

GradesFirst 2.0

GradesFirst 2.0 is a web-based tool by the Education Advisory Board (EAB) to coordinate, target, and report on advising, tutoring, and other student success services. These functions allow WCU to have a comprehensive student success solution that brings student support systems and analytics to aid in retention and graduation rates. You can access GradesFirst 2.0 through your myWCU homepage. In the “Quick Links” box there is an “Advising/Tutoring” website link. This link will automatically log you into GradesFirst 2.0. The system will be updated every night. Please call the Advising Center at 828-227-7753 if you have any questions.

Your Homepage

1) Term

- a. Changing the term will show classes for which the student is/was registered during that term.

2) Quick Search

- a. Using the magnifying glass on the top right corner, you can search by the student’s ID number, name, or Catamount email. GradesFirst uses the first name as it appears in Banner (SPAIDEN). If a student goes by their middle name, you will have to search by their first or last name.

3) Help Center

- a. You are able to view training videos and articles with detailed information about how to navigate GradesFirst 2.0.

4) User Role

- a. By clicking on the down arrow, you are able to change your role between advisor and professor.

5) Upcoming Appointments

- a. This tab shows who has made appointments, including the date, time, student’s name, and any student comments.

6) My Availability

- a. You can create open appointments, allowing students to schedule with you, specifying a date range, or certain days and times.

7) Advisee list

- a. If a student does not show up on this list, it is because they might not be assigned correctly within Banner or they are not active students for the current term.

8) Issue Alert

- a. This is our Issue Alert system. You can report a student from your homepage and also from the student’s homepage.
 - i. The academic issues will be sent to the Professional Advisor. The non-academic issues will be sent to Student Crisis Response Team within Student Affairs.

****See page 2 for a visual of these homepage options.****

Advisor's Homepage

Campus
Student Success Collaborative™



1

Summer 2016

2



?



Advisor Home

4

Students Upcoming Appointments My Availability Advising Center

My Assigned Students For Summer 2016

5

6

Actions

ALL

STUDENT NAME

ID

WATCH LIST

CUM. GPA

PREDICTED RISK LEVEL

No matching records found

7



Actions

I want to...

Issue an Alert

8

Quick Links

Take me to...

[Appointment Campaigns](#)

[School Information](#)

[Download Center for Reports](#)

Upcoming Appointments

You have no upcoming appointments.

Help Center

You can view training videos and articles with detailed information about how to navigate GradesFirst 2.0. Click on the "?" on the top right hand side for the Help Center.

The screenshot shows the Help Center interface. At the top left is a "HELP CENTER" header. Below it is a 3x3 grid of blue boxes, each containing a category name. The categories are: Getting Started (highlighted with a white border), For Advisors, For Tutors; For Professors/Instructors, For Student Support Services, Institution Reports; For Application Administrators, For Students, For Athletics. To the right of the grid is a user profile for Kristan Blanton and a search bar. Below the grid is a section titled "FOR PROFESSORS/INSTRUCTORS" with two columns of links:

Enhancing Workflow	Completing the Student Picture
<ul style="list-style-type: none">Advanced Search and Actions: Saved Searches and Worklist CreationAdvanced Search and Actions: Actions MenuAdvanced Search and Actions: Additional FiltersCase Management: My Assigned StudentsCase Management: CategoriesCase Management: Appointment Scheduling See all 10 articles	<ul style="list-style-type: none">Student Profile: OverviewStudent Profile: Success ProgressStudent Profile: Class InfoStudent Profile: TranscriptStudent Profile: Reports/NotesStudent Profile: Risk, Skills Analysis, 2.5 Risk Model See all 10 articles
Data-Driven Advising	
<ul style="list-style-type: none">Campaigns: Managing Your CampaignCase Management: Progress ReportsCampaigns: Progress Report CampaignsCampaigns: Appointment Campaigns	

Student's Profile Page

1) Homepage

a. Overview tab

- i. At a glance you will be able to see the likelihood that a student will be successful in their current major. (Poor grades, missed success markers, and Cumulative GPA). Success Markers have been put in place by WCU's Department Heads and Program Directors.

b. Success Progress tab

- i. Shows the trend of the student's progress at WCU in graph form.

c. Reports/Notes tab

- i. This will show you any past notes on the student.

d. Class Info tab

- i. This is the student's schedule based on the current term.
- ii. MID = 5th week grades and final grades are pulled from Banner.
- iii. You can view their academic transcript from WCU and transfer coursework.

e. Major Explorer tab

- i. Information about their predicted risk level in multiple majors.

f. More tab

- i. Your appointment calendar through GradesFirst.
- ii. Study Hall- this is required for certain student athletes.
- iii. Conversation- This shows any communication with the student through GradesFirst 2.0.

2) Actions Box

a. Message Student

- i. This sends an email to the student's Catamount email. It will show a GradesFirst address as the sender, not your WCU email address.

b. Add a Note on this Student

- i. Record notes about student meetings and attach documents.

c. Add a Reminder to this Student

- i. You can set a reminder on a student and can view it under the student's Report/Notes tab.

d. Schedule an Appointment

- i. You can schedule an appointment with a student without creating availability for the student to see.

****See page 5 for a visual of these Student Profile options.****

Example of a Student's Homepage

The screenshot shows a student's homepage with various sections and navigation elements.

Top Navigation: Campus Student Success Collaborative™, Summer 2016, Search, Help, Logout.

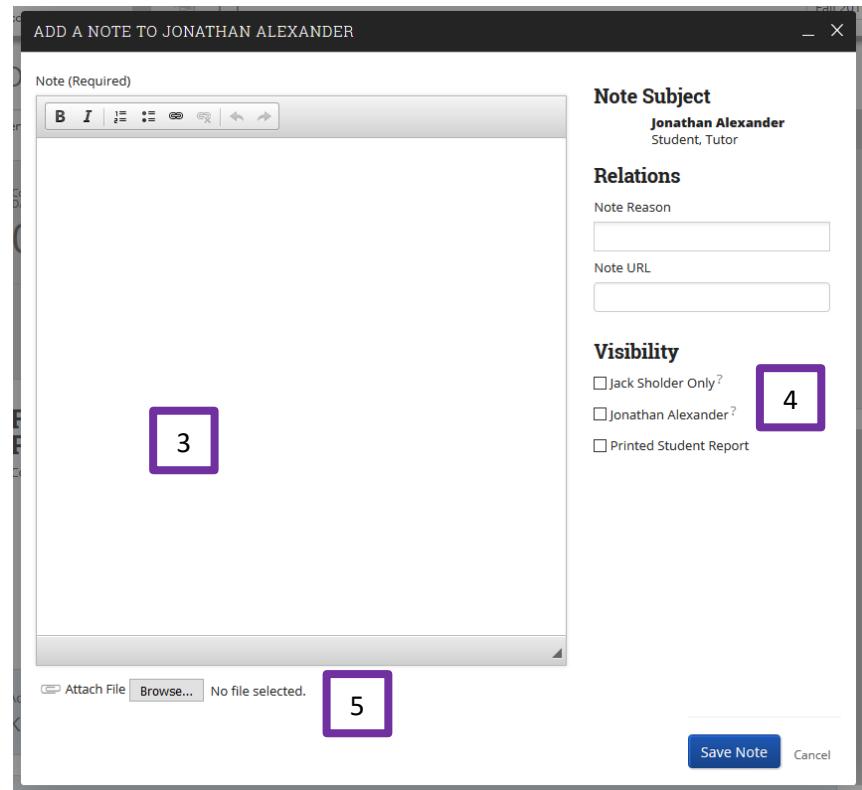
Left Sidebar: Icons for Home, Mail, Calendar, Folders, Chart, Gavel, Magnifying Glass, Plus, Document, and Gear.

Main Content Area:

- Overview:** Shows student statistics:
 - Course Grade D/F: 0
 - Repeated Courses: 0
 - Withdrawn Courses: 0
 - Missed Success Markers: 0
 - Cumulative GPA: 3.905
 - Total Credits Earned: 122.00
 - Credit Completion % at this Institution: 100%
 - Predicted Risk Level: Low
- Staff Alerts:** A list of actions:
 - I want to...
 - Message Student
 - Add a Note on this Student
 - Add a Reminder to this Student
 - Report On Advising
 - Schedule an Appointment
 - Issue an Alert
- Film and Television Production:** Major information:
 - STUDENT ID: 920
 - CLASSIFICATION: Senior
 - MOST RECENT ENROLLMENT: Summer 2016
 - ADDITIONAL ROLES: Tutor
- Student Info:** Personal details:
 - Age: 23
 - DOB: 11/05/1992
 - Address: APT 155-1B, The Summit At Cullowhee, Cullowhee, NC 28723
 - Email: !@catamount.wcu.edu
 - Home: 919-
 - Cell: 0
 - Work: 0
- Bottom Buttons:** Advisors and Tutors.

Saving a Note on a Student's Record

- 1) Type the student's name, ID number, or Catamount email into the Quick Search box in the top right corner.
- 2) Once you are on the student's homepage, click the "Add a Note on the Student" link on the right hand side.
- 3) Type into the "Note" box (*see image*).
- 4) Visibility? (*see image*)
 - a. If you check only the box with your name, then you are the only one who will be able to view the note.
 - b. If you check the box with the student's name, then the student will be able to view the note.
 - c. If you don't check either box, then any faculty/staff with access to notes on GradesFirst 2.0 will be able to view it, but the student will not have access to the information.
- 5) Attach File
 - a. You can attach PDFs, Word documents, or emails into GradesFirst 2.0. Save emails in .txt format.

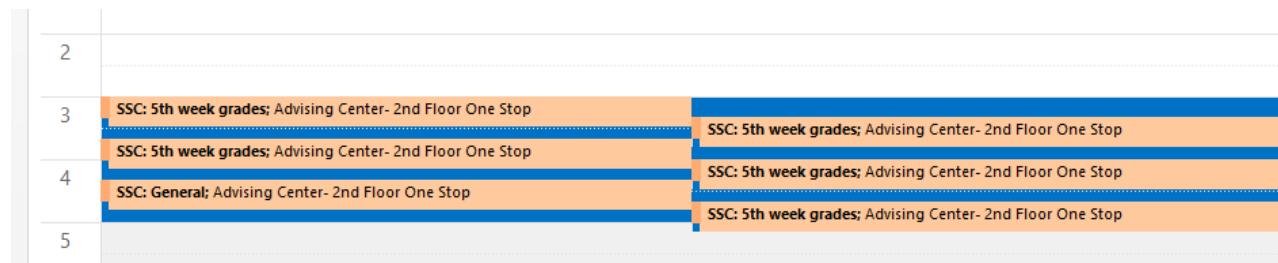


Calendar Integration

- 1) Click on the Calendar icon on the left hand side.
- 2) You will be able to see your calendar with the appointments at a glance. If you want to sync to your Outlook calendar, click on the **Subscriptions** tab and click "Setup Calendar Integration."
- 3) You also have the option of syncing your Outlook calendar to your GradesFirst 2.0 calendar by clicking on "Setup Exchange Calendar Integration." Outlook information is shown as Busy blocks.

The screenshot shows a web-based calendar interface for the Western Carolina University Student Success Collaborative. The top navigation bar includes links for 'Campus', 'Student Success Collaborative', and a search bar. The main area is titled 'My Calendar' with tabs for 'Calendar View', 'List of Calendar Items', and 'Subscriptions'. A purple box labeled '1' highlights the calendar icon in the sidebar. Another purple box labeled '3' highlights the 'Subscriptions' tab. A legend at the bottom shows color-coded categories: ADVISING (red), ASSIGNMENT (orange), TUTORING (green), GENERAL (blue), COURSE (light blue), FREE BUSY (purple), and CANCELLED (grey). The main calendar view shows July 2016, with days from Sunday to Saturday. Specific events are color-coded according to the legend. For example, '8a Busy' on Monday, July 4, is colored red (ADVISING). Other events like '8:30a Busy' and '10:30a Busy' are orange (ASSIGNMENT). Some events have descriptions below them, such as 'Change Major/Minor' and 'Course Withdrawal'.

The screen shot below is showing how the GradesFirst 2.0 appointments look in Outlook.



Searching within GradesFirst 2.0

- 1) You can search all students in GradesFirst 2.0 by clicking on “Show Advance Filters.” See the different filters below.

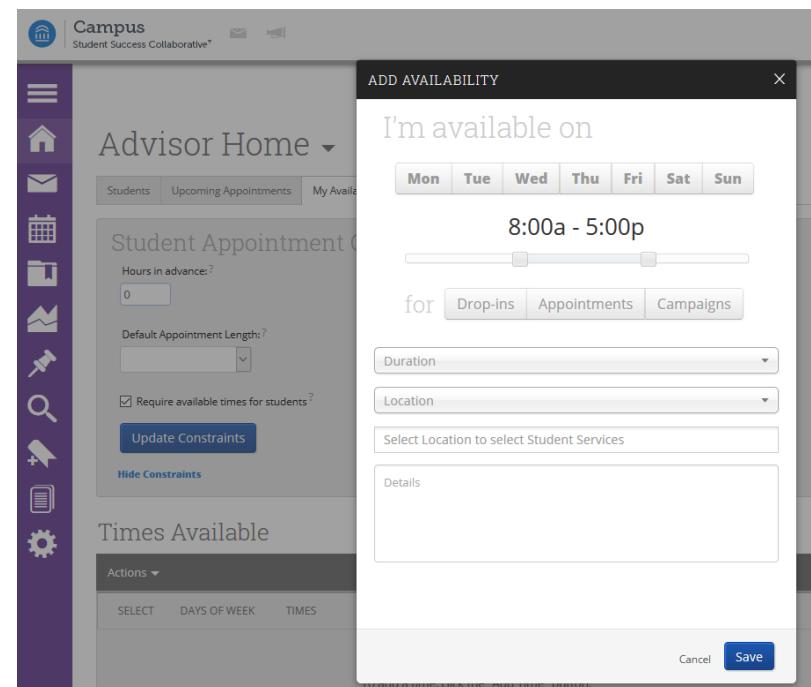
New Search

The screenshot shows the 'New Search' interface in GradesFirst 2.0. At the top, there is a header bar with a 'Saved Searches' dropdown, a 'Keywords' input field, and three dropdown filters: 'Type' (set to 'Students'), 'Enrollment Status' (set to 'Enrolled'), and 'Enrollment Term' (set to 'Summer 2016'). A purple box highlights the 'Show Advanced Filters' checkbox, which is checked and displays the number '1'. Below the header, there are several expandable sections: 'Student Information' (First Name, Last Name, Student ID, Tag, Watch List), 'Area of Study' (College/School, Degree, Concentration, Major), 'Performance Data' (GPA, Hours, Credits), 'Summer 2016 Data' (Classification, Term GPA), 'Course Data' (Course, Section, Status), and 'Assigned To' (Advisor, Tutor, Coach). At the bottom left is a 'Search' button, and at the bottom right are two checkboxes: 'My Students Only' and 'Include Inactive'.

How to Create Availability

- 1) Click on the **My Availability** tab.
- 2) Click on the **Actions** drop down menu.
- 3) Select the **Add Time** option.
- 4) Choose the day of the week you would like to have open appointments.
 - a. You can choose to do multiple days at the same time if you want to have a recurring appointment time. (MWF 3-4pm)
- 5) Use the Scroll boxes to select the range of time for the appointments.
- 6) Click on the “Appointments” button.
- 7) Choose from the drop down menu to select how long you would like to have these appointments open.
 - a. Forever, term only, or range of dates.
 - b. If you choose range of dates, then you will be asked the start date and the end date.
 - c. To create availability for one day only, select the same start and end date.
- 8) Click on “Location” and choose Faculty Advisor’s office.
- 9) Select the Student Services that are listed. (Faculty Advising Appointment or Virtual Advising Appointment)
- 10) Lastly, click the blue “Save” button.
- 11) You can then view your availability under the **My Availability** tab.

- a. If the availability is not open for today’s date, it will show in pink and have an inactive/Edit hyperlink. Please note that students will still be able to see these appointments.



Times Available

Actions ▾					
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT
<input type="radio"/>	Wed	4:00p-5:00p	July 20, 2016 to July 20, 2016	Advising Center- 2nd Floor One Stop	Registration For Appointments
<input type="radio"/>	Thu	3:00p-5:00p	July 21, 2016 to July 21, 2016	Advising Center- 2nd Floor One Stop	Transfer Issues, Academic Standing, Change Major/Minor, General, Registration , University Withdrawal For Appointments

Directions for Students to Make an Appointment

Use the directions below to let students know how to make an appointment with you through GradesFirst 2.0.

1. Log into myWCU and click on the Advising/Tutoring link in the Quick Links box.
2. Click the blue "Get Advising" button on the right hand side of the screen.
3. Select the type of advising you are seeking (Faculty Advising).
4. Select the reason for the appointment from the drop down menu (Faculty Advising Appointment).
5. Click the blue "Next" button.
6. Select the office Faculty Advisor's Office and the select your faculty advisor.
7. Click the blue "Next" button.
8. You will now see the Advisor's availability split between a Morning and Afternoon option. Use the arrow buttons to change the weeks
9. Click on the blue button for Morning or Afternoon and then select a time.
10. Click the blue "Next" button.
11. You will now see your appointment details. You can add additional comments or click to get a reminder by email or text. (Text reminders require you to enter your mobile number.)
12. Click the "Confirm Appointment" button.

Appointment Campaign

1. Before you start the campaign process you need to make sure you have availability in GradesFirst 2.0 that matches the reason for the campaign reason.
2. Click on "Appointment Campaign" link on the right hand side.
3. Click on "Appointment Campaign" link on the right hand side again.
4. Complete all fields that are shown in screen shot to the right.
5. Click "Continue" and then you will be able to either invite all your assigned students to this campaign or choose Advance Search
6. With the Advance Search option, you can choose by major, course, GPA, hours, advisor, etc.
 - To add the students to the campaign you will need to click on box beside "All", then click on "Actions" and select "Add selected Users and Search for More"

Define Campaign

The screenshot shows the 'Define Campaign' form. It includes fields for Campaign Name (Spring 2017 Registration), Begin Date (10/24/2016), End Date (11/11/2016), Campaign Type (Advising), Appointment Length (20 min), Slots Per Time (1), Appointment Limit (1), Course or Reason (Faculty Advising Appointment), and Location (Faculty Office). At the bottom are 'Cancel', 'Save and Exit', and a large blue 'Continue' button.

Campaign Name:	Begin Date:	End Date:
Spring 2017 Registration	10/24/2016	11/11/2016
Campaign Type:	Appointment Length:	
Advising	20 min	
Slots Per Time:	Appointment Limit:	
1	1	
Course or Reason:	Location:	
Faculty Advising Appointment	Faculty Office	

Cancel Save and Exit Continue

7. You will be given the opportunity to review the students in the campaign. If you want to take someone off just click the box beside their name and click “Actions” then “Remove”. Then click “Continue”
8. Select the box beside your name and click “Continue”
9. You will then have the opportunity to type in the subject, header for the emails, and any instructions or notes you want to be seen in the email. You will be able to see the Email preview and what the page looks like once they click on the “Schedule Advising Appointment”
10. Last step is to confirm everything and hit “Send” These emails will go to the students’ catamount email.

Spring 2017 advising and registration

Compose Your Message

Subject

Header for emails

Instructions or Notes

Hello [student first name].

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

Schedule an Appointment (campaign link)

You can also copy and paste this address into your web browser:
[campaign link]

Thank you!

Email Preview

Hello [student first name].

Your advisor requests that you schedule an appointment. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

Make sure that you come to this appointment with classes and questions in mind. Please have a printed out degree audit. Click the link below to schedule an appointment with me.

[Schedule Advising Appointment](#)

You can also copy and paste this address into your web browser:
<https://java.campus-training.eab.com/a/ADMaZJB40X>

Any Additional Questions?
Please contact the Administrator at your school for additional information or to answer questions about the nature of this email.

Why am I receiving this?
Your school uses EAB to increase student success and this email was sent as a courtesy to you. If you have any questions regarding the validity or security of this email, please contact your Advising Center, the Administrator at your school, or EAB Support. We will be happy to answer any questions!

Landing Page Preview

Make sure that you come to this appointment with classes and questions in mind. Please have a printed out degree audit. Click the link below to schedule an appointment with me.

Choose A Day

July 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		

Choose A Time

Wed, Jul 09

3:50pm
4:00pm
4:10pm

Comments

Is there anything specific you would like to discuss?

Comments...

You will be sent an email reminder to the morning of your appointment.

How to Find Tutoring Reports

Faculty have access to reports of their students' tutoring visits to the Writing and Learning Commons (WaLC). For reports of students' visits to the Math Tutoring Center (MTC), please contact the MTC Director (828-227-3830).

To generate a report for your entire class:

1. On the left-hand menu, click on Reporting.
2. Under **Tutor Reports**, click on Tutor Appointment Details.
3. Change the date range.
4. Under **Course Data**, choose your course and section (you can only search one section at a time).
5. Click **Search**.
6. Under Actions, click on Export to Excel.
7. Click on the link to the Download Center to access your report (you can also access the Download Center from your Home page under Quick Links).
8. Please note that these reports include:
 - a. Cancelled appointments (listed in the **Reported duration** column).
 - b. No Shows (marked in the **Is no show** column).
 - c. Reported session durations (see note below under "Limitations of tutor reports in GradesFirst").
 - d. Tutors' notes under the Summary column.
9. For assistance with tutor reports, please call the Writing and Learning Commons at 828-227-2274.

Tutor Appointment Details Report

The screenshot shows a search interface for tutor appointment details. At the top, there are two status indicators: 'Standard User Type: student' and 'Registered In: ENGL-202 Writing and Critical Inquiry (60)'. Below these are 'Search' and 'Modify Search' buttons. A dropdown menu labeled 'Actions' is open, showing options: 'TUTOR NAME', 'TUTOR EXTERNAL', 'STUDENT NAME', 'STUDENT EXTERNAL', and 'APPOINT'. There are also three checkboxes: 'TUTOR NAME', 'TUTOR EXTERNAL', and 'STUDENT EXTERNAL'.

Tutor Appointment Details Report

The screenshot shows a detailed search interface for tutor appointment details. It includes fields for 'Keywords (First Name, Last Name, E-mail, Student ID)' and 'Enrollment Status' (set to 'No Preference'). It has date selection fields for 'Begin Date' (07/05/2016) and 'End Date' (08/03/2016). There are dropdown menus for 'Tutoring Team' (set to 'All') and 'Tutor for Appointment' (set to 'All'). Below these are sections for 'Student Information' (First Name, Last Name, Student ID, Tag, Watch List), 'Area of Study' (College/School, Degree, Concentration, Major), 'Performance Data' (GPA, Hours, Credits), 'Summer 2016 Data' (Classification, Term GPA), and 'Course Data' (Course, Section, Status). The 'Course' field contains 'ENGL-202 Writing and Critical Inquiry'. The 'Section' field contains '60'. The 'Status' field is set to 'Registered'. At the bottom, there is a 'Search' button and three checkboxes: 'My Students Only', 'Include Inactive', and 'Ignore Term'.

How to Look Up Tutoring Visits - Individual Students

1. In the search bar, type in the student's name or 920#, then click on their name.
2. You can also click on an individual student's name in your class roster or advisee list.
3. Click on **Reports/Notes** in the tab menu.
4. Scroll down to **Tutor Reports**.
5. Click on "Details" to the right of each visit to read tutors' summary notes.

Tutor Reports

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	SUMMARY	
07/26/2016 11:30 AM	07/27/2016			Dylan came in with his fina...	Details

Limitations of Tutor Reports

1. Writing appointments do not automatically have courses assigned, so your student's writing appointments will only show up on tutor reports if the tutor assigns a specific class while writing their summary report. If you suspect that a student has gone to a writing tutor, but they are not listed in the class report, search for the student individually to see all of his/her tutoring visits (see above).
2. All tutoring appointments are 30-minutes, so some students will have multiple appointments in one day. Make sure to look at the dates/times of each appointment to determine which sessions were actually one concurrent appointment.
3. Duration of appointments under the **Scheduled duration** column will always default to the appointment time (e.g. 11:00-11:30). Actual appointment durations reported by tutors (i.e. if the student left early or stayed late) will be listed under the **Reported duration** column but will not appear until the tutor has completed the report at the end of each week.

APPOINTMENT CREATED AT	BEGIN DATE TIME	END DATE TIME	SCHEDULED DURATION	LOCATION	ARRIVED AT	DEPARTED AT	REPORTED DURATION
07/22/2016 01:56 PM	07/25/2016 02:00 PM	07/25/2016 02:30 PM	30min	Writing and Learning Commons, Belk 207	07/25/2016 02:05 PM	07/25/2016 02:30 PM	25min