Advisor Communication Training
(GradesFirst)
Our unified tool to help advisors connect with their advisees

Bucks County Community College
Newtown • Bristol • Perkasie • Online
Welcome to Advisor Communications (AKA GradesFirst) Training!

Topics covered today are:

1) Gaining access to Advisor Communications

2) Setting up your availability in the Advisor Communications Calendar

3) Creating a campaign and sending it to your advisees

4) Filing an advising report (documenting a connection)

5) Sending a campaign to students who haven’t responded yet

6) Help

7) Additional Cool Tools
Gaining Access to Advisor Communications

To get to the tool login to MyBucks

Then click on the Advisors Communication icon

Or you can type in https://bucks.gradesfirst.com/session/new
this will take you to the home page.

Once you are logged in the first step is to create “My Availability”
GradesFirst - Setting up Availability for Advising

The GradesFirst tool is here to simplify your advising duties and easily create schedules that your advisees will use to sign up. Follow this tutorial to create your schedule of availability for advising.

1. After logging into GradesFirst, click the **My Availability** tab.

2. Click the **Actions** drop down menu and click **Add Time**.
3. The Add Availability window will appear. You will need to specify the dates, times, semester, location, and services offered. If you wish to add more times, you can repeat this process again (see Step 7).
   A. Click the dates when you want to schedule advising appointments.
   B. Use the slider to block off time.
   C. Select the Campaigns option.
   D. Select the Duration. This would be created from your campaign.
   E. Select your Location. You can choose Faculty Advisor’s Office or Upper or Lower Bucks Campus.
   F. You will want to add the Advising option by default. Add any additional services.
   G. Add additional Details about your office number, directions, or anything you want your advisee to be aware of before the appointment.

4. When you are finished adding the details, click the Save button at the bottom.
5. After the entry has been added, you can modify the time at any point by clicking **Edit**.

6. Make any changes necessary to the time and click **Save**.
7. If you wish to add additional times, select the entry, click the Actions drop down and click **Copy Time**.

8. This will launch the Copy and Add Availability window where you can add an additional time. **Note**: You may need to select the semester again. Click **Save** when completed.
GradesFirst - Creating a Campaign for Scheduling Student Advising

Once you have created your availability in GradesFirst, the next step is to create a campaign for your advisees. This will generate an email with a sign up page based on your availability that your advisees will use to sign up for an advising session.

1. After logging into GradesFirst, click **Appointment Campaigns** in the upper right corner.

2. Click **Appointment Campaign** again.
3. Enter the details for your advising campaign.
   A. Type a unique name for the **Campaign Name**.
   B. Choose the beginning and ending dates for the advising period.
   C. Set the **Appointment Length**. 60 minutes is recommended.
   D. Leave **Slots Per Time** and **Appointment Limit** as 1.
   E. Change the **Course or Reason** to Advising.
   F. Set the **Location** to Faculty Advisor’s Office.

4. When all details have been entered, click the **Continue** button.

5. Under the Assigned To category, select **My Students Only** and click the **Search** button.
6. A list of your assigned advisees will appear. Click the button at the top of the list to select all students. Click the **Continue** button.

7. The list of students will appear again for review. Click the **Continue** button to proceed.
8. Place a checkmark next to your name and click the **Continue** button.

![Spring 2016 Advising](image)

9. An email template will display. You will want to include a **Subject** and **Instructions or Notes**. The student’s information and campaign link will automatically be added to the email.

![Compose Your Message](image)

10. An **Email Preview** (left) and campaign link **Landing Page Preview** (right) will display at the bottom of the page. Click the **Continue** button to proceed.
11. You can review the details on the Confirm & Send page. Be sure to check the **SMS Reminders** (text messaging) reminders option as students are more likely to respond to these types of messages. Students will be able to opt out of SMS messages if they would prefer not to receive them. If you are satisfied with the settings, click the **Send** button.

12. You will be prompted again to confirm the invitations. Click **Send Invitations Now**.
13. Below is a sample email that students will receive in their inbox. Your students will click the link “Schedule Advising Appointment” to get started.

**Please schedule your advising appointment.**

**Hello John**

You have been requested, by your advisor, to schedule an appointment with them. By clicking the link provided, you can simply select a time that works with your schedule, save it, and an appointment will be created for you.

**Note from Advisor:**
Students will need to use the link provided

**Schedule Advising Appointment**

You can also copy and paste this address into your web browser:
https://bucks-training.gradesfirst.com/va/STY1JDOnTT
Filing an advising report (documenting a connection)

Though you will still be documenting communications to your advisees in the Student Planning Module, you will want to keep track of who you have met with already in GradesFirst. When a student creates an appointment using campaign the tool automatically starts the report.

When a student schedules an appointment you will see it on your home page.

To start a report, click on the checkbox first of the appointment and then Actions, hover down to Add Advising Report. A new dialog box will appear.

Basically all you want to do is document that you met with the person, so when you send out campaign reminders you will not be sending them to people whom you have met with.
So just click on the reason for the appointment, and whether they showed up and save it.

To see how this information will be used we will go back to Campaigns.

Here you will see a general overview of the campaign. Click on the campaign you want to review.

Now you easily see whom you have met with.
Resending a campaign to advisees who have not scheduled yet.
When you log in you are at the home page. Start by clicking on the icon that looks like a chart. That is how you get to Campaigns.

Here you see a quick overview of how the campaign is going.

To get more details click on the title of the campaign. In this case it is “Faculty Advising for the Spring Semester” yours will be whatever you called your campaign.
Now we see the students that have made appointments. You also see the next tab over is “Appointments Not Yet Made”. So click on that tab. First, we need to select everyone I want to resent it to. Clicking the top box selects them all.

In the grey bar, you see the word “actions” by clicking on that you will see “Resend Appointment Request”.

This dialog box appears, and hit resend.
Help Resources

Three ways we can support your use of this Advising Communications (Grades First) tool:

1) Start with Helpdesk staff at 215-968-8191 or Helpdesk@bucks.edu for things like log in and use of the technology.

2) Information in this training packet will be updated as we evolve into using this tool and discover additional best practices. Please see the Lib Guide for the most up to date version of this tool.

http://bucks.libguides.com/HelpDeskFacultyStaff/GradesFirst
Follow this tutorial to connect your GradesFirst advising appointments with your Outlook calendar and your Outlook calendar with GradesFirst. Any entries you create in your Outlook calendar will automatically be added to your GradesFirst calendar and vice versa. **Note:** if you have previously connected Outlook to GradesFirst, you will want to refer to page 3 of this document to remove those steps.

1. After logging into GradesFirst, click the **Calendar** option on the left navigation panel.

2. Click the **Subscriptions** option.

3. Click **Setup Exchange Calendar Integration**.
4. Click the **Connect with Exchange** button.

5. The synchronization should now take place; you’ll see a Syncing icon while this happens. After a few moments, you should see an Enabled message along with the date and time it was synced.

6. Return to your GradesFirst calendar. Any entries in your Outlook calendar will show up as Free/Busy in GradesFirst. Appointments created in GradesFirst will automatically populate on your Outlook calendar.
Removing previous Outlook Integration from GradesFirst:

1. Return to your Outlook calendars. You should see the GradesFirst calendar in the “Other Calendars” section. It might be called GradesFirst or Untitled if you have not renamed it. Right click on the GradesFirst calendar and choose **Delete Calendar**.

2. Click **Yes** to confirm the deletion of the calendar.