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These instructions are for Phase I of the GradesFirst implementation.
During Phase I, the Advising Report and the Notes functionality will be used.
Chapter 1: Login

GradesFirst is web-based. The installation of software is not necessary.

1. Open a browser, such as the Internet Explorer, Chrome, Firefox or Safari.

2. Enter the URL for GradesFirst.
   The login page displays.

   Notes: As of this writing, the URL for access to GradesFirst has not been determined. You will be advised of the URL prior to the 03-17-14 go live date.

   To preview the software and to practice creating Advising Reports and Notes, use the training database at https://akron-training.gradesfirst.com/home/. Student data has been uploaded for testing and training purposes only.

3. Enter your Uanet ID and password.

4. Click on Login or press the ENTER key.
   Your GradesFirst home page displays.
Chapter 2: Create an Advising Report

The Advising Report is the primary means of documenting advising sessions, including the following:

- Appointment
- Walk-in
- Telephone
- Copy/Paste Advising Related Email

There are four basic steps to create an Advising Report to document an interaction with a student.

1. Select the student.
2. Select the option Advising Report.
3. Enter the data in the Report.
4. Save the Report.
Step 1: Select the Student

There are several methods to select a student. In this first phase of the implementation of GradesFirst, here are two methods.

A. Select a student who is assigned to you
B. Select any student using search

Method A: Select a Student who is Assigned to You

1. On the Advising Home page, select the My Assigned Students tab.

   ![Image of the Advising Home page showing the My Assigned Students tab]

   A list of your assigned students displays.

2. Mark the checkbox for the student, whose Advising Report is to be created.

   ![Image of the Advising Home page with a list of students and a checkbox selected for a student]
**Method B: Select Any Student Using Search**

1. On the top right corner of the GradesFirst window, click on the Search link.

   ![Search link](image)

   The Search page displays.

2. At Search for, Students displays by default. If not, click on the down arrow to select Students from the list.

   ![Select Students](image)

3. Enter a search criterion in the Keywords box. For example:

   - an ID, 1229982
   - OR-
   - a last name (or partial last name)

   ![Search criteria](image)
4. Select any of the checkboxes as criteria, if appropriate. More than one checkbox may be selected.

   [ ] My Students Only  [ ] At-Risk Students Only  [ ] Include Inactive

5. Click on the Search button.

   [ ] Search

The Search results display at the bottom of the page.

6. ALTERNATIVELY: Click on the Switch to Advanced Search button, if more refined criteria are needed to locate the student.

7. Mark the checkbox for the student, whose Advising Report is to be created.
Step 2: Select Advising Report

1. Click on the Advising Report button, which is above the list of students on the Home page or above the Search Results on the Search page. The Advising Report popup displays.

The Advising Report has two areas:
- Appointment Details
- Appointment Summary and Reminders

Appointment Details

Appointment Summary and Reminders
Step 3: Enter the Data for the Advising Report

1. Complete the Appointment Details:
   Required fields are indicated by an asterisk *.
   - **Reason**: Defaults to Advising. Click in the field to select a different reason from the list.
   - **Course**: Defaults to none. Click to select from a list of the student’s courses.
   - **Date of visit**: Defaults to today’s date. Click in the field to display a calendar to select a different date.
   - **Location**: Select from the list.
   - **For each attendee**:
     - **Arrived**: Defaults to the time at which you clicked on the Advising Report button. This can be changed.
     - **Departed**: Optional. Enter a departure time, if you wish.
   - **This person attended**: Defaults to checked. Click to remove the checkmark for the student to indicate a “no show.” If the checkmark is removed, the Report Details section of the Advising Report no longer displays.

![Appointment Details Example](image-url)
2. **Complete the Appointment Summary and Reminders:**

**Summary:** Enter your advising notes about this interaction with the student. These notes replace the advising notes that were previously entered into NOLIJ.

**Suggested time** and **Suggested date:** OPTIONAL: Enter a date (and a time, if desired) as a suggestion for a follow up to the current appointment. This suggested information is included in the Advising Report. This does not create an appointment.

---

**Step 4: Save the Report**

1. At the bottom of the Advising Report window, click on Save this Report.
Indicate that a Student was a No Show

Follow the previous instructions for Creating an Advising Report. In the Advising Report, locate the student as an attendee and unmark the box This person attended. Save the Report.
Chapter 3: Review or Edit Advising Reports

If the Advising Report to review is one that you recently created, follow these instructions. A recently created report will display in the list at the bottom of your Advising Home tab.

1. Click on the Home tab.

2. In the Advisor Reporting area at the bottom of the page, click on the Recent Reports You Created tab.

3. Click on the Details link for the Advising Report to be reviewed. The Advising Report displays.

4. To close the report, click on the Advising Report window’s X.

   **Note:** To make changes to a report that you created, click on the Edit link in the upper right corner of the Advising Report window. When the edit is complete, click on Save this Report at the bottom of the window to save your changes. You can edit only your own reports.

If the Advising Report to review is not on the Recent Reports You Created tab, follow these instructions.

1. Advising Reports are term-specific. This means that when a list of Advising Reports displays, it will be the Advising Reports for the selected term only. GradesFirst defaults to showing the current term.

   Change the term, if necessary, by clicking on the Terms box in the upper right corner of the GradesFirst window.
2. With the correct term selected, locate the student. If the student is your advisee, you may:
   - Click on the Home tab.
   - In the list of My Advisees, click on the student’s name. The student’s profile page displays.

-OR-

For any student, you may:
   - Click on the Search link in the upper right corner of the window.
   - At Search for, select Students.
   - In the Keywords box, enter the student’s last name or ID.
   - Mark any of the checkboxes as appropriate.
   - Click on Search.
   - In the Search results, click on the student’s name. The student’s profile page displays.

Note: If you are having trouble locating the student, click on the Advanced Search button on the Search page. Additional criteria fields are available to define your search.
3. Below the student’s name, click on the Reports/Notes tab.
4. To view information for an Advising Report:
   • Hover the mouse pointer over the data in the Summary column to review the Appointment Summary data entered by the Advisor.
   
   -OR-
   Click on the Details link for the report. This displays the entire Advising Report for that date.
   • To close the open Advising Report, click on the X in the upper right corner of the Report.

   **Note:** To make changes to a report that you created, click on the Edit link in the upper right corner of the Advising Report window. When the edit is complete, click on Save this Report at the bottom of the window to save your changes. You can edit only your own reports.

5. To view the Advising Reports for a different term:
   • Click on the Term box in the upper right corner of the GradesFirst window.
   • Select a Term from the list that displays.

   The list of Advising Reports for that Term displays on the student’s profile page.

   **Note:** Advising Reports are term-specific. This means that only the Advising Reports for the selected term will display on the student’s profile page.

   Notes are non-term specific. This means that all the Notes display on the student’s profile page, no matter which term is selected. All Notes always display on the student’s profile page.
Chapter 4: Run an Advising Summary Report

This report produces results similar to those of a query in PeopleSoft. For example, you may use this report to summarize all of your Advising Reports for a period of time for a particular student or a group of students.

This report allows a wide range of criteria to be set, so you may limit the summary Advising Reports that are included in the report.

The GradesFirst system saves the reports you ran on the Reports page for 30 days. To view your reports for the last 30 days, go to your home page. In the Options box on the right side of the page, click on the link for Download Center for Reports.

1. To access the available reports, click on the Reports button in the upper right corner of the window.

   ![Reports](image)

   The Reporting page displays for you to enter the criteria for the report.

2. In the upper right corner of the GradesFirst window, check the selected Term for which the report is to run.

   ![Term - 2014 Spring](image)

3. Under Summary Reports, select Advisor & Tutor Summaries Detail.

   ![Advisor & Tutor Summaries](image)

   The Student Summary Reports page displays.
4. To review a report for a single student:
   - Enter the student’s ID.
   - Select a beginning and ending date for the data to be included in the report.
   - Click on Search.

The report displays below the Search criteria.

Student Summary Reports

The Student Summary Reports show both advising and tutoring evaluations for appointments. Below, only appointments with evaluations will show. To find appointments without evaluations, please use the Tutor Appointments or Advisor Appointments reports.

<table>
<thead>
<tr>
<th>Keywords</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2701165</td>
<td>03/03/2014</td>
<td>03/03/2014</td>
</tr>
</tbody>
</table>

Search [Display/Hide Advanced Search]

Export to Excel

Student Summary Reports

<table>
<thead>
<tr>
<th>Organizer Name</th>
<th>Advisor Name</th>
<th>Categories</th>
<th>Major</th>
<th>Minor</th>
<th>Type Credits</th>
<th>Course No</th>
<th>Evaluation</th>
<th>Appointment No.</th>
<th>Reported Institution</th>
<th>Appointment Type</th>
</tr>
</thead>
</table>
5. **To review a report for a group of students:**

- Click on the Show/Hide Advanced Search button.

![Student Summary Reports](image)

The Student Summary Reports shows both Appointments or Advisor Appointments.

![Search/Show/Hide Advanced Search](image)

The Advanced Search page displays.

- Click in a field to enter data or to select from a list. When a list displays, you may select multiple values.

![Classification](image)

- Enter a Begin Date and End Date.
- Review the checkboxes at the bottom of the Search area and mark those that are applicable.

  The more criteria you enter, the narrower/more specific your search results will be.

- Click on Search.

The report displays below the Search criteria.

6. Use the scroll bar at the bottom of the window to review additional columns of data.

![Table](image)

In Excel, the Appointment Summary data may be easier to read.
7. **OPTIONAL:** To remove or add columns for the report’s display:
   - Point to one of the column headers in the report.
   - Click on the down arrow.
   - In the list that displays, point to columns.

   ![Column List](image)

   A list of all the columns that are available displays.
   - Unmark or mark any columns to exclude/include in the report. You may want to include the student ID. This field is listed at the top of the column list.

   ![Column List](image)

   Alternatively, if you wish to remove columns from the report, export the report to Excel and hide the columns you do not want. See the next step for instructions.

8. **OPTIONAL:** Click on the Export to Excel button to send the data to Excel.

   ![Export to Excel](image)

   A message displays in the upper right corner of the window.

   ![Excel Export Alert](image)

   When the report is completed, an additional message displays.

   ![Report Complete](image)
9. In the message, click on the link for Download Center for Reports. Your Download Center displays with a list of your reports.

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Username</th>
<th>Type</th>
<th>Status</th>
<th>Creation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>gradefirst_summaryreportdetail2014-03-03.xls</td>
<td>William</td>
<td>summary report</td>
<td></td>
<td>03/03/2014</td>
</tr>
<tr>
<td></td>
<td>Torgler</td>
<td>detail report</td>
<td></td>
<td>03/03/2014</td>
</tr>
</tbody>
</table>
```

10. In the Name column, click on the report to open. If the Save As dialog box displays, save the report to your desktop or another location that you easily can remember.

11. If this message displays, click on Open.
12. If the following message displays, click on Yes.

The file you are trying to open, ‘gradesfirst-summariesreport73-03-2013.xls’, is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes  No  Help

The report displays in Excel.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>University of Akron - Campus</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Student Summary Reports</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>02/01/2014 to 03/08/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Date/Time: 03/03/2014 11:03 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Printed By: William Torgler</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Organizer name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Student name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Categories</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>E-mail Address</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Classifications</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Majors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Torgler, William
- Torgler, William
- Torgler, William

13. Note that the Appointment Summary data displays in the last column.

Summary
Reviewed goals for this term. Scheduled appointment for tomorrow.
Reviewed summer schedule.
14. If you wish to print the report from Excel:
   Hide any columns that are not to be printed.
   - Right click on the header of the column to be hidden. The headers are the alphabetic designators, such as C.
     Note: Multiple adjacent columns can be selected by dragging the mouse across the headers.
   - Select Hide from the shortcut menu.
15. **To Unhide columns:**

- Select the column header that is before the column to unhide and the column header that is after the column to unhide. For example, to unhide column C, drag the mouse across the B and D headers.

- Right click on one of the selected headers.

- Select Unhide from the shortcut menu that displays.
Chapter 5: Create a Note

Notes can be used for a variety of purposes. One of those purposes is to attach a file to be included in the student’s profile.

There are four basic steps to create a Note.

1. Select the student.
2. Select the option Note.
3. Enter the data in the Note and/or attach a file.
4. Save the Note.
Step 1: Select the Student

There are several methods to select a student. In this first phase of the implementation of GradesFirst, here are two methods.

A. Select a student who is assigned to you
B. Select any student using search

Method A: Select a Student who is Assigned to You

1. On the Advising Home page, select the My Assigned Students tab.

A list of your assigned students displays.

2. Mark the checkbox of the student for whom a Note is to be created.

---

![Image of the Advising Home page with My Assigned Students tab selected.]

---

![Image of the Advisor Reporting section with a table showing student notes.]

---
Method B: Select Any Student Using Search

1. On the top right corner of the GradesFirst window, click on the Search link.

   ![Search link](image1.png)

   The Search page displays.

   ![Search page](image2.png)

   Search for **Students**.

   ![Keywords box](image3.png)

   Enter a search criterion in the **Keywords** box.

   For example:

   - an ID, 1229982
   - a last name (or partial last name)

   ![Search examples](image4.png)
4. Select any of the checkboxes as criteria, if appropriate. More than one checkbox may be selected.

5. Click on the Search button.

The Search results display at the bottom of the page.

6. ALTERNATIVELY: Click on the Switch to Advanced Search button, if more refined criteria are needed to locate the student.
### Step 2: Select Note

1. Click on the Note button, which is above the list of students or above the Search results. The Note popup displays.

   ![Note Popup](image)

   **Add a Note**
   - **Note (Required)**
   - **Note Reason**
   - **Attachments**

   **Permissions & Settings**
   - **Viewable only by author of note**
   - **Viewable by student**
   - **Show on Printed Student Report**

   **Task Tracking**
   - **Due Date (optional)**
   - **Is Complete?**
   - **Show on My Task List**

   **Save Note**  **Cancel**

   *This setting probably will not display or be available at UA.*
Step 3: Enter the Data for the Note

1. Complete the Note details.
   Required fields are indicated by an asterisk *. The other fields are optional.
   
   **Note (Required):** Enter the text for the Note.
   
   **Note Reason:** Select a Reason from the list.
   
   **Attachments:** To attach a file, click on the Browse or Choose File button (button name differs in different browsers) to locate the file stored on your computer or on accessible drives and upload the file to GradesFirst. The file name displays in the Note to confirm that the upload was successful. More than one attachment may be uploaded to a note.

   **Permissions & Settings:** Mark the box Viewable by student if the student may view the note. Mark the box Show on Printed Student Report if the note should appear on the Student Development Report.

Step 4: Save the Note

1. At the bottom of the Note window, click on Save Note.
Chapter 6: Review Notes

Follow these instructions to review any Notes that were created in GradesFirst or uploaded to GradesFirst from Nolij.

When UA first begins to use the GradesFirst system, the advising notes currently stored in Nolij will not be in the GradesFirst system. Initially, you will review those notes in Nolij. However, within a few weeks of go live, the advising notes in Nolij will be uploaded to GradesFirst as an attachment to a Note. You will access all advising notes in GradesFirst after that time.
1. **If the student is your advisee, you may:**
   - Click on the Home tab.
   - In the list of My Advisees, click on the student’s name.
   - The student’s profile page displays.

   - **OR**-

   For any student, you may:
   - Click on the Search link in the upper right corner of the window.
   - At Search for, select Students.
   - In the Keywords box, enter the student’s last name or ID.
   - Mark any of the checkboxes as appropriate.
   - Click on Search.
   - In the Search results, click on the student’s name.
   - The student’s profile page displays.

   **Note:** If you are having trouble locating the student, click on the Advanced Search button on the Search page. Additional criteria fields are available to define your search.
2. Below the student’s name, click on the Reports/Notes tab.

![Report/Notes Tab](image)

### PROGRESS REPORTS

<table>
<thead>
<tr>
<th>DATE</th>
<th>CLASS</th>
<th>ID</th>
<th>GPA</th>
<th>GPAX</th>
<th>CREDIT</th>
<th>AT PCT</th>
<th>AT PCT 2/3</th>
<th>AT PCT 3/4</th>
<th>AT PCT 4/4</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
</tr>
</tbody>
</table>

This student has not received any progress reports for the current term.

### ADVISOR REPORTS

<table>
<thead>
<tr>
<th>DATE</th>
<th>REPORT</th>
<th>CLASS</th>
<th>ID</th>
<th>GPA</th>
<th>GPAX</th>
<th>CREDIT</th>
<th>AT PCT</th>
<th>AT PCT 2/3</th>
<th>AT PCT 3/4</th>
<th>AT PCT 4/4</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td>02/06/2014</td>
<td></td>
</tr>
</tbody>
</table>

### NOTES ABOUT STUDENT

- Test
- Test

### RECENT VISITS TO THE STUDENT SUPPORT CENTERS

- Student has not had any recent visits to Student Support Centers.

**Academic Information**

- **Classification**: Freshman
- **Major**: Chemical Engineering
- **E-mail**: Student@uakron.edu
- **Advisors**: Advisor 1, Advisor 2

**Cumulative GPA**

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPA</td>
<td>3.5</td>
</tr>
<tr>
<td>Hours Earned</td>
<td>38</td>
</tr>
</tbody>
</table>

**Current Courses**

- *Course 1*
- *Course 2*

**Advising Notes**

- Submitted a new study plan for 2018 Spring

**Contact Information**

- **Local Address**: 111 Main St, Akron, OH 44301
- **Phone**: 330-972-HELP
- **Email**: pstrain@uakron.edu

**Personnel Information**

- **Advisor**: Advisor 1
- **Department**: Chemistry

**Recent Activities**

- Submitted a new study plan for 2018 Spring
- Attended a meeting with the advisor

**Notes**

- Test results have improved
- Submitted a new study plan for 2018 Spring

**Special Notes**

- **Test Notes**: (Side note: 
  - Test 1: Improved
  - Test 2: Stayed consistent)

**Recent Events**

- Attended a group study session
- Submitted a new study plan for 2018 Spring

**Contact Information**

- **Local Address**: 111 Main St, Akron, OH 44301
- **Phone**: 330-972-HELP
- **Email**: pstrain@uakron.edu

**Personnel Information**

- **Advisor**: Advisor 1
- **Department**: Chemistry

**Recent Activities**

- Submitted a new study plan for 2018 Spring
- Attended a meeting with the advisor

**Notes**

- Test results have improved
- Submitted a new study plan for 2018 Spring

**Special Notes**

- **Test Notes**: (Side note: 
  - Test 1: Improved
  - Test 2: Stayed consistent)
3. **In the Notes about Student area:**
   - Hover the mouse pointer over the data in the Note column to review the Note.
   - In the Attachments column, click on the link for an attachment to view it. If the save as dialog box displays, save the file to your desktop or a location where you can easily locate it.
Chapter 7: Run a Notes on Students Report

This report produces results similar to those of a query in PeopleSoft.

1. To access the available reports, click on the Reports button in the upper right corner of the window.

![Reports](image1)

The Reporting page displays.

2. Under Student Information Reports, select Notes.

![Student Information Reports](image2)

The Notes on Students page displays for you to enter the criteria for the report.

3. To review a report for a single student:
   - Enter the student’s ID.
   - Select a beginning and ending date for the data to be included in the report.
   - Select other criteria, as desired.
   - Click on Search.

![Notes on Students](image3)

The report displays below the Search criteria.
4. To review a report for a group of students:
   - Click on the Show/Hide Advanced Search button.
   - Click in a field to enter data or to select from a list. When a list displays, you may select multiple values.
   - Select a Begin Date and End Date.
   - Review the checkboxes at the bottom of the Search area and mark those that are applicable.
   - The more criteria you enter, the narrower/more specific your results will be.
   - Click on Search.

   The report displays below the Search criteria.
5. **OPTIONAL: To remove columns from the report’s display:**
   - Point to one of the column headers in the report.
   - Click on the down arrow.
   - In the list that displays, point to columns. A list of all the columns that are available displays.
   - Unmark or mark any columns to exclude/include in the report.
   You may want to include Student ID, which is near the top of the column list.

Alternatively, if you wish to remove columns from the report, export the report to Excel and hide the columns you do not want. See page 17 for instructions to download to Excel.