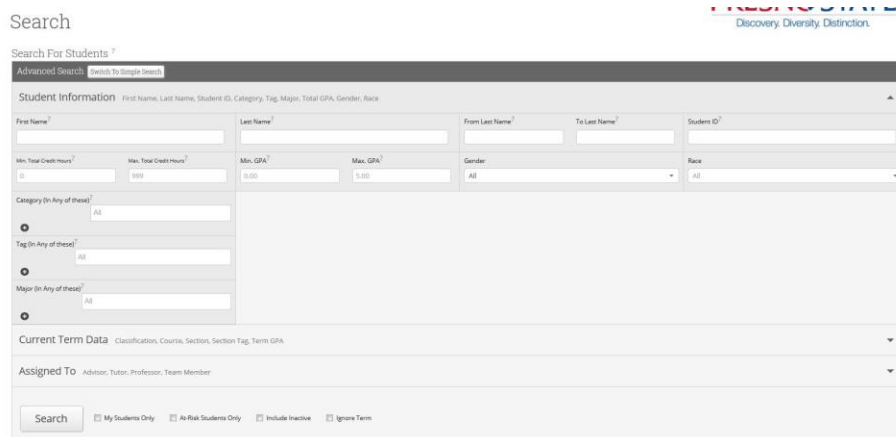
Step 1: Once logged into GradesFirst, click on the magnifying glass on the left side and select Advanced Search.

Step 2: Put in your search features.

### Search



**Note:** GradesFirst pulls information from PeopleSoft such as: holds, student groups, majors, etc. If your student groups and/or hold is missing please contact [gradesfirst@csufresno.edu](mailto:gradesfirst@csufresno.edu).



## Actions from Advanced Search

You have multiple options from Advanced Search once you pull your data: export results, issue alert, send a message, create an appointment campaign, create an advising report, and add note.

Search    Modify Search

Actions ▾

- Send Message
- Advising Report
- Appointment Campaign
- Schedule Tutoring Appointment
- Schedule Advising Appointment
- Schedule General Appointment
- Tag
- Note
- Mass Print
- Issue Alert
- Charity
- Watch
- Export Results

**Note:** If you want to select all students, click on *Select all #### items*. Or you will just select the first 100 students.

Actions ▾

100 items on this page are selected. [Select all 6527 items.](#)

ALL    STUDENT NAME    CATEGORY    CLASSIFICATION    CELL NUMBER

Search For  ?

Simple Search    Switch To Advanced Search

Keywords

Search     My Students Only     At-Risk Students Only

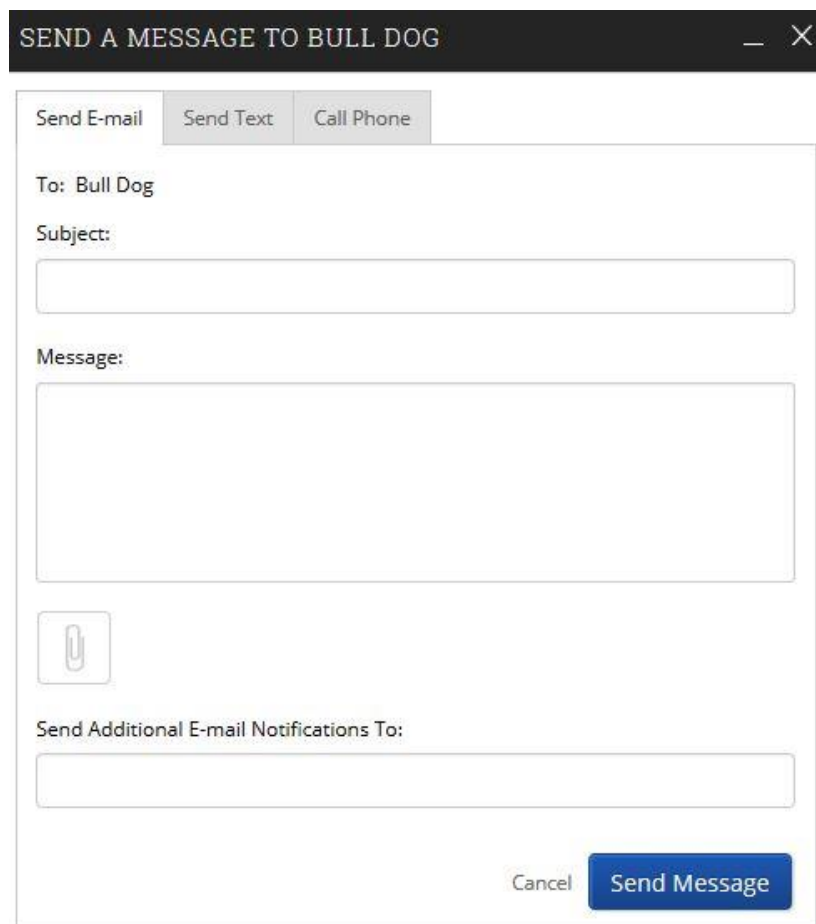
**Keep in mind:** Under *Keywords*, you can search up to 500 students by just using their ID number. No commas necessary.



## Section 6: Sending a Message

In GradesFirst, you can send messages to students from many different screens, including the *Advanced Search* and the *My Assigned Students* list on the *Advising Home* page.

To send an email message, check the box next to the student's name and click **Send Message**. This will bring up the *Send a Message* dialog. **Note:** Text message(s) are currently disabled.



SEND A MESSAGE TO BULL DOG

Send E-mail Send Text Call Phone

To: Bull Dog

Subject:

Message:

Send Additional E-mail Notifications To:

Cancel Send Message

The students you selected to receive the message will be listed at the top. It is worth mentioning that each student will receive their own separate email. We do not “CC” student emails. In other words, when Bull Dog looks at this email, he will not be able to tell that Victor E. also received it. This is especially important when advisors need to send out a sensitive message but don't want students to see who else received it. Lastly, you can also fill in the *Send an Additional E-mail Notification To:* field to also send an email to another email address.

**Note:** These emails are stored in GradesFirst and can be seen by all advisors, please do not send confidential information.

Users can attach files to an email. To attach a file, click the **Browse** button. Then navigate to and select the file.

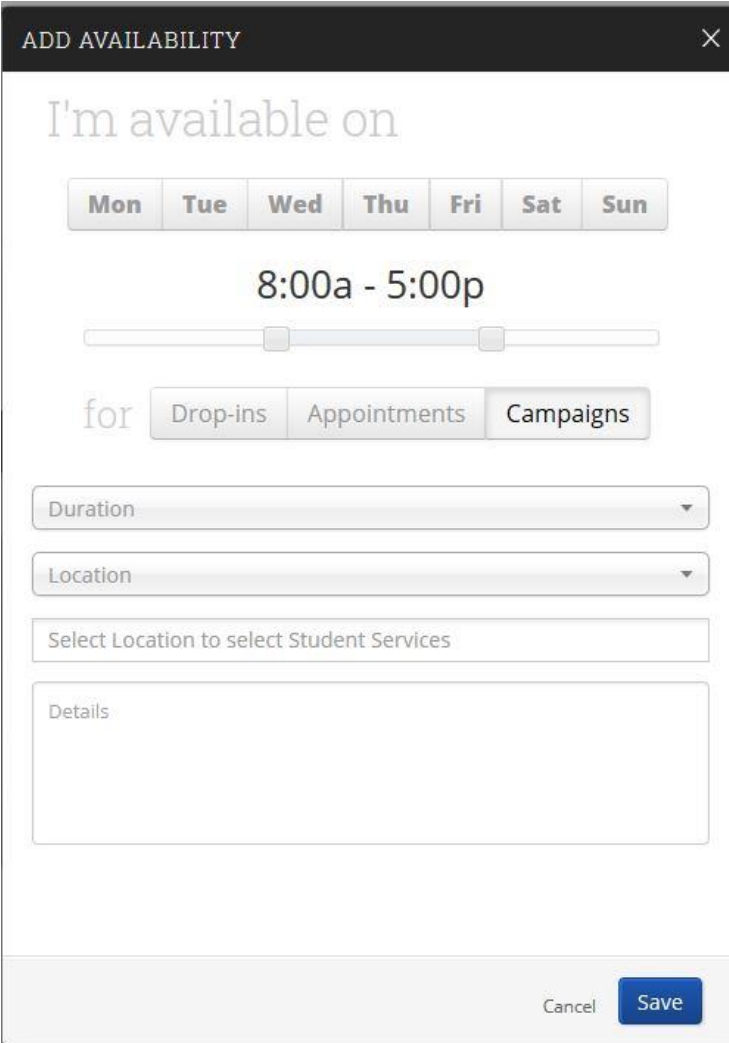
## Section 7: Appointment Campaigns

Appointment Campaigns enable 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. This feature is commonly used when an advisor must meet with all of their students at least once per term. To begin, click on **Campaigns** tab then under Actions, click on the **Appointment Campaigns** link and follow the setup steps.

To begin, from the **Advisor Home** Screen, click on **Appointment Campaigns**.  
Under **Actions** > Select **Appointment Campaign**

### Step 1: Set up your availability

Update or create availability to accept campaign appointments. Advisors will need to have availability defined before they can be added to an appointment campaign.



The screenshot shows a modal window titled "ADD AVAILABILITY" with a close button (X) in the top right corner. The main heading is "I'm available on". Below this, there are seven buttons for the days of the week: Mon, Tue, Wed, Thu, Fri, Sat, and Sun. Underneath the days, the time range "8:00a - 5:00p" is displayed, with a horizontal slider below it for adjusting the time. Below the time range, there are three buttons for the type of appointment: "Drop-ins", "Appointments", and "Campaigns". Further down, there are two dropdown menus: "Duration" and "Location". Below the "Location" dropdown is a text input field with the placeholder text "Select Location to select Student Services". At the bottom of the form is a "Details" text area. At the very bottom of the modal, there are two buttons: "Cancel" and "Save".

## Step 2: Define the Campaign

### New Invitation Campaign

#### Define Campaign

The screenshot shows a form titled "Define Campaign" with the following fields:

- Campaign Name:
- Campaign Type:
- Slots Per Time:
- Course or Reason:
- Begin Date:
- End Date:
- Appointment Length:
- Appointment Limit:
- Location:

Cancel

Save and Exit

Continue

- **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.
- **Campaign Type:** Choose to create a tutoring or advising campaign. Depending on your permissions, you may only have the option to create an advising campaign.
- **Slots Per Time:** This will determine how many students can sign up for a time slot at one time. Changing this to a number greater than one will make this group appointment.
- **Course or Reason:** Choose the course or reason that the appointment will fall under.
- **Choose the Start and the End Date:** This will be the date range for which you want the students to make their appointments.
- **Length of the Appointment:** This is where you define exactly how long the appointment will be. Durations include 10, 15, 30, 45, and 60 minutes intervals.
- **Appointments Limits:** This will determine how many appointments you wish for the students to schedule.
- **Location:** Select the location of where the appointment(s) will be held.

**Common issues:** If course and reason do not match with your location, check the advisor(s) availability is set to accept campaigns.

## Step 3: Add Students to Campaign

#### Add Students To Campaign

The screenshot shows two buttons:

- Invite All My Assigned Students
- Advanced Search

Advanced Search: Depending on the population of students that you are issuing the appointment campaign to will determine how you search for these students. Use the best search method for your population and then click **Search**. You can then select student(s) and then click the Continue button.

**Note:** You will be able to review your selection prior to moving onto the third step.

#### Step 4: Add Advisors to Campaign

You will need to select yourself as the advisor for the campaign. You may select additional advisors if they will be meeting with this population of students for the campaign. **Advisors will need to have availability defined before they can be added to an appointment campaign.**

Add Advisors To Campaign  Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Monica Quintero	Mon-Fri 8:00am-11:00am (October 31, 2016 - November 11, 2016) Mon-Fri 1:30pm-4:00pm (October 31, 2016 - November 11, 2016)
<input type="checkbox"/>	Tosha Giuffrida	Tue, Thu 8:00am-5:00pm (October 31, 2016 - November 11, 2016)

Save and Exit

#### Step 5: Compose your Message

Compose the message that you would like to send to students in the invitation to schedule an appointment through the campaign.

## Fall 2016 Super Seniors

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### Compose Your Message

{\$student\_first\_name}, Schedule an Advising Appointment

**B** *I* | | | | | | | Normal ▾

Please schedule your advising appointment.

Hello {\$student\_first\_name}:

Your advisor requests that you schedule an appointment. To do so, please click the foll

{\$schedule\_link}

Thank you!

- Email Subject: The topic will be the subject of the email going to the student.
- Instructions or Notes: This will be your message to the student.
- Anything in {\$} is automatically filled by GradesFirst.

**Note:** This screen will also give you a preview of what the invite will look like.

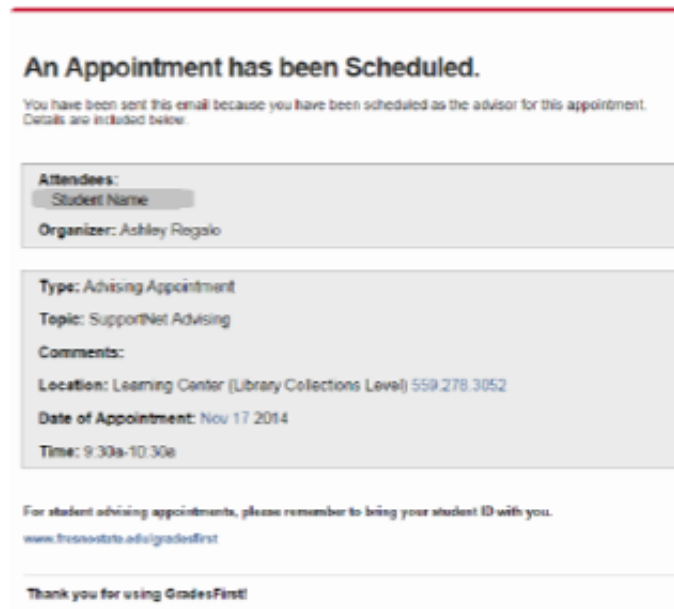
#### Step 6: Confirm and Send

Review the information and parameters you have entered for the campaign. Click **Send** when you are ready to email the invites to the selected students.

As students schedule an appointment with you from the campaign email, you will receive an auto-generated email notifying you of the appointment. The appointment will automatically be added to your GradesFirst Calendar and adjust your availability.

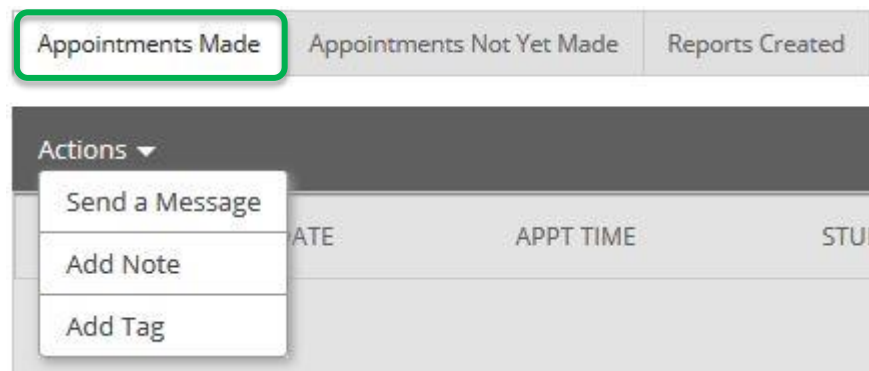
## Managing Your Appointment Campaigns

GradesFirst provides you with several tools to help manage your Appointment Campaign after you create and send it.



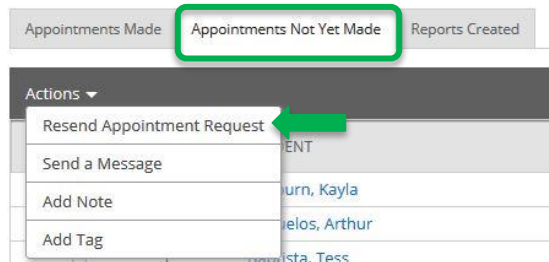
### Appointments Made

This tab will let you see which students have made appointments from the campaign. Not only can you view those students, but also you can **Send a Message** or **Add Note** (Note: Add Tag is listed but is an administrative function processed through PeopleSoft).



### Appointments Not Yet Made

This tab will display those students who have yet made their appointment from the campaign. *Resend Appointment Request* option will let you resend the appointment campaign email to selected students.



## Reports Created

This tab will display all advisor reports that were created for the appointments made during the campaign.



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

Actions ▼

## Appointment Campaign Options



Options

- Edit Campaign Details
- Delete This Campaign

- **Edit Campaign Details:** With this option, you can edit anything about the appointment campaign. When those changes have been saved, they will automatically apply to all students who are still required to make an appointment. Students who have already created their appointment(s) will not be affected by the changes.
- **Delete This Campaign:** You can always use this option to delete an existing campaign. However, deleting this campaign will NOT remove any student appointments that have already been scheduled.

# Section 8: Probation Disqualification Students

Instructions for special programs and advising centers to use when identifying and outreaching to students on probation or academically disqualified-readmitted.

## Identify Students

To identify students required meet in your area:

1. Perform an advanced search
2. Select the appropriate tag
3. Check "Include Inactive" AND "Ignore Term"
4. Press Search

The screenshot shows the 'Advanced Search' interface for Fresno State. The search criteria are set to 'Students'. The 'Tag' dropdown is set to 'All', and the 'Include Inactive' and 'Ignore Term' checkboxes are checked. The search button is visible at the bottom left.

## Tags

DQP-EOP	EOP	DQP-CSM	COLLEGE OF SCIENCE & MATH
DQP-CAMP	CAMP	DQP-CSB	CRAIG SCHOOL OF BUSINESS
DQP-ATHLETE	STUDENT ATHLETE SERVICES	DQP-CSS	COLLEGE OF SOCIAL SCIENCE
DQP-SSSP	SSSP	DQP-JAG	JORDAN COLLEGE OF AG SCI & TECH
DQP-UNDECLARED	UNIVERSITY ADVISNG CENTER	DQP-HHS	HEALTH & HUMAN SERVICES
DQP-SUPPORTNET	SUPPORTNET	DQP-LCE	LYLES COLLEGE OF ENGINEERING
DQP-KRE	KREMEN SCHOOL OF ED	DQP-CAH	COLLEGE ARTS & HUMANITIES

## Active vs. Inactive Students

**ACTIVE:** Students enrolled in spring, summer and/or fall 2016

**INACTIVE:** Students not currently enrolled (may have used spring 2016 as a stop-out semester)

**To identify students who are only enrolled in fall:**

1. Change the term on the top right to Fall 2016
2. Perform an advanced search
3. Select the appropriate tag
4. Press Search

**Special Note:** When sending an Advising Campaign, students who are INACTIVE will not be able to schedule their own appointment (through the campaign). Include a note to have students who plan on enrolling for following semester to email or call your office to make an appointment.

# Section 9: Report Detail

## Progress Reports

### Student Progress Reports

This is a summary report of submitted Progress Reports. This report is made to be simple, and easily printable. Much of the detailed information can be found on the "Progress Report Detail." The detailed report is intended to include much more information for in-depth analysis.

#### Detailed Student Progress Reports

The Progress Reports Detail screen shows more columns than the simpler summary. This report will take longer to render on the screen because of the inclusion of more data.

### Student Flagged At-Risk

This report displays the same type of information as the other progress reports, except this report will only display those students who were marked at-risk by their professors. This is a summary report.

#### Detailed Students Flagged At-Risk

This report displays the same type of information as the other progress reports, except this report will only display those students who were marked at-risk by their professors. This is a detailed report that has much more information than the summary report.

### At-Risk Progress Reports and Tutor Appointment

The following report shows a list of students who have been reported At-Risk in a course and any tutor appointments for that course. This report shows if students who are marked At-Risk are being processed effectively with tutor appointments. Also, with Dropped Dates, Tutor Appointment Dates, and Grades, the report shows effectiveness of those actions.

### At-Risk Progress Reports and Advisor Appointment

The following report shows a list of students who have been reported At-Risk in a course and any advisor appointments. This report shows if students who are marked At-Risk are being processed effectively with advisor appointments. Also, with Dropped Dates, Advisor Appointment Dates, and Grades, the report shows effectiveness of those actions.

### Progress Report Requests

This report will show a list of progress report requests that have been made within a given date range.

## Alerts & Cases Reports

### Alerts

This report will show a list of alerts within a specific date range. You can run this report by a specific alert e: gradesfirst@csufresno.edu



reason and/or case issuer.

## Cases

This report will show a list of cases created for alerts that were entered for students. You can run this report by a specific alert reasons and/or case opener.

## Absence & Enrollment Reports

### Absences

This report display any and all absences recorded within a specific date range. Summary report.

### Absence Details

This report display any and all absences recorded within a specific date range. Detailed report.

### All Recorded Attendances

This report displays all attendances taken between specific date ranges. It will show whether attendance has been taken and if a student was marked absent, present or tardy.

### Sections with/without Attendance

Below is a report that will show all sections with and without recorded attendance.

### Dropped Classes

This report shows any and all student who have dropped a class.

### Non-Campaign Enrollment Census Report

This report pulls from attendance information and will display the last day of attendance, and/or other enrollment information as provide by instructors.

## Assignment & Miscellaneous Reports

### Users Who Have Logged Into GradesFirst

Displays a list of all users who have logged into GradesFirst

### Users Who Have Not Logged Into GradesFirst

Displays a list of all users who have not logged into GradesFirst

### Student Assignments Report

Generates a list of all student assignments that have been created for students.  
e: gradesfirst@csufresno.edu

## **Student Assignments Past Due Report**

Generates a list of all student assignments that are considered past due for students.

## **Professors Active For Term**

Displays a list of all professors that are active for the current term.

## **Study Hall Reports**

### **Students Currently Checked Into**

Displays a list of all students who are currently checked into study hall.

### **Students Recently Checked Out**

Displays a list of all students who were recently checked out of study hall as of today. This report refreshes each day.

## **Charity Time**

Displays charity times that have been assigned to students within a specific date range.

## **Completed Required Study Hours**

Displays a list of students who have completed their required weekly study hall hours.

## **Did Not Complete Required Study Hours**

Displays a list of students who have not completed their required weekly study hall hours.

## **Weekly, Monthly, Semester Time**

Summarizes student's study hall time within a specific date range.

## **History Log**

Displays a detailed history log of a study hall time logged by students within a specific date range.

## **Student Information Reports**

### **Students Active for Term**

Lists all students who are considered active for the current term.

### **Students with/without Advisors**

The following is a list of students with their advisors. Each student is listed for each advisor. If a student has multiple advisors, he will be listed twice, which allows for easier processing in Excel.

### **Students with Courses**

This report gives a summary for each student's courses this term. Due to the size of the report, if the report does not load try one of the following 1) filter to smaller groups (i.e. category, tag, or classifications) or 2) export to Excel without showing on screen by clicking "Print Report" to the right without "Searching." Using this report in Excel, you can weight absences, at-risk evaluations, tutor requests, and tutor appointments.

### **Students by Category and Course**

This report displays each student's schedule along with detailed information on a class by class basis.

### **Notes**

This report will display any and all notes that have been created for a student within a specific date range.

### **Student Services Reports**

#### **Student Services**

Displays all visits recorded by the student kiosk.

#### **Student Services by Section**

Displays all visits recorded by any student kiosk on GradesFirst.

### **Tutor Reports**

#### **Tutor Appointments Report**

The Tutor Appointments Report will list all past and present tutor appointments within a specific date range. This report is designed to give users the basic information surrounding each appointment.

#### **Tutor Appointment Details Report**

Quite similar to the Tutor Appointments Report outlined on the previous page, this report is also used to list all past and present tutor appointments with one noticeable difference. This report has a lot more information, or details, displayed for the users benefit.

#### **Tutor Summaries**

Shows tutoring evaluations for appointments. Only appointments with evaluations will show in this report. To find appointments without evaluations, please use the 'Tutor Appointments' report.

## Tutor Detail Summaries

This report also shows tutoring evaluations for appointments, but with more detailed columns than the report listed above. This report will only show appointments with evaluations. To find appointments without evaluations, please use the 'Tutor Appointments' report.

## Daily Tutor Appointments Report

Need a list of today's tutor appointments? Well, this is the report for you. We default the beginning and end dates to today. This report will default to today's date so all you need to really do is click the Search button.

## Tutor No-Show Report

The Tutor No-Show Report displays a list of all students who were marked as a "No-Show" for their tutor appointments. Need to find those students who continuously miss their appointments? This is the report for you.

## Tutor Cancellations

This report will display tutor appointment cancellations and their reasons.

## Tutor Statistics (Stats) Report

The tutor Stats Report gives the tutor coordinator the ability to view exactly how their tutors are being utilized in regards to tutor appointments. This report was designed to help users manage/maintain specific tutor utilization levels. One can easily use this report to ascertain which tutors are being utilized more than others.

## Tutor Requests Report

Need to generate a list of tutor request and whether they have been filled? This is your report. This report will help you keep track of and manage requests for tutor appointments as well as quickly determine if they have been 'Matched' with a tutor.

## Tutor Requests by Course

Generate a report of the number of tutor requests a particular course has received. This is an excellent way to determine what Courses you need your tutors to be able to teach and provide valuable information about what Courses students' tend to struggle with.

## Tutors By Course

This report lists tutors by the course and availability. Please note, when using 'Print Report' for this page, the export will contain one line per 'Availability' set by the tutor. Therefore, some tutors and courses will be listed multiple times. This allows for better data manipulation within Excel.

## Tutors Availabilities

This report will show tutor availabilities based on tutoring location and/or tutoring reason.

## Tutor Payroll Reports

### Payroll Approval

The reports provided for Tutor Payroll Approval allow tutor management staff to review all timesheets (both submitted and not submitted yet) for their tutors, based on a selected pay period. You can select one or more timesheets and approve them. Once approved, the timesheet will be available to print as a one-page document, suitable to turn into the financial office for payment.

### Tutor Hours Summary Sheets

This report generates payroll summary sheets (or timesheets) for tutors that, for the selected pay period, have been approved by tutor administrators. These sheets are printable as one-page documents that can be turned in to the financial office for payroll processing.

### Detailed Tutor Hours Summary Sheets

This report generates payroll detailed sheets (or timesheets) for tutors that, for the selected pay period, have been approved by tutor administrators. These sheets are printable as one-page documents that can be turned in to the financial office for payroll processing.

## Advisor Reports

### Advisor Appointments Report

Report that displays specific advisor appointments within a specified date range. This is a summary report.

### Advisor Appointment Details Report

Report that displays specific advisor appointments within a specified date range. This is a detailed report.

### Advisor Summaries

Shows advising evaluations for appointments. Only appointments with evaluations will show in this report. To find appointments without evaluations, please use the 'Advising Appointments' report.

### Advisor Detail Summaries

This report also shows advising evaluations for appointments, but with more detailed columns than the report listed above. This report will only show appointments with evaluations. To find appointments without evaluations, please use the 'Advisor Appointments' report.

### Advisor Reason Totals

This is a statistics report that will pull numbers based on advising appointments by advising reasons used as the appointment topic.

## Daily Advisor Appointments Report

This is a report that displays all advisor appointments for a specific day or date range.

## Advisor No-Show Report

This report displays a list of those students who were marked as a no-show for their advisor appointments.

## Advisor Statistics (Stats) Report

The advisor Stats Report gives advisors the ability to view exactly how their tutors are being utilized in regards to tutor appointments. This report was designed to help users manage/maintain specific tutor utilization levels. One can easily use this report to ascertain which tutors are being utilized more than others.

## Advisor Conversations Stats

This report lists advisor conversations statistics within the specified date range. The report is limited to a 90-day date range.

## Advising Request Report

This report will show you student created requests for advising appointments. This report requires that a student be present in at least one term in the system.

## Advisor Availabilities

This report will show advisor availabilities based on advising location and/or advising reason.

## Summary Reports

### Advisor & Tutor Summaries

This report shows both advising and tutoring evaluations for appointments. Only appointments with evaluations will show. To find appointments without evaluations, please use the 'Tutor Appointments' or 'Advisor Appointments' reports.

### Advisor & Tutor Summaries Detail

This report also shows both advising and tutoring evaluations for appointments with more details than the report listed above. Only appointments with evaluations will show. To find appointments without evaluations, please use the 'Tutor Appointments' or 'Advisor Appointments' reports.

### Cancellation Summaries

This report will show a list of cancelled appointments for a specified date range. You can run this report by a specific cancellation reason. This report will pull in all types of cancelled appointments.

## Cancellation Summary Statistics

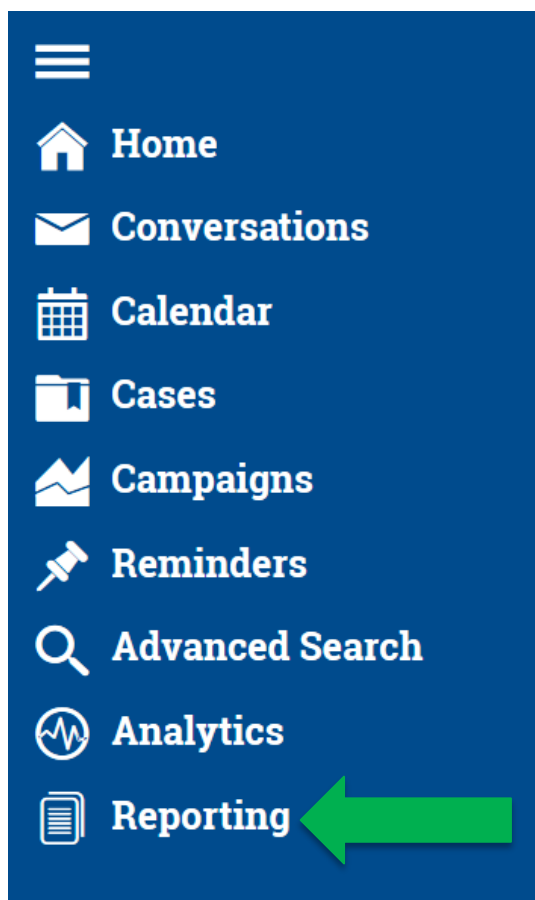
This report will show you statistics based off of cancelled appointments in the system and the reasons that were used for those appointments. This report will pull in all types of cancelled appointments.

# Section 10: How to Pull Reports

## Reporting

Log into your GradesFirst account

- Click the GradesFirst Academics link from the My Fresno State portal OR
- Click the GradesFirst link on Blackboard OR
- Go to [fresnostateacad.gradesfirst.com](https://fresnostateacad.gradesfirst.com) and use your Fresno State login/password

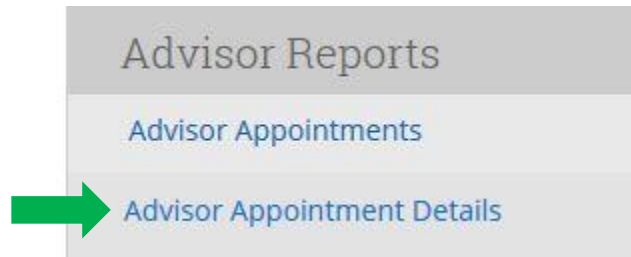




## Advisor Appointment Details Report

Step 1: Click on the reports icon.

Step 2: Under Advisor Reports click on Advisor Appointment Details.



Step 3: Adjust the date range, filter by your location and filter by Advising Location.

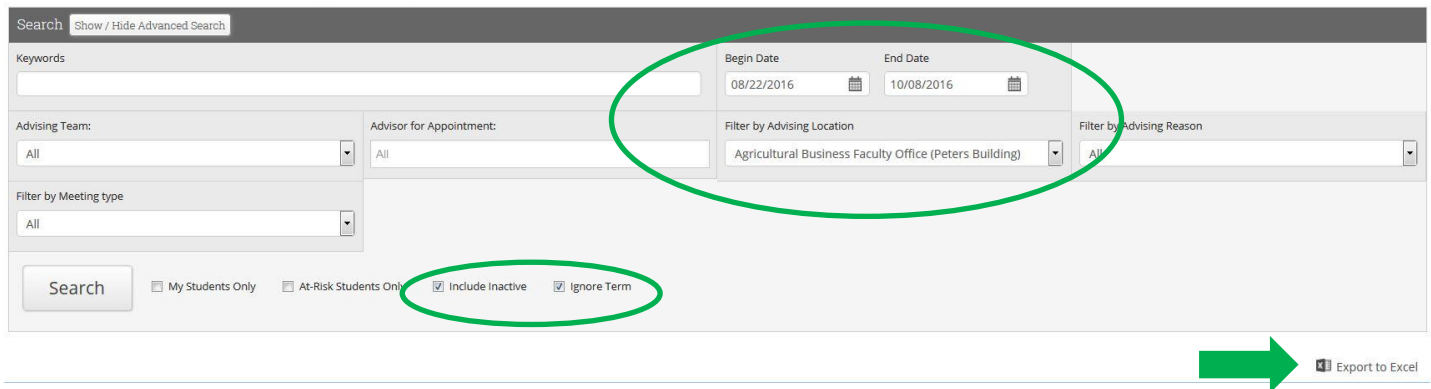
- Check Include Inactive box and Ignore Term

Step 4: Search for your results.

## Advisor Appointment Details Report



This report lists detailed student data for all of the advising appointments within the specified date range.



Search

Keywords

Advising Team:

Advisor for Appointment:

Begin Date:

End Date:

Filter by Advising Location:

Filter by Advising Reason:

Filter by Meeting type:

My Students Only  At-Risk Students Only  Include Inactive  Ignore Term

## Student Services Report

Step 1: Click on the reports icon.

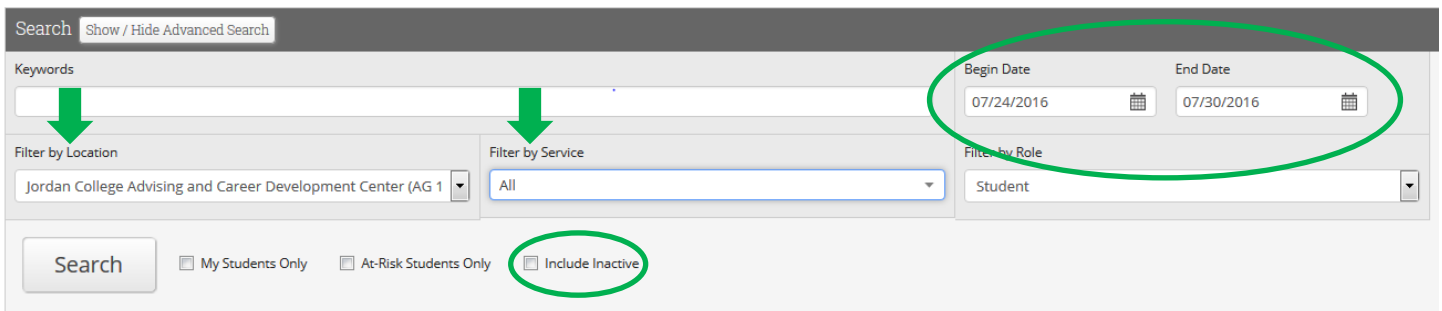
Step 2: Under Student Services Reports click on Student Services.



Step 3: Adjust the date range, filter by your location and filter by Service (service = workshop). **Note:** Check Include Inactive box

Step 4: Search for your results.

## Student Services

A screenshot of the "Student Services" search interface. At the top, there is a "Search" button and a "Show / Hide Advanced Search" link. Below this is a "Keywords" search box with a green arrow pointing down into it. To the right of the keywords box are "Begin Date" and "End Date" fields, both containing dates (07/24/2016 and 07/30/2016) and calendar icons, circled in green. Below the keywords box are three filter sections: "Filter by Location" with a dropdown menu showing "Jordan College Advising and Career Development Center (AG 1)", "Filter by Service" with a dropdown menu showing "All", and "Filter by Role" with a dropdown menu showing "Student". At the bottom left is a "Search" button. To its right are three checkboxes: "My Students Only", "At-Risk Students Only", and "Include Inactive", with the "Include Inactive" checkbox circled in green.

# Section 11: Recording a Visit

This option is best used for simply tracking a student’s attendance for a particular reason. This option does not require students to checkout, rather is simply tracks that the student was at this location for a particular reason. For instance, if the department wanted to track the number of visits for Computer Use, this would be a good option. It won’t track how long the student was there for Computer Use, rather just that they were there. **Note:** GradesFirst offers an option to track time. This option is for services that are used to track a student’s time (both check-in and check-out) and student would need to check in and out of the location.

## Recording a Visit

Step 1: Log into your GradesFirst account.

Step 2: On the bottom right side, click on Advising Kiosk.

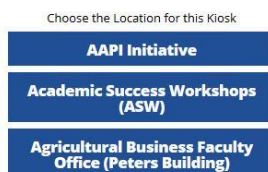


Step 3: A new window will appear, you will choose your location. Once you choose the location you will be logged out of your account.

Starting Kiosk mode will log you out of your account, but we can't close your windows for you. To prevent unauthorized viewing of your account, please close any windows that are still open.

### Kiosk Setup

Follow the steps provided to set up the kiosk mode at this location.



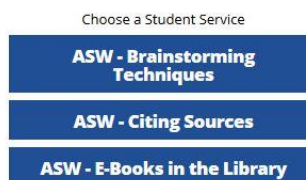
Step 4: You can then select *Single Purpose* or *Multiple Purpose*.

- Single Purpose allows students to select one reason for their appointment.
- Multiple Purpose Mode allows the student to select list reason for their appointment.

Step 5: Select the workshop you want to record.

### Advising Kiosk Setup

Follow the steps provided to set up the kiosk mode at this location.



Step 6: The student can then swipe their ID card or enter their ID number.

## Student Services Report

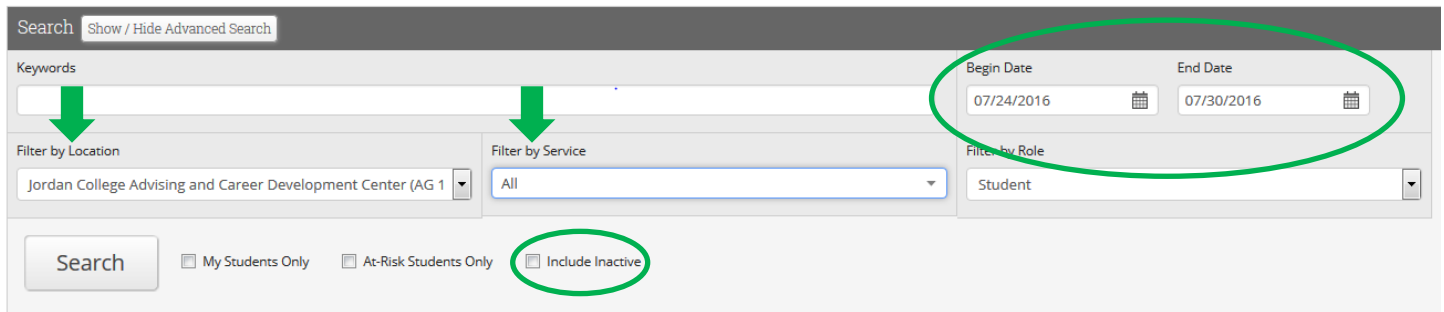
Step 1: Click on the reports icon.

Step 2: Under Student Services Reports click on Student Services.



Step 3: Adjust the date range, filter by your location and filter by Service (service = workshop). **Note:** Check Include Inactive box

## Student Services

A screenshot of a search interface for "Student Services". At the top, there is a "Search" button and a "Show / Hide Advanced Search" toggle. Below this are several filter sections: "Keywords" with a text input field and a green arrow pointing down; "Filter by Location" with a dropdown menu showing "Jordan College Advising and Career Development Center (AG 1)"; "Filter by Service" with a dropdown menu showing "All" and a green arrow pointing down; "Filter by Role" with a dropdown menu showing "Student"; "Begin Date" and "End Date" fields with calendar icons, both circled in green, showing dates "07/24/2016" and "07/30/2016" respectively; and a row of checkboxes: "My Students Only", "At-Risk Students Only", and "Include Inactive", with the "Include Inactive" checkbox circled in green. A "Search" button is located to the left of the checkboxes.

## Section 12: Front Desk and Coach Role

GradesFirst Appointment Center allows your student support staff to assist students who need to check in for an appointment, drop in to see an advisor, schedule a future appointment, or cancel an appointment. From Appointment Center, you can add students to waiting lists to meet with a specific advisor or the first available advisor. You can also schedule appointments with their assigned advisor or someone else. Advisors can monitor activity within the Appointment Center and receive notifications when students are checked in. The Coach Role is intended for use by a front desk employee(s) to schedule and manage appointments without using their own Fresno State credentials.

### Log into GradesFirst without SSO

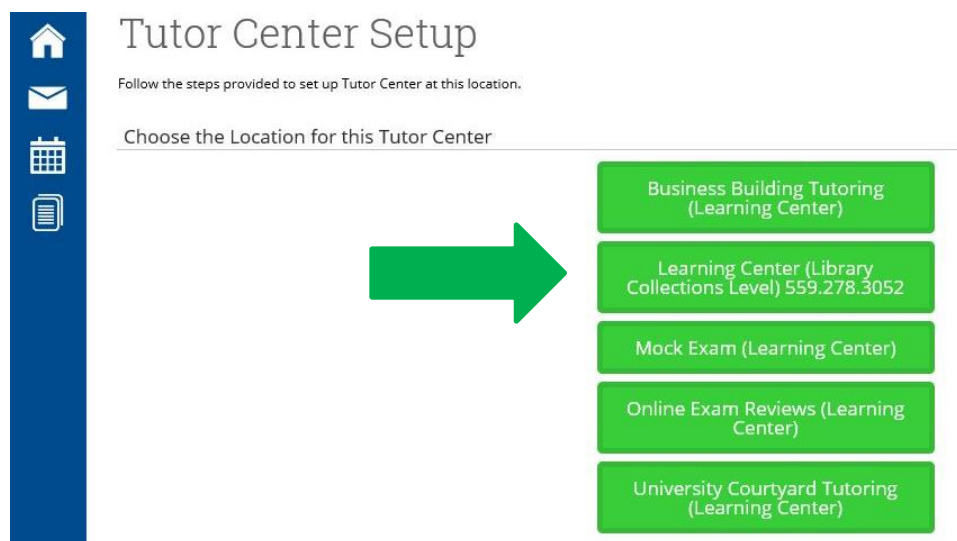
- Log into GradesFirst by visiting:  
[https://fresnostateacad.gradesfirst.com/session/new?prevent\\_redirect=true](https://fresnostateacad.gradesfirst.com/session/new?prevent_redirect=true)
- Enter your department's username and password

### Tutor Center Mode

Step 1: Once logged in, click on **Additional Modes** at the bottom right hand of the screen and select **Tutor Center**

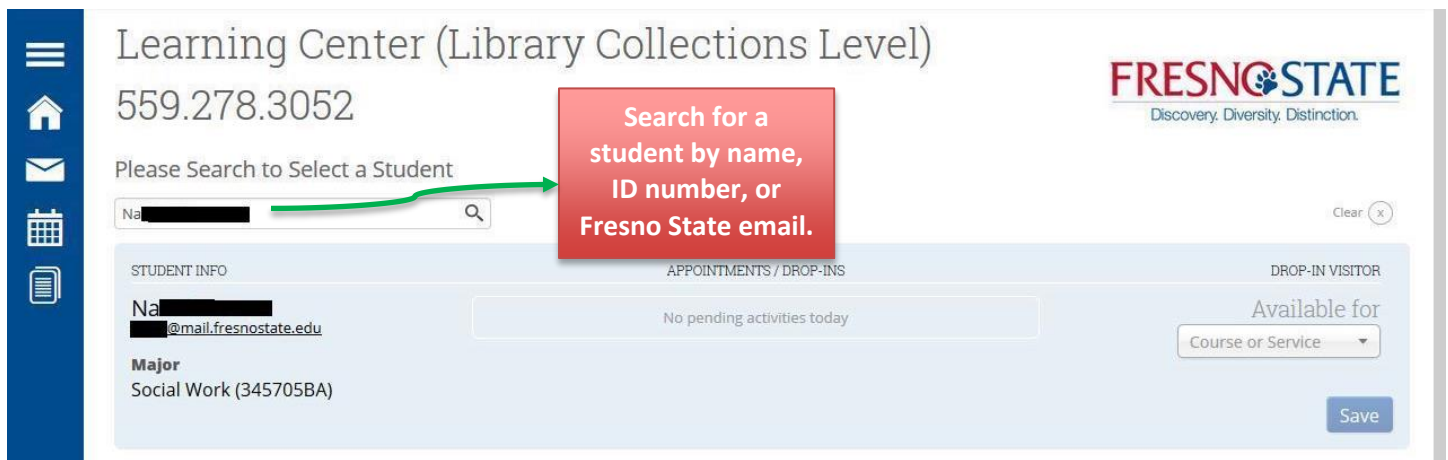


Step 2: In the new window, select the appropriate location



Step 3: Once you have selected the location, the Tutoring Center will appear for you to login students

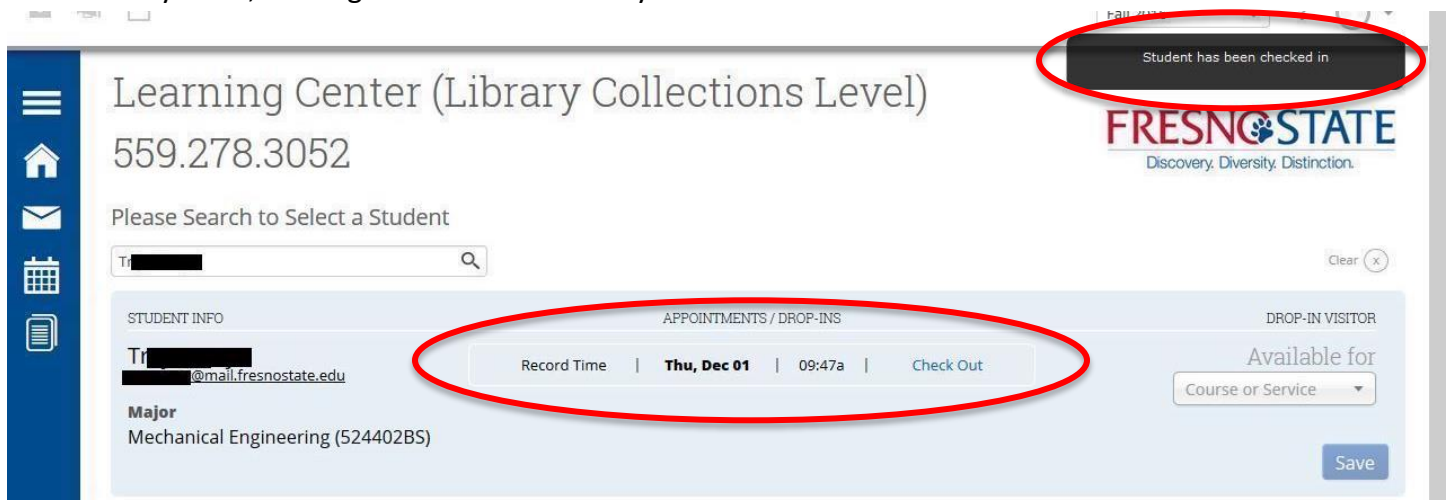
- a. Then, by selecting the name of the student that pops up after entering it, a light blue box will show under where you entered the student's ID number/email/name. This contains the student's information (i.e. name, school email, major, and current courses).



Step 4: You will then login the student by looking at the box under **Available for**. Current classes the student is taking should be listed there for you to scroll through and select which course he/she is going to get tutored in.



Step 5: Click **Save** and the screen should have the Record Time displayed under **Appointments/Drop-ins**. A momentarily black, rectangular box will also tell you that the student has been checked in.



## Advising Kiosk Mode

Step 1: Once logged in, click on **Additional Modes** at the bottom right hand of the screen and select **Advising Kiosk**

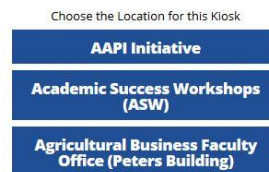


Step 2: The kiosk will open a new window. Select the appropriate location.

Starting Kiosk mode will log you out of your account, but we can't close your windows for you. To prevent unauthorized viewing of your account, please close any windows that are still open.

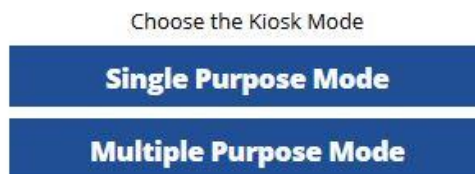
## Kiosk Setup

Follow the steps provided to set up the kiosk mode at this location.

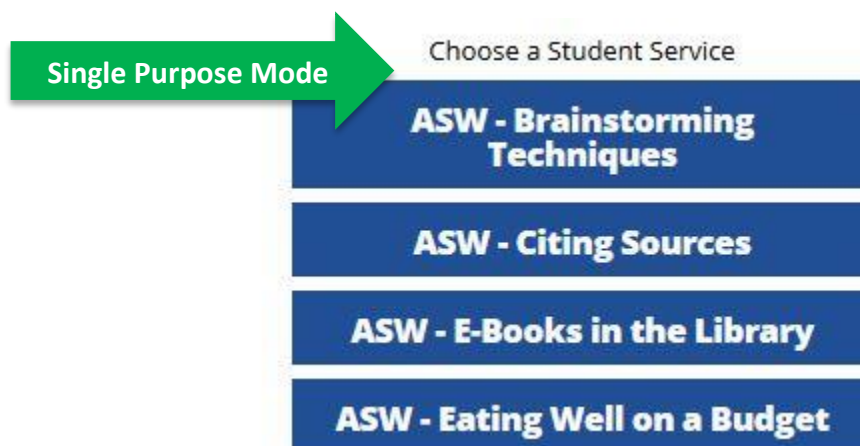


Step 3: You can then select **Single Purpose Mode** or **Multiple Purpose Mode** depending on the set up of your location.

- Single Purpose Mode:** allows students to select 1 reason for their appointment
- Multiple Purpose Mode:** allows the student to select multiple reasons for their appointment



Step 4: The student then selects the reason(s) that they are there to see an advisor.



What would you like to do today?



- ASW - Brainstorming Techniques**
- ASW - Citing Sources**
- ASW - E-Books in the Library**
- ASW - Eating Well on a Budget**

Step 5: The student can then swipe their ID card or enter their ID number

---

## Welcome to the Academic Success Workshops (ASW)



Please swipe your Student Card (or enter your ID):

Submit



## Appointment Center Mode

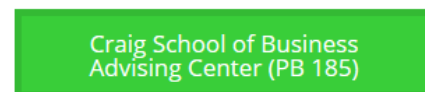
Step 1: Once logged in, click on **Additional Modes** at the bottom right hand of the screen and select **Appointment Center**



Step 2: Select the appropriate location

Follow the steps provided to set up Advising Center at this location.

Choose the Location for this Advising Center



Step 3: Once you have selected the location, you will be presented with the appointment center

- b. Here you can search for a student and schedule their appointment or check them in for their appointment. You can also allow them to see the first counselor available.

**Search for a student by name, ID number, or Fresno State email.**

**Sort by a particular student services e.g. "Super Senior Hold".**

**Green indicates an appointment slot is available which works for both the student and advisor.**

Appointment: Advisor Waiting Lists

Bull Dog

tguffride@csufresno.edu  
Schedule General Events

Major: Classification:

Find First Available?

Tuesday - 12/20/16

7:00a to 5:00p

Reload

First Available

Current wait: none

Other Advisors

Robin Harper

Current wait: none

Liliana Ocegueda

Current wait: none

Calendar Options?

Available Times Only

Student Services:

All Services:

Time Increment: 45 min

One Click Create (On)

Move Appts (Off)

Availability For Dec 20 2016

TIME	ROBIN HARPER	CATHERINE KUCHAR	LILIANA OCEGUERA
7:00a			
7:45a			
8:30a			
9:15a			
10:00a			
10:45a			
11:30a			
12:15p			
1:00p	DROP-IN	DROP-IN	DROP-IN
1:45p	DROP-IN	DROP-IN	DROP-IN
2:30p	DROP-IN	DROP-IN	DROP-IN
3:15p	DROP-IN	DROP-IN	DROP-IN
4:00p		DROP-IN	
4:45p			

Step 4: Once you click the green box to schedule the appointment, you can confirm the appointment. Choose the reason for the appointment and click on **Save Appointment**. An email will be generated to both the advisor and student.

**CREATE AN ADVISOR APPOINTMENT** ✕

**Student:** Bull Dog      **Advisor:** Liliana Ocegueda

**Where:** Craig School of Business Advising Center (PB 185)      **When:** Dec 20 2016 09:15 AM to 10:00 AM

**Reason(s) for Appointment**      **Comments**

CDC Career Advising  
CSB Academic Advising


Send E-mail Reminder  
 Send SMS Reminder

**Save Appointment**      Cancel

Step 5: When a student arrives for their appointment, you can swipe their ID card, key in their ID number, or email address and check them in for their appointment. This will notify the appropriate advisor that the student has arrived.

Appointment      Advisor Waiting Lists

Bull Dog ✕

 **Bull Dog**  
tosha.giuffrida@csufresno.edu  
[Schedule General Event](#)

Major:      Classification:

**The Actions menu allows you to cancel or move the appointment.**

Appointment      Actions ▾

With: Monica Quintero  
When: 10/28/2016 01:00 PM  
Type: Academic Coaching  
Time: about 1 hour early

**Check In** ←

# Section 13: Faculty Role (non-advising)

## Faculty Progress Report

1. The initial email will contain direct links for Progress Reports. You may also log onto GradesFirst to find the progress report.

## Progress Report Request

Dear Professor Moore,

Thanks for all you do. Please take a moment to identify students in your class who may be having difficulty or need tutoring. Just click the link below. It should only take a minute or two. Thanks for your help.

[Click to Begin Entering Progress Reports](#)

2. Only students requiring progress reports will be listed. You are able to save and submit completed reports.

Student Progress Reports

**Professor Moore:**  
 You have been asked to fill out progress reports for students in the following classes. Thank you for taking the time to provide this valuable feedback, as it assists your school in helping each student find success!  
 You can submit progress reports for specific students by providing feedback for those students and then clicking the "Submit Completed Progress Reports" located at the bottom of this page.

**Your information is secure.**  
 GradesFirst security measures allows your school to adhere to rules and regulations regarding FERPA and student privacy. Thank you for using GradesFirst

**ENG102-21535 English Composition II**

#	Student Name	Is student at risk in this class?	How Many Absences?	Anticipated Grade	Comments
1	Jack, Dawson	<input checked="" type="radio"/> Yes <input type="radio"/> No	9	-	We have not had any tests yet. But Jack has missed all of my key lectures and will definitely need tutoring if he is going to pass this class
2	Smart, Adam	<input type="radio"/> Yes <input checked="" type="radio"/> No		-	
3	Smith, Will	<input type="radio"/> Yes <input checked="" type="radio"/> No		-	

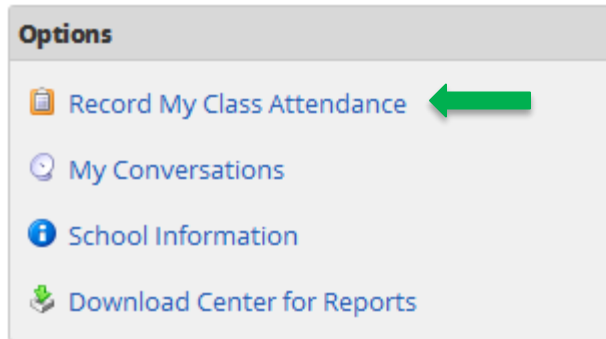
**HIS202-23140 Amer Civ To 1877**

#	Student Name	Is student at risk in this class?	How Many Absences?	Anticipated Grade	Comments
1	Jack, Dawson	<input type="radio"/> Yes <input checked="" type="radio"/> No		-	
2	Smart, Adam	<input type="radio"/> Yes <input checked="" type="radio"/> No		-	
3	Smith, Will	<input checked="" type="radio"/> Yes <input type="radio"/> No		-	Will is having issues with getting his assignments in on time. He could use some help with time management

## Recording Class Attendance

Step 1: Log into your GradesFirst account

Step 2: On the right side, click on “Record My Class Attendance” and change the term.



Step 3: First choose the course and the date. Once you record attendance press ‘Save Attendance’.

### Course Attendance

LAS VEGAS UNIVERSITY, LAS VEGAS, NV

The image shows two stacked selection screens. The top screen, "Choose a Course", lists three options: "EAD262-04 Seminar (33976)", "EAD298-05 Other (33723)", and "ERE220-16 Lecture (33873)". The bottom screen, "Choose a Date", shows a calendar for March 2016 with the 23rd highlighted. A green arrow points to the "Save Attendance" button at the bottom of the date selection screen.

ERE220-16 Lecture (33873) Research In Educ : Wednesday, Mar. 23, 2016

The image shows the attendance recording interface for "ERE220-16 Lecture (33873) Research In Educ : Wednesday, Mar. 23, 2016". It features a table with columns for "STUDENT", "ABSENCES", "PRESENT?", "ABSENT?", "TARDY?", "EXCUSED?", and "PATTERN". Each row represents a student with their name and a set of radio buttons for attendance status. A "Save Attendance" button is circled in green at the bottom left. At the bottom right, there are buttons for "Present", "Absent", and "Tardy".

STUDENT	ABSENCES	PRESENT?	ABSENT?	TARDY?	EXCUSED?	PATTERN
Adams, Jessica	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Armedilla, Danielle	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Delgado De Encinas, Gabriela	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Escamilla, Andrew	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Gal, Daniel	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Jimenez, Miguel	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Long, Sierra	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Lopez, Marrisona	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Moore, Carrie	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Rosas, Francisco	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Rowe, Melissa	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Sauceda, Mary	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Taylor, Martryce	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report
Vasquez, Marco	0 (0)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Add Progress Report

# Section 14: Student Role

## Request for Tutoring

### Step 1: Log into your GradesFirst account

- Click the GradesFirst Academics link from the My Fresno State portal OR
- Click the GradesFirst link on Blackboard OR
- Go to [fresnostateacad.gradesfirst.com](https://fresnostateacad.gradesfirst.com) and use your Fresno State login/password

### Step 2: Click the “Request Tutor Appt.”

- Link next to the class you need assistance in.



### Step 3: Complete the form

- If you are requesting a specific location, select a location. Otherwise, you can leave it blank.

A screenshot of the 'SEND TUTOR REQUEST' form. The form has a title bar with 'SEND TUTOR REQUEST' and a close button 'X'. Below the title bar is a text input field with the placeholder 'I'm available on...'. Below that is a text area with the instruction: 'Please provide at least one specific day and time, along with any special considerations that may apply.' Below the text area is a dropdown menu labeled 'Select Location'. Below the dropdown is a 'Message Preview' box containing the following information: 'SUBJECT: New Tutor Appointment Request', 'STUDENT: Julianna Abdella', 'COURSE: MATH45-09 Lecture (34862) What Is Math', 'AVAILABILITY: Incomplete', and 'LOCATION: None Selected'. Two green arrows point to the text area and the 'Select Location' dropdown. To the right of the form is a yellow callout box with the text: 'This is a REQUEST for tutoring. Efforts will be made to accommodate your request. You may be directed to group or walk-in tutoring.'

### Step 4: Your request will be sent to a tutor coordinator

- You should receive a response within 24 hours. Please check your Fresno State email for details.

## Request for Advising Appointment

### Step 1: Log into GradesFirst

- Log into [www.my.fresnostate.edu](http://www.my.fresnostate.edu)
  - From **My Menu**, click on **GradesFirst –Academics**
  - Click on **Get Advising**

### Student Home

Class Information Reports Calendar Send a Message

Classes This Term

Actions	CLASS NAME	PROFESSOR	DAYS/TIMES	MID	FINAL	TAKE ACTION
<input type="checkbox"/>						

Discovery. Diversity. Distinction.

**Get Advising**

Quick Links

Take me to...

School Information

### Step 2: Reason

- 1<sup>st</sup> box: Select Reason, for example: **Academic Coaching (Study Strategies)**
  - 2<sup>nd</sup> box: Select Location & Advisors, for example: **SupportNet (Academic Coaching)**

Reason > Location & Advisor > Time Select > Confirm

What location do you prefer?

Learning Center (Library Collections Level) 559.278.3052

Which advisor? You may select more than one.  
*If you don't have a preference, just click Next.*

Any Advisor

Back Next

### Step 3: Location and Advisor

- 1<sup>st</sup> box: Learning Center
- 2<sup>nd</sup> box: Optional – You may choose a specific advisor. If you leave this box blank, you will be scheduled with any advisor in that office.

Reason > Location & Advisor > Time Select > Confirm

To help you get advising quickly, please tell us why you'd like to meet with an advisor.

-- please select one --

Academic Coaching (Study Strategies)

#### Step 4: Time Select

- Find the best date that works for you and choose the best time.

prev week **Appointment Times For The Week Of November 28** next week

Mon, Nov 28	Tue, Nov 29	Wed, Nov 30	Thu, Dec 01	Fri, Dec 02
Morning 2 Available	Morning 1 Available	Morning 2 Available	Morning 2 Available	Morning 3 Available
Afternoon 5 Available	Afternoon 6 Available	Afternoon 2 Available	Afternoon 4 Available	Afternoon 3 Available

Can't find a time that works in the next couple of weeks? [View Walk-in Times](#) or [Request Advising Appointment](#)

Back Next

#### Step 5: Review and Confirm Appointment

- View **Appointment Details**, enter a comment about what you want to discuss, set a reminder, and then click **Confirm Appointment**.

Reason Location & Advisor Time Select Confirm

Your appointment has not been scheduled yet. Please review and click Confirm Appointment to complete.

**Appointment Details**

Who:  with   
Why: SupportNet (Academic Coaching)

When: Friday, December 02  
8:30am - 9:00am  
Where: Learning Center (Library Collections Level) 559.278.3052

**Additional Details**

Is there anything specific you would like to discuss with Jamaal?

Would you like to set a reminder?

Email will be sent to

Back **Confirm Appointment**