Introduction

Welcome to OSU’s STAR System, a program by GradesFirst, which allows advisors, professors, and students to connect. The system is designed to help advisors more effectively succeed on student retention and communication and help maximize their 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, advising center staff, with a source of information to understand and utilize the Advising Center Mode within the STAR System. GradesFirst is a very flexible application, and this document will instruct you on the basics of the Advising Center mode. However, keep in mind that these instructions may not cover every possible aspect of this module.

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.
Setup
For advisors and advising center unit staff who do lots of advisor appointment scheduling, the “Advising Center Mode” provides a simple and easy way to view the calendars of all advisors located within a particular advising center in order to easily schedule advising appointments. Access to this mode is an additional request that does not come with the standard advisor access level. If you are located within an advising center and would like to have access to the advising center mode, please have your advisor administrator contact the STAR System Coordinator for access, setup, and training.

Once you have been granted access to your center’s “Advising Center Mode,” when you log into the STAR System you will notice an additional link at the bottom of your screen. Below is a sample screenshot of the link.

When you click the “Advising Center Mode” link, you will be taken to the center setup page, where you can select your front desk location. Simply click on the button of your advising center, and you will be taken into its advising center mode.

Once in “advising center mode,” you will have access to view the calendars of all advisors set up in your advising center in order to schedule appointments for students with those advisors. This mode also is designed to check students in for scheduled appointments, add drop-in students to advisors waiting list queues, and help monitor those queues for advisors. Below are some sample screen shots of an advising center in advising center mode, followed by descriptions of/directions for the most common actions and tasks that can be completed using this mode.
Boxes, Buttons, & Links Explained

Advising Center Mode provides a number of ways to input and display information, and so users should be aware of the different boxes, buttons, and links available on the screen to ensure they are checking in students and creating appointments in the manner they desire. The list below is by no means an exhaustive list, but it is meant to provide an explanation of some of the major interactive areas on the advising center mode screen.

**Search For A Student box.** This search box at the top left of the screen is where a user must first search for and find a student before any other action can be taken successfully. This same box is used to search for ALL STUDENTS, whether they are students who need to schedule an appointment, students who already have a scheduled appointment and are checking in for that appointment, or students who are a “drop-ins” (see below for directions on checking students in or adding them to a “drop-in” queue). To search for a student, enter his/her CWID or name into this box and click on the correct name of the student when it appears. Using a CWID is the best means of locating the correct student as students with the same names may not be distinguishable within the list that returns. If you do enter a name, enter it in the format FIRSTNAME LASTNAME (DO NOT use Lastname, Firstname as the system will think a comma is part of the student’s name and will not return a result). Once you have selected the correct student his/her information will appear in a gray box below the Search for a Student box. If the student has a scheduled appointment for that day, a gray “Advising Appointment” box will also appear. This box will contain a “Checkin” button to check the student into the advisor’s queue and a “Cancel Appt” button to cancel the appointment if needed.

**Date and Time Range Selector and Reload Button.** The Date and Time Range Selector box allows you to select which day will appear on which you can schedule an appointment. The appointment availability area defaults to the current day, but you can click on the date to reveal a monthly calendar to select another day, and you can move backward or forward to other months by clicking the arrows to the left and right of the month. You must click the “Reload” button to then display the day you select. **PLEASE NOTE THAT THE APPOINTMENT AVAILABILITY AREA ONLY DISPLAYS ONE DAY AT A TIME** and no more, so if you need to look at multiple days, you will have to select them one at a time and “Reload” each one to see your advisors’ availability. The time range selector allows you to select which hours on a particular day will appear over which you can select an appointment. Adjusting this slider can be helpful in selecting appointment starting and stopping times. For example, if your slider starts on the hour (say 8:00a), available appointment times in the list will start from this time in the time increments you have selected (60min appointments will thus start at the beginning every hour). If you want to schedule an appointment for a particular increment (say 60min) to start at a different time (say on the half hour), you will need to adjust the slider so that it starts at that time (60min appointments starting on the half hour would need the slider set to start on a half hour, say 8:30a).

**First Available and Advisors Drop-In Queues Buttons.** Along the left side of the screen, the advisors located in your center will appear below an entry for “First Available” (which really means ALL advisors). Each box displays the current “drop-in” wait time for each advisor and a check box that can be clicked to adjust the Appointment Availability area to display only that advisor’s availability. After you select a student in the “Search For A Student” box, a “+ queue” button will appear to the right of all the advisors’ names, which is the drop-in queue button. If that student’s advisor is located in your center, his/her advisor will be moved to the top of the list of advisors. If a student is a drop-in, clicking the drop-in queue button next to a particular advisor’s name will add that student to that advisor’s queue (or to all advisors’ queues if the “First Available” button is clicked). Read below for more specific directions on this drop-in process.

**Time Increment Pull-Down Menu.** The time increment pull-down menu allows you to select the length of time for which you want an appointment to run. Please note that the system default is 30min, so you will need to adjust this for appointment times of a different length. Also, the choice you make here will override the default appointment length an advisor has set in his/her “My Availability” tab and make it for the increment you specify.

**Availabilities Enforced/Ignored link.** This link toggles between enforcing and ignoring the advisors’ established availabilities. Generally, you should always leave the link as “Availabilities Enforced” unless an advisor has specifically told you that he/she will be accepting appointments on a day/time that he/she is normally not available. Ignoring the availability will allow you to make an appointment during those times.
**One Click Create/Using Save Button link.** This link toggles between the “One Click Create” and “Using Save Button” options for saving an appointment. When “One Click Create” is displayed (default), selecting an available appointment time will open the “Create an Advisor Appointment” pop-up window to allow you to verify the appointment information and reason, add comments, and turn on or off the email appointment reminder. When “Using Save Button” is displayed, a “Save Appointment” button will appear at the bottom of the page and you will not be shown the verification window prior to making/saving the appointment.

**Advisor Waiting Lists sub-tab.** The default sub-tab in Advising Center Mode is the “Appointment” sub-tab, which contains the boxes/buttons/links described above. The “Advisor Waiting Lists” sub-tab reveals the advisors’ drop-in queues and the student(s) checked into them. See below for more information on this sub-tab.

### Checking In a Student for a Previously-Scheduled Appointment

Advising Center Mode is designed to make checking in a student for a previously-scheduled advising appointment quick and easy. When a student with a scheduled appointment arrives at the center, simply enter his/her CWID into the Student Search box and click on his/her name. That student’s information will appear, along with information about the appointment and a button to check the student in to the appointment (see below).

![Checking in a Student](image)

After you click the “Checkin” button, the check-in box will change to show that the student has been successfully checked in. You can also remove the student from being checked in if you made a mistake by clicking the “Remove” button.
Students who show up late for a scheduled appointment also still can be checked in, and their lateness will be recorded. Advisors may then have to fit these students in as if they were drop-in appointments.

Once a student has been checked in, his/her advisor will be notified with a pop-up “ding” notification and can view the student in both the “Advising Center” sub-tab and the “My Advising Queue” section of the Notification Bar. You will have completed the check-in process and thus can press the “X” button next to the student’s name in the search box to prepare for the next student who arrives.

Checking In a Student for a “Drop-In” Appointment (Adding a student to an Advising Queue)
Advising Center Mode also allows you to handle students who do not have a scheduled appointment but would like to see an advisor at his/her earliest convenience. Each advisor has a waiting list queue for drop-ins, and you can add any student to a particular advisor’s waiting list depending on your (or the student’s) advisor preference. Additionally, you can add a student to the “First Available” queue so that any advisor can opt to meet with the student (all advisors will be informed of the student’s check-in and can choose to start an appointment with that student—whichever advisor does so first will “win” the student and remove him/her from the “First Available” queue).

To add a student to a waiting list queue, simply search for and select the student, then click the “queue” button next to the preferred advisor (or of the “First Available” queue):
You must then select an “Appointment Reason” in the resulting pop-up box. Simply click on the blue link (or click the “Cancel” button or the close “X” if you have made a mistake in your selection):

The student will then be added to the advisor’s waiting list queue, and the advisor will be notified with a pop-up “ding” notification and can view the student in both the “Advising Center” sub-tab and the “My Advising Queue” section of the Notification Bar. Advising Center mode also allows you to view all of the students waiting for advisors by clicking on the “Advisor Waiting Lists” sub-tab. From this screen you can also remove students from waiting lists (if, say, a student decides to leave before an advisor can start and appointment with them), and you can prioritize the order of students to move a high priority student to the top of a particular advisor’s waiting list (see below).
Scheduling an Appointment

Advising Center Mode is designed to allow you to schedule appointments for advisors with relative ease. When a student contacts you and asks to make an appointment with an advisor, simply search for the student in the “Search For A Student” box and then select the student to bring up his/her student information. Next, if you know with which advisor the student is to meet, you may select the check box next to that advisor’s name (selecting only that advisor will speed up the availability search, as the more advisors you have selected, the more calendar data the system must sift through to determine available times). However, if you do not know which advisor to choose, or you want to look at all advisors’ availability, then you do not need to check the box next to one advisor’s name. Please note, however, that it may take more time to “Reload” all of their availability along with the student’s availability.

SCHEDULING AN APPOINTMENT CAN BE A SLOW PROCESS FOR SEVERAL REASONS, SO PLEASE BE PATIENT. THE SYSTEM IS DESIGNED TO COMPARE ADVISORS’ AND STUDENTS’ SCHEDULES TO INSURE APPOINTMENTS ARE NOT SCHEDULED WITH OTHER CONFLICTING EVENTS. THE FEWER ADVISORS YOU SELECT, THE FASTER THE SYSTEM CAN SEARCH, BUT YOU STILL MAY BECOME VERY FAMILIAR WITH THE “LOADING” DISPLAY:

PLEASE NOTE THAT YOU DO NOT HAVE TO WAIT FOR THE SYSTEM TO FINISH LOADING BEFORE YOU SELECT YOUR NEXT SEARCH OPTION(S). THE SYSTEM IS ROBUST ENOUGH TO LET YOU SELECT AN ADVISOR, SELECT ANOTHER DAY, AND ADJUST THE TIME SLIDER AND/OR THE TIME INCREMENT WHILE IT IS LOADING. YOU DO NOT HAVE TO WAIT FOR THE PAGE TO FINISH LOADING BEFORE CHOOSING ANY OF THESE OPTIONS!

Again, once the student (and advisor) has been selected, you can then click on the date box to select a date on which the appointment is to be scheduled. Then click the “Reload” button to load the availability for that day. For busy advisors, you may have to click on several days and wait for each day to load to see what appointments (if any) are available on particular days), and in those instances you will have to wait for each day to load. Regrettably, there is not a “multi-day” view as the advising center mode is designed to return the availability for multiple advisors at the same time, and viewing multiple advisors’ schedules across multiple days would return too much data (and would take even longer to display). However, should you like to view a particular advisor’s calendar across multiple days, you may be able to Quick Search for that advisor (if you have advisor-level access—advising center mode only users will not be able to do so) and view his/her calendar in detail. You can then return to the advising center mode or schedule the appointment following the directions for an advisor to schedule an appointment listed in the Advisor Guide.

Once you have selected the student, the advisor(s), and the correct day, please remember that you may need to adjust the time slider and/or the time increment pull-down menu in order to display appointments starting at the time you want them to start and running for the length of time that you desire. To reiterate, these adjustments can be made while the “Availability” section is “Loading”—YOU DO NOT HAVE TO WAIT FOR IT TO FINISH LOADING BEFORE YOU ADJUST THEM.

Once all appointment options have been selected, you may choose the appointment time by checking the appropriate box. Available times will contain a check box, while unavailable times will be blank or will contain the word “Details” if a previous event has been scheduled for that time (see below):
If “Using Save Button” is displayed (instead of the default “One Click Create”), a “Save Appointment” button will appear at the bottom left of the page (as pictured above) that you can click to save the appointment. You will then have successfully (and immediately) scheduled the appointment (however, you will not be able to verify all of the details or add any comments).

Typically, the default setting is “One Click Create” so that, when you click the check box, selecting an available appointment time will open the “Create an Advisor Appointment” pop-up window (see below) to allow you to verify the appointment information, add comments, select an appointment reason, and turn on or off the email appointment reminder. Once you have done so, you can click “Save Appointment” to schedule it, or “Cancel” (if you need to go back and make a change or not schedule the appointment).
Once the appointment has been scheduled, it is a good idea to click the “X” button after the student’s name in the “Search for Student” box to remove all of the entered student information and selected options.

**Managing a Previously Scheduled Appointment**

Advising Center Mode also allows a user to access the “Manage Appointment” window for appointments that have been previously scheduled. This window allows a user to check in a student for an appointment, cancel an appointment, delete an appointment, or edit an appointment. This window can be opened by clicking the “Details” link of the corresponding appointment in the advisor’s column: