Introduction

Welcome to OSU’s STAR System, a program by GradesFirst, which allows you to connect with your advisees, professors, and other advisors. The system is designed to help advisors more effectively succeed on student retention and communication and help maximize your advising efficiency. This 100% web-based system includes features such as: enhanced early alerts, progress reporting, advising center management, tutor management, appointment scheduling, a communication center, assignment tracking, and robust reporting among other great features.

The scope of this document is to provide you, the advisor, with a source of information that will help you understand and utilize the STAR System on a daily basis in conjunction with other programs such as SIS. GradesFirst is a very flexible application, and this document will instruct you on the basics of the system. However, keep in mind that these instructions may not cover every possible aspect of the program.

Accessing the System

To log into the STAR System, visit http://star.okstate.edu/ and click the link to log in. On the subsequent page, enter your O-Key username (email) and password.

Help

For assistance with resetting your O-Key username and password, visit the O-Key Account Services website or contact the OSU Helpdesk at 744-HELP. For assistance using the application itself, you can log a support ticket by emailing support@gradesfirst.com. This will create a support ticket, viewable by the GradesFirst staff. If you have a question concerning OSU’s implementation, please email starsystem@okstate.edu.
Home Tab
This is where you, the advisor, will be spending the majority of your time. From the Home Tab advisors can do a wide variety of tasks. This is the default page that appears each time an advisor logs into the system. The students who appear in the list under the “My Assigned Students” sub-tab are those students currently enrolled in that semester who have you listed as an advisor in SIS. If a student is enrolled but does not appear on your list, first make sure that he is assigned to you in SIS (check ADV or 119 screens). If you are not listed as the advisor but should be, contact your department personnel in charge of updating advising assignments. Note that any changes made in SIS take 24 hours to apply in the STAR System, but you can still search for the student by visiting the Search Tab.

My Assigned Students sub-tab. By default this sub-tab shows all students who have been assigned to you as the Advisor whenever you log into the system. From this view you may click on the student name (which is actually a link) to access that student’s profile page. You can also view all the Categories (SIS-defined data groups) to which the student belongs. You may ignore the “At-Risk” column as OSU does not have an official “At Risk” designation, so this field will say “No” for every OSU student.
**Core Advisor Options.** This command bar on the “My Assigned Students” sub-tab contains key functionality that advisors will use on a daily basis.

a) **Send Message** - Gives advisors the ability to send an e-mail message to the selected student(s). Additional (non-advisees) can also be included in the message.

b) **Schedule Appointment** - Allows an advisor to create an appointment for the selected student(s). When selecting this option, the system automatically adds you and the student as attendees to the appointment. The default selection is a “General” appointment and will allow the advisor to select a date and time. If the appointment is to be an advising appointment, when you change the type the system will ask you to select the advisor and will present the selected advisor’s available times. Select yourself if you will be the advisor. This setup allows you to schedule appointments for students with other advisors as well as with you. If you are advisor located in one of the advising centers on campus, you may leave the “Location:” field blank. However, if you are a faculty or other advisor not located in a center, enter your office building and room number in the Location field.

c) **Advising Report** – Allows for the creation of an advising report for a student. Use this button to file an advising report summarizing what was covered during a student walk-in visit. A blank advising report is **automatically generated** whenever an appointment is scheduled. Please complete all appropriate fields in the report, and remember: **ADVISING REPORTS ARE VIEWABLE BY ALL ADVISORS!** Save any private information in a Note!
d) **Tag** – Consider a “Tag” as a unique way of grouping students. You may then search, sort, and print reports for all students “tagged” with a particular Tag. Since ALL advisors at OSU will be able to view, apply, and search by ALL tags, we will be monitoring/coordinating Tag creation. All Tags should be submitted to an Advisor Administrator for approval to assure appropriate naming of the Tag. To add a Tag to your students, simply select the students, click the Tag button, enter the name of the Tag, and click “Save.” **Be sure to spell correctly to apply the correct Tag!** If you need to “Mass Tag” a large group, contact your Advisor Administrator for assistance.

To view your particular students assigned to a particular Tag, click the “Filter By Tags” option (above the “Send Message” button) and then choose which Tag you wish to view. Click the “Clear Filters” link to remove the Tag filter. Click the “Hide Tags” link to hide the Tag list.

e) **Note** – This button allows an advisor to create a text entry and/or attach a file that to a student’s profile. Notes are different from advisor reports in that notes are not linked to an advisor visit/appointment. Notes are for special commentary and/or electronic files that may be added at any time and for any purpose. **Notes are not Term-specific and can be made private (so no other advisor can read them) or made viewable by the students.** Advisors are responsible for making sure the appropriate choice is selected for privacy settings (the default is viewable by all advisors) and for making a note viewable for students (the default is not viewable). See the screenshot below for more details on notes.

![Screenshot of STAR System 4](image)

f) **Mass Print** – This button allows an advisor to mass print his/her advisee’s Student Development Reports and Calendars.
Upcoming Appointments sub-tab. Need to see a list of all of your upcoming appointments? This tab is for you. From here you may also contact (via the Send Message button) a student if correspondence is needed. The screen will show you the next 15 upcoming appointments before screen pagination begins at the bottom. From this page you can also view your “Recent Advisor Appointments” and “Recent Reports You’ve Created” as you can from the “My Assigned Students” sub-tab.

My Availability sub-tab. The “My Availability” sub-tab enables an advisor to setup his/her available “office hours” during which appointments may be made with them by students, front desk personnel, or even other advisors. To define your “Times Available” for advising appointments, simply click the “Add Time” button and choose the times (using the sliding bar) and days (using the checkboxes) you can meet each week. Please note that you can add as many “Times Available” entries as you would like. So, for example, if you are not available during a lunch hour from 12:00p – 1:00p you can create one entry from 8:00a – 12:00p and a second entry from 1:00p – 5:00p.

The “Edit Appointment Constraints” Link also on this sub-tab is where you can set how many hours in advance that students must schedule their appointments and where you can set your default appointment length. See the screenshot below for details.
Advising Center sub-tab. The Advising Center tab was created to work with the Advisor Center Kiosk/Front-Desk check-in functionality. Advisors located in an OSU advising center can use this tab to monitor incoming students. The system will track the following students:

a) Students who have arrived for their scheduled appointments waiting to meet with you, their advisor.

b) Walk-in students who are waiting to meet with a particular advisor (including you).

c) Walk-in students who are waiting to meet with the first available advisor.

d) Students who have arrived for their scheduled appointments waiting to meet with another advisor.
Options Box. This box on the right side of your Home Tab screen displays features that are considered non-daily activities. From here advisors can do the following:

a) **My Conversations** – this is another link to your “Conversations” Tab (described below).

b) **School Information** – this link will redirect you to a page displaying any important information relevant to OSU’s system implementation. General OSU announcements related to the system will appear here.

c) **Download Center for Reports** – this link will redirect you to a page displaying the Report files you have requested to be generated (for printing) from the Reports Tab (described below). Longer reports may take some time before they appear here. Reports will also generally come in two files types, Microsoft Excel (.xls) or Comma Separated Values (.csv). Both can be opened using Microsoft Excel.

Upcoming Appointments Box(es). This box on the bottom left of your screen will list your next five (5) upcoming appointments that have been scheduled within the system.

Advisor Reporting. This section at the bottom of the Home tab contains your most recent advising appointments and also advising reports that you have created and/or need to complete.

a) **Recent Advisor Appointments sub-tab.** This sub-tab will display recent (or past) advising appointments that you have conducted. As your list of appointments grows, the pagination system at the bottom will let you see ALL advisor appointments you have ever created. The two buttons in this section allow you to add/complete an advising report (“Add Report”) for a particular appointment or to indicate if a student failed to attend a scheduled appointment (“Mark No-Show”).

b) **Recent Reports You Created sub-tab.** When you create an advising report (say for a walk-in appointment), one place it will be visible is on this tab. Similar to the Recent Advisor Appointments tab, this tab will display all advisor reports you have ever created via the pagination system.
Calendar Tab
The Calendar tab is where an advisor can view all of his/her “events.” Appointments or other events that may appear on the calendar include advising appointments tutoring appointments, general appointments, "Free/Busy" time (from Outlook), and courses taught. If you are viewing a student’s calendar, you will see similar events belonging to that particular student. This page will allow you to see your appointments in a number of different views (List, month, week, or day) as well as set up integration with your Outlook or other .iCal-capable device. You can also drag-and-drop appointments to move them from one day to another.

Conversations Tab
This tab is where you can view (and search for) the email “conversations” you have had with students and other users within the system. You can read and reply to responses from within the system. Replies to these messages will be directed to your OSU email address so you never need worry about missing a student’s response.
Reports Tab

The system comes with many predefined reports providing a range of specific data. The system returns results using the same search engine as the Search Tab (described below), so very specific, custom searches are possible. Search results appear on the screen, but all reports "print" to Excel. In essence, when you click a "Print Report" button, the system will export that report to Excel and will save a copy in the “Download Center for Reports.” Creating an Excel file gives you a gamut of formatting options you can use before printing. The list of predefined reports is described below. Custom reports may also be available. Contact your OSU STAR System Coordinator for more information.

1. Progress Reports. Need to find out how professors evaluated students during an Early Alert/Progress Report campaign? These are your reports. Each report is described below.

   a. Student Progress Reports and Detailed Student Progress Reports. The Student Progress Report, as displayed below, provides an overview of selected students’ progress reports that were submitted within the date range you specify. This report will show all students that meet your report criteria. The Detailed Student Progress Report functions the same way, only it returns even more data fields to provide you with more information about the students in question and the report submitted by the professor.
b. **Students Flagged At-Risk or Critical and Detailed Students Flagged At-Risk or Critical.** The Students Flagged At-Risk or Critical report enables users to limit their search to ONLY Early Alert/progress reports where students were marked as At-Risk to Fail by the professor who submitted the report. Like the other Detailed Reports, The Detailed Students Flagged At-Risk or Critical report returns even more data fields to provide you with more information about the students in question and the report submitted by the professor.

<table>
<thead>
<tr>
<th>Student Progress Reports Flagged At-Risk And/Or Critical</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Ben Ivan</td>
</tr>
<tr>
<td>Troy Will</td>
</tr>
<tr>
<td>Augustine Ando</td>
</tr>
</tbody>
</table>

c. **At-Risk Progress Reports And Tutor Appointment.** This report shows a list of students who have been reported At-Risk in a course and any tutor appointments that have been reported for that course. This report shows if students who are marked At-Risk are being served effectively by tutor appointments. Also, by including Dropped Dates, Tutor Appointment Dates, and Grades, the report can help reveal the effectiveness of those actions.

d. **Progress Report Requests.** This report shows a list of all Early Alert/Progress Report Campaign Requests that have been submitted directly to professors by the STAR System. Note that most Early Alert requests may not be sent to faculty using this system, so there may be no reports of this type to view.

2. **Student Information Reports.** These reports provide basic information on currently active (enrolled) students. Basic student data (from both SIS and the STAR System) is returned. Each report is described below.

a. **Students Active for Term.** This report provides basic data on students who are currently active (enrolled) for the particular term. Information that is returned in this report is customizable, including such fields as names, addresses, enrolled/dropped courses, email, cell phone, credit hours, majors, GPA, race, categories, and more.

b. **Students with/without Advisors.** This report returns a list of students along with their assigned advisors. Each student is listed for each advisor. If a student has multiple advisors, there will be an entry for the student for each advisor, which allows for easier processing in Excel.

c. **Students with Courses.** This report gives a summary for each student's courses this term. Due to the size of the report, the report may take a long time to generate. You might consider filtering your search to return smaller groups. Using this report in Excel, you can weight absences, at-risk evaluations, tutor requests, and tutor appointments.

d. **Students By Category and Course.** This report combines student course data along with category data so that you may sort and compare students in certain categories with their enrollment data. One entry for each course enrollment will be returned (thus a student will appear multiple times if he/she is enrolled in multiple courses).

e. **Notes.** This report will allow you to pull a report containing all of the (non-private) Notes written and included in a student(s) profile. This report provides an easy way to preview all of the Notes written on a student or group of students as well as a means to edit those Notes directly from the search results.
3. **Advisor & Summary Reports.** These reports provide the user with both summary and detailed information about Advisor appointments and the data/statistics collected from completed advisor reports. Each report is described below.

   a. **Advisor Appointments and Advisor Appointment Details.** The Advisor Appointments report allows a user to search for advisor appointments that have been conducted during a selected period of time. The report displays information about the appointments including dates, attendees, reasons, duration, reported duration, location, comments, and whether or not a report has been filed. The Advisor Appointment Details is a similar report that includes even more details including information on No-Shows, appointment types, and summaries of the reports. These reports provide a convenient way to review advisors reports and to see if any reports have not yet been filed for a particular appointment.

   b. **Advisor Reason Totals.** This report provides a list of advisor appointments sorted based on the selected “Reason” for the appointment. The report is tailored to allow provide statistics connected to the reasons selected for appointments as well as appointment durations. This report can also be filtered based on the facility where the appointments occurred.

   c. **Daily Advisor Appointments.** This report provides a list of scheduled and walk-in appointments for a selected period of time. This report will return lists of upcoming scheduled appointments as well as lists of appointments that have already occurred. The report includes information on the appointments themselves as well as on the advisors and students attending the scheduled appointments.

   d. **Advisor No-Shows.** This report provides a list of appointments for a selected period of time to which students were marked as No-Shows. This report provides the easiest means for an advisor to determine all of the students who have missed an appointment with him/her as well as to gather a total number of missed appointments by a particular student.

   e. **Advisor Stats.** This report provides a list of the appointment statistics for advisors including Student Count, Appointment Count, Appointment Attendee Count, Evaluation Count, Attended Count, No Show Count, Scheduled, Walk-In, Logged Time, and Calendar Time.

4. **Absence & Enrollment Reports.** This section contains reports related to current semester enrollment (Absence reports are unavailable as OSU does not track attendance through the STAR System. Please note that these reports can be quite large and make take some time generating if few filters are used. The available reports are described below.

   a. **Dropped Classes.** This report provides a list of those students have dropped courses this semester within a specific date range. Advisors can also message and tag students directly from this report.

   b. **Non-Campaign Enrollment Census Report.** This report provides current enrollment information on student including the enrollment status, last dates of attendance, drop information, and course and professor information.
Search Tab
The Search tab offers users a great way to search for a specific group of users (e.g. students, professors, advisors) and then optionally perform some action for them. When searching for students, an advanced search function allows you to target very specific populations of students. For instance, it is possible to get a list of all Accounting Majors with less than a 2.0 cumulative Grad/Ret GPA and send them an email. You may also use this functionality to access a student’s profile page.

1. Simple vs. Advanced Search. You can toggle between the Simple and Advanced search by clicking the “Switch to” link. When you first click on the Search tab, GradesFirst defaults to the Simple Search. With the Simple Search, you have the option to search by Keyword, which includes names (or a group of characters in a name) CWID, classification, and/or category. When searching by name, the best results occur when you search using the First name Last name format (Tip: Avoid the Last, First format as students do not have commas in their names).

The Advanced Search, as shown above, gives users a chance to search for a wide variety of other options such as First Name, Last Name, Cum. GPA less than, and many more. Note that you can select multiple options within boxes that have multiple entries (for example, multiple Categories within the Category box. Press and hold your “Shift” key to select multiple options listed in a row, or press and hold the “Control” key to select options one at a time that are not listed one after another. Please note that selecting multiple options within the same box is cumulative, while selecting multiple options across multiple boxes is reductive. For example, if you select two categories (two options within the same box), say “Baseball” and “Academic Notice” and click search, you will return all students who are baseball players AND all students who are on academic notice (it will NOT return only baseball players on academic notice!). On the other hand, if you select a category and a major (two options located in different boxes), say football and agribusiness, you will return only a list only consisting of football players who are majoring in agribusiness.

2. Checkboxes. When you search for students, you have an additional option in which to further narrow your search results. The first checkbox enables you to search only for “My Students Only” (those actually assigned to you as their advisor). The second checkbox, “At-Risk Students Only” should not be used as no OSU students will ever be labeled as
“At-Risk.” The third checkbox, “Include Inactive” will also search for inactive students who are not currently enrolled in that particular semester.

3. **Action Buttons.** After you have searched for a group of students, you then have the power to perform the same functions on the list as you can from your Home Tab, including sending them a message, completing an advising report, scheduling an appointment, tagging them, or printing their calendars or reports.

**Notification Bar**

Located at the bottom right hand of your screen, the Notification Bar provides you with a quick and easy way to access important notifications occurring within the system including conversation messages, your Advising Queue (if you are located in an Advising Center), and system announcements. It also contains a live chat/email function to submit questions directly to GradesFirst personnel concerning any issue using the system.

Clicking the image of an envelope will display a list of any unread email conversations you have waiting (messages sent to you from other users). When a message is waiting, a red number will appear over the envelope indicating how many messages are waiting to be read.

Clicking the image of the two students will display your advising queue (if you are an advisor located in one of OSU’s advising centers). When one or more students are waiting, a red number will appear over the envelope indicating how many are waiting. The names of students who have checked in for a scheduled appointment or walk-ins who have asked to join your queue will appear in this list, along with a display showing how long they have been waiting. You can also click to start an appointment with a student from this bar.

Clicking the image of a megaphone will display any system announcements. These announcements may be from OSU’s STAR System Coordinator or they may come from the GradesFirst staff. Simply click the link to read the full announcement.
Clicking the “Need some help?” link will begin a chat session with GradesFirst personnel. Simply type your question into the box and click “Send.” Generally a live person is available who will respond to your chat within a few minutes, and responses will appear in the chat dialogue box itself. During peak/busy times all live personnel may be busy or unavailable, and so the system will ask for your name and email along with your question, and the staff will contact you directly at their earliest convenience.

You can also email their help support staff directly at support@gradesfirst.com. Please remember to only address GradesFirst program-specific questions to this help system. If you have a question or issue with something related to OSU’s implementation of the STAR System, please address it to the STAR System Coordinator at starsystem@okstate.edu or contact the ITLE Helpdesk at 405-744-1000.

**Appointment Cancellations – NEW!!!**

Advisors and students now have the ability to cancel previously-scheduled appointments and have the system track those cancellations (rather than simply deleting an appointment and having all record of it disappear). Whenever a user cancels an appointment using the system, all attendees (typically the advisor and the student) will receive an email informing them of the cancellation. The advisor’s calendar will display a record of the cancelled appointment, but the appointment time slot will immediately be opened for another student to schedule an appointment for that time should it be within the advisor’s open window of availability. As an advisor, to cancel an appointment, simply follow the steps listed below.

**Step 1:** Visit your “Calendar” tab and locate the appointment you would like to cancel (you can be in any view—month, week, or day), and click on the appointment. The new appointment modal (pictured below) will appear. In addition to cancelling the appointment, this screen will also allow you to edit the appointment and view and message the other attendees.

**Step 2:** Click on the “Cancel Appointment” button in the bottom left corner. This will reveal the “Cancel Appointment” window.
Step 3: Select the “Advisor Cancellation – Please Enter Message for Student Below:” option as the “Reason” and then enter the comments you would like the other attendees (typically, the student) to receive in the cancellation email. If this is a recurring appointment, you will also have the option to cancel all future appointments by checking the box that appears below your comments.

Step 4: Click “Mark as Cancelled” to complete the cancellation.
Step 5 (If needed): Once the appointment has been cancelled, you can choose to reschedule the appointment with the same organizer (you) and attendees (using the first link) or with a new organizer and the same attendees (using the second link). The first option creates a new appointment with you as the advisor, while the second allows you to select a different advisor. Note that only advisors see this option. Students will have to schedule a brand new appointment through the regular scheduling procedure.

Mark Attending on a Cancelled Appointment – NEW!!!

What can you do if you mistakenly cancel the wrong appointment or need to “un-cancel” an appointment? You can use the “Mark Attending” function of the Appointment Cancellation modal window to add the attendees back to the appointment. First, you will click the cancelled appointment from your Calendar tab. The appointment will now appear in purple and be marked as cancelled:

Clicking the appointment will reveal the appointment modal window. Simply click the down arrow next to the name of the other attendee(s) to reveal two options: “mark attending” and “message.” Click “mark attending” to re-add that attendee to the appointment.
Once you have clicked “mark attending,” the screen will revert back to the pre-canceled modal window, the appointment will no longer show as “Cancelled” on your Calendar Tab or your home page, and the attendee will receive an email confirming that he or she has been marked as attending the appointment.

**Viewing Cancellations – NEW!!!**

In addition to viewing cancelled appointments in purple on your Calendar Tab, cancelled appointments also are noted on your “Upcoming Appointments” sub-tab of your Home Tab.
Cancellation Reports – NEW!!!

Two new reports have been added as part of the Appointment Cancellation feature. These reports included “Cancelled Appointments” and “Cancelled Appointments Statistics.” Additionally, the following Advisor Reports have had cancellation information added to their columns of data: Advisor Appointments, Advisor Appointment Details, Daily Advisor Appointments, Advisor Stats, Advisor and Tutor Summaries, and Advisor and Tutor Summaries Detail.

a. **Cancelled Appointments.** The Cancelled Appointments report is a comprehensive report of all appointments (regardless of type) that have been cancelled within a given period of time. You can use the Advanced Search option to use the usual reporting filters; however, you also have the option to filter by the cancellation reason and/or location of the original appointment.

b. **Cancelled Appointments Statistics.** The Cancelled Appointments Statistics report provides a statistical review of why appointments are being cancelled. It will show OSU’s total number of appointments cancelled sorted by reason, providing the percentage figures under each reason. A date range is currently the only filter for this report, so a statistical summary by location or department is NOT available.