

Administrative User Manual

GSTS

Developed by the Robert R. McCormick School of Engineering & Applied Science in partnership with
Northwestern University Information Technology and The Graduate School

Login with your NetID at gsts.northwestern.edu

For help, email gsts@northwestern.edu

Table of Contents:

Dashboard overview	3
Profile overview	4
Administrative notes	5
Milestones	6
Committee tab	7
Committee invitations	9
Plan of Study	11
Academic Progress	13
Research Project	15
Documents	16
TGS Forms	17
Administration	18
Plan of study set up	18
Academic progress setup	20
Degrees setup	20
Milestones setup	21
Updating milestones	22
Notifications configuration	25
Communications	32
Reporting	33

Dashboard

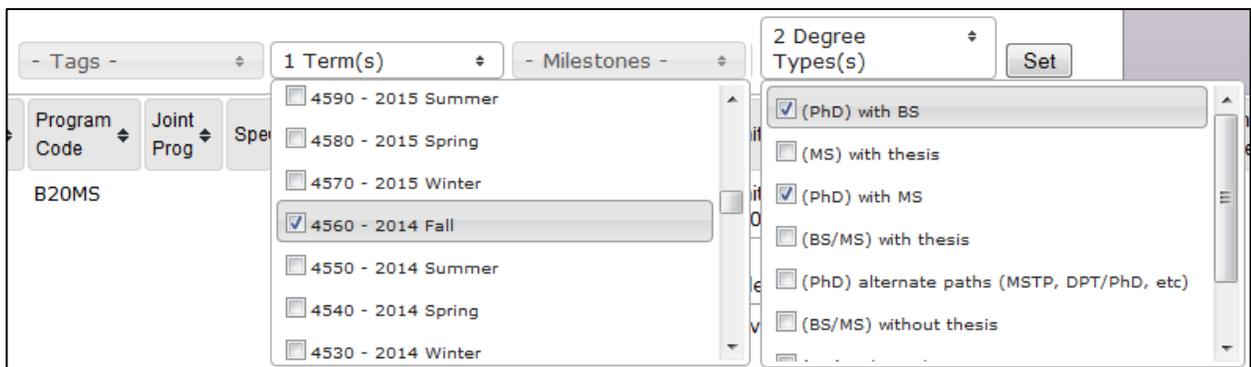
The GSTS dashboard provides an at-a-glance look at all the students in a given program. In addition to the **sortable columns** (click the column header to sort), the **filters** and **quick search** features can narrow the list to display a specific subset of students.

Filters



To display a specific subset of students on the dashboard, select options from one or more filter dropdowns (shown above), then click the **Set** button.

For example, to display only students who entered in Fall 2014 with PhDs, the following selections would be made:



Quick Search



The quick search tool (shown above) can be used to quickly retrieve a student or set of students from the dashboard list. As you type in the quick search box, the dashboard list gradually narrows to display only the student(s) who have a name or other data point matching what you've typed.

Profile

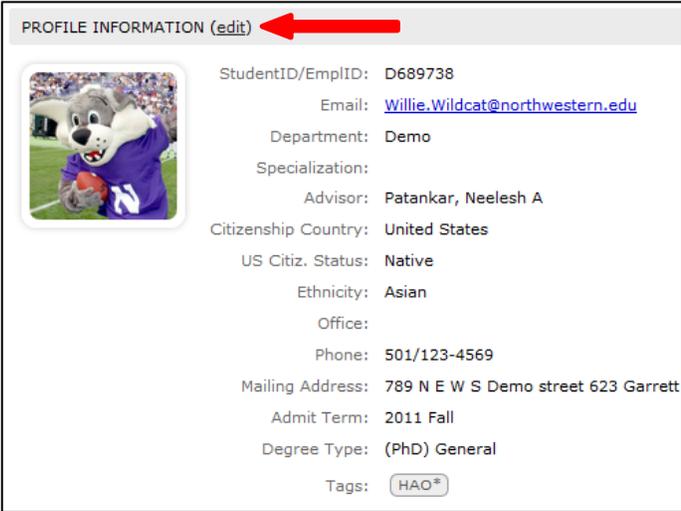
The student profile section displays individual student contact, demographic, and **milestone** information, as well as **administrative notes**.

The student profile section can be viewed by clicking the **SHOW PROFILE** button, located at the upper right of the Committee, Plan of Study, Academic Progress, and Research Project tabs.

Basic student information

Some of the basic information in the student profile comes from the student's official record in CAESAR and cannot be edited. However, the following fields can be edited by administrative users: Office, Mailing Address, Degree Type, and Tags.

To edit one of those fields, click the **"(edit)"** link at the upper left of the profile, make your changes in the pop-up window (shown below) and click **Save Changes**.



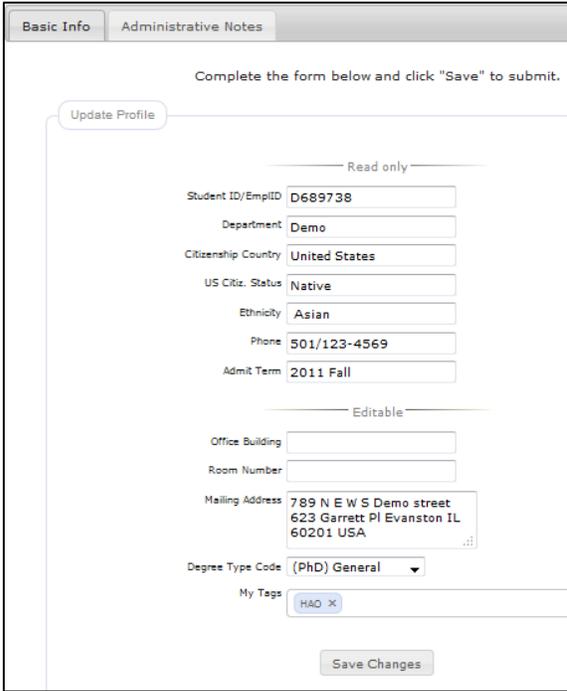
The screenshot shows the 'PROFILE INFORMATION (edit)' section. A red arrow points to the '(edit)' link. The profile information includes:

StudentID/EmplID:	D689738
Email:	Willie.Wildcat@northwestern.edu
Department:	Demo
Specialization:	
Advisor:	Patankar, Neelesh A
Citizenship Country:	United States
US Citiz. Status:	Native
Ethnicity:	Asian
Office:	
Phone:	501/123-4569
Mailing Address:	789 N E W S Demo street 623 Garrett
Admit Term:	2011 Fall
Degree Type:	(PhD) General
Tags:	HAO*

Notes:

Degree Type is the specific degree name specified by your program (e.g., "MS with Thesis," "MS without thesis," etc.), though all students' degree types initially default to PhD General or Master's General. For additional info on setting up these degree types, see **Degrees** under the **Administration** section of this manual.

Tags can be used to group or classify students and are a sortable and filterable field on the Dashboard. You can create new tags by typing them into the "My Tags" field. Tags can be seen by all GSTS programs, and you may see other programs' tags pop-up as you type in this field.

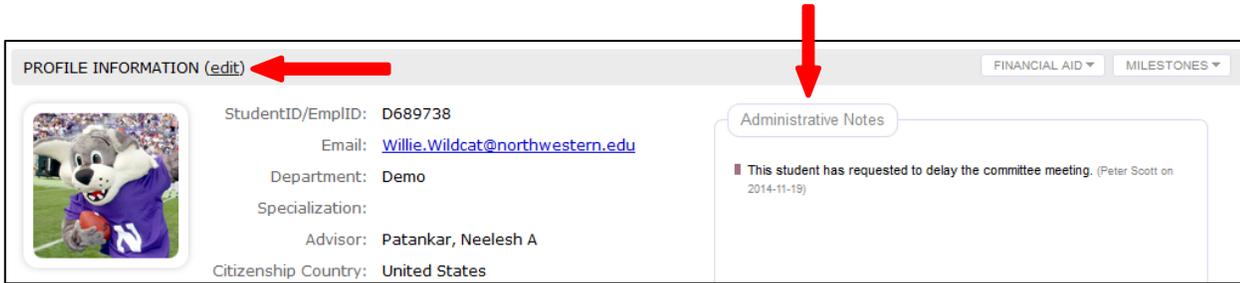


The 'Update Profile' pop-up window contains the following fields:

- Student ID/EmplID: D689738 (Read only)
- Department: Demo (Read only)
- Citizenship Country: United States (Read only)
- US Citiz. Status: Native (Read only)
- Ethnicity: Asian (Read only)
- Phone: 501/123-4569 (Read only)
- Admit Term: 2011 Fall (Read only)
- Office Building: (Editable)
- Room Number: (Editable)
- Mailing Address: 789 N E W S Demo street 623 Garrett Pl Evanston IL 60201 USA (Editable)
- Degree Type Code: (PhD) General (Dropdown menu)
- My Tags: HAO X (Text input)

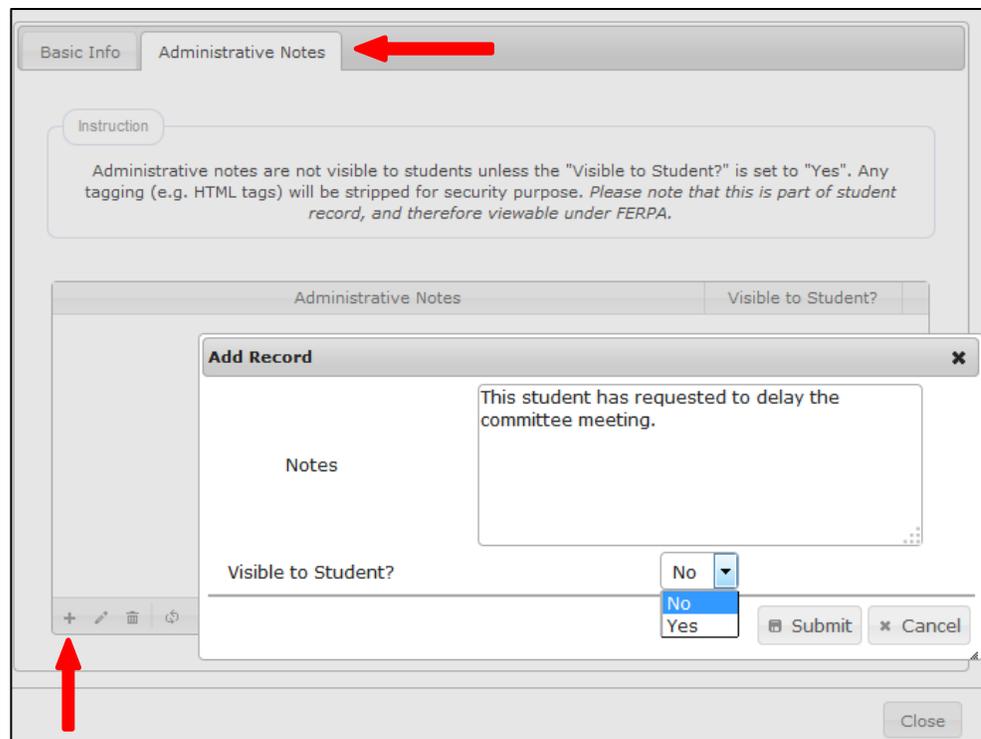
A 'Save Changes' button is located at the bottom right of the form.

Administrative Notes



Administrative notes can be added to a student’s profile by administrative users in your program and appear to the right of the basic profile information. The administrative notes section will only appear if one or more notes exist.

To add an administrative note, click the “(edit)” link at the upper left of the profile, click the Administrative Notes tab in the pop-up window, and click the + button. Enter your note in the text box that appears, choose in the dropdown if you want the note visible to the student, and then click the **Submit** button.



Note:

Administrative notes are not viewable by students from within GSTS unless you select “Yes” in the **Visible to Student** dropdown. *However*, all administrative notes are part of the official student record and are therefore viewable by the student upon request.

Milestones

PROFILE INFORMATION (edit) FINANCIAL AID MILESTONES

Milestones 4 Milestones Overdue

Milestone	Deadline	Status	Date Updated	Details	Type
TGS PhD Degree Completion	2020-08-31	Initiated	2011-09-30		TGS
TGS Prospectus	2014-08-25	Completed	2014-08-25		TGS
TGS Qualifying Exam	2014-08-25	Completed	2014-08-25		TGS
CITI/RCR	2012-09-20	Initiated	2014-11-14		
Proposal/Prospectus	2013-06-20	Initiated			
Versant	2011-12-20	Initiated			
TA Requirement	2014-03-20	Initiated	2014-11-19	TA for Mascotology 101	

View 1 - 7 of 7

Milestones information can be displayed by clicking the **MILESTONES** button at the upper right of a student's profile.

To edit the **Deadline**, **Status**, or **Details** of a milestone, click a row to select the milestone and then click the pencil icon. After making your changes, click the **Submit** button.

Notes:

TGS milestones (as listed in the Type column) are maintained CAESAR and cannot be edited in GSTS.

Non-TGS milestones are managed by your program. For additional info on setting up program milestones, see **Milestones** under the **Administration** section of this manual.

Edit Record

Deadline: 2009-09-22

Status: Completed

Details: PhD advisor is Todd Kuiken

Submit Cancel

Committee

The Committee tab is where a student’s principal research advisor and committee are identified.

Advisor

Principal Research Advisor

I have a principal research advisor.
No Yes

The **Principal Research Advisor** (also known as mentor, PI, dissertation director, advisor) is the Graduate Faculty member who works with the student to develop a research topic, formulate ideas and structure for, and guides the progress of the thesis/prospectus /dissertation. A student may have a **Principal Research Co-Advisor** who also works with the student to develop a research topic, formulate ideas and structure for, and guides the progress of the thesis/prospectus/ dissertation.

Faculty Name	Role
chin	
Luchins, Daniel J	d-luchins@northwestern.edu MED-Psych & Behavioral Science
Chang, Chin-Hung	chin-hung.chang@northwestern.edu WCAS Asian Languages & Culture

Accepted? 0 records to view

To add an advisor, start typing the faculty member’s name in the **Search faculty** field until you see his or her name. Click the name and then use the dropdown to indicate whether they will be the advisor or a co-advisor, then click the **Add** button.

Notes:

In order to add a faculty member, the “I have a principal research advisor” slider must be moved to **Yes** (otherwise the add faculty tool will not be visible).

Students and/or administrators can add a principal research advisor.

To edit an advisor’s role or email address, click the row to select the faculty member, then click the pencil icon located at the lower left of the add faculty tool.

Committee

To add a committee member, start typing the faculty member’s name in the **Search faculty** field until you see his or her name. Click the name and then use the dropdown to indicate their role (if applicable), then click the **Add** button.

Committee

I have formed a committee.
 No Yes **Yes** ←

The **Committee** has expertise in and informs the student's area of research, serves as reader of the thesis, prospectus, or dissertation, and determines the outcome of the proposal defense/final exam. A minimum of three individuals must serve on the committee. At least two members of this committee, including the chair, must be members of the [Northwestern University Graduate Faculty](#).

Northwestern Faculty chin

Faculty Name	Accepted?
Luchins, Daniel J d-luchins@northwestern.edu MED-Psych & Behavioral Science	?
Chang, Chin-Hung chin-hung.chang@northwestern.edu WCAS Asian Languages & Culture	?
Tolchinsky, Debra K debtolchinsky@northwestern.edu SoC Radio/Television/Film	?
Chin, Anthony C a-chin3@northwestern.edu MED-Surgery	?

Non-Northwestern Committee Member

Faculty Name

+

Comments (if any)

To add a committee member who is not a faculty member at Northwestern, use the **Non-Northwestern Committee Member** add faculty tool. Click the **+** button at the lower left of the tool, then fill in the person's identifying information and click the **Submit** button.

Any explanatory comments or notes can be recorded in the **Comments** text box. Any comments or changes typed in the box will be auto-saved.

Notes:

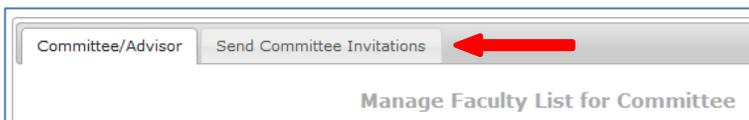
In order to add a committee members, **the "I have formed a committee" slider must be moved to Yes** (otherwise the add faculty tools will not be visible).

Students and/or administrators can add committee members.

To **edit an committee member's role or email address**, click the row to select the faculty member, then click the pencil icon located at the lower left of the add faculty tool.

Invitations

Invitations can be sent to faculty members for them to accept or decline membership on a committee.



don't see the invitations

tab and would like to turn it on, or if you would like to turn it off, please see **Communications** under the **Administration** section of this document.

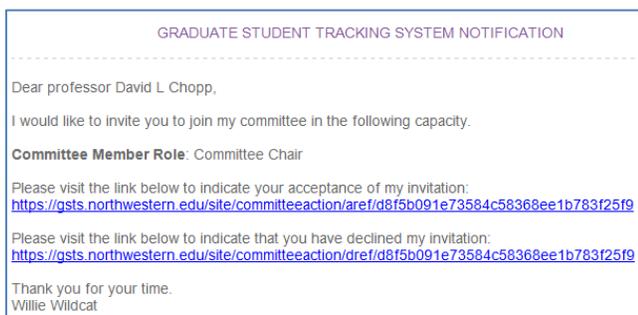
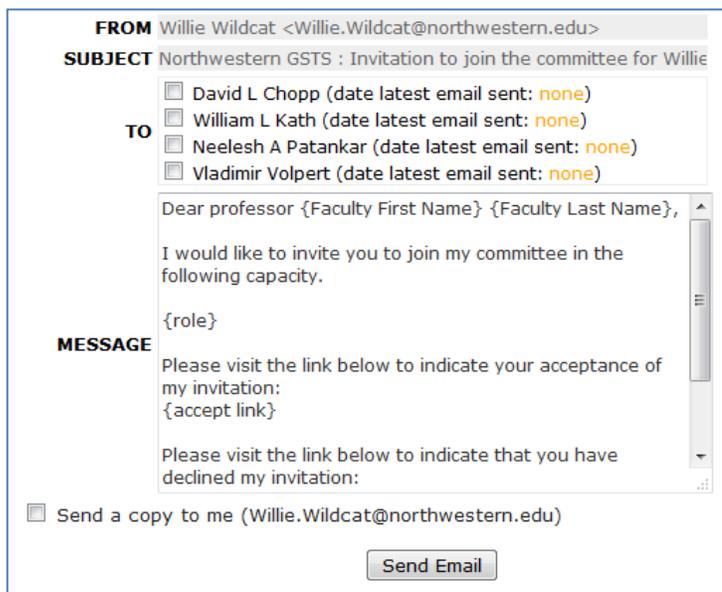
To send invitations, click the **Send Committee Invitations** tab. Check the boxes next to the faculty members you wish to invite, then click **Send Email**.

Notes:

While administrative users of GSTS may send invitations, **they are designed to be sent by students**. When faculty receives the invitation email, it will appear as being sent from the student.

The text of the invitation can be modified, but it is **important not to change any text that appears between the “{ }” brackets**, as this is where GSTS data such as names and hyperlinks will be merged into the message.

A date will be displayed in orange next to each faculty name if an invitation has previously been sent to that person. Once they respond, their name will disappear from the list.



Northwestern Faculty			
Faculty Name	Role	Invitation?	Accepted?
Hargrove,Levi J MED-Physical Med & Rehab l-hargrove@northwestern.edu			
Kuiken,Todd A MED-Physical Med & Rehab tkuiken@northwestern.edu	Chair		
Murray,Wendy M MCC Biomedical Engg p-scott@northwestern.edu		Yes 2014-10-09 10:26:44	Yes 2014-10-09 10:51:58
Perreault,Eric MCC Biomedical Engg p-scott@northwestern.edu		Yes 2014-10-09 11:09:53	No 2014-10-09 11:12:04

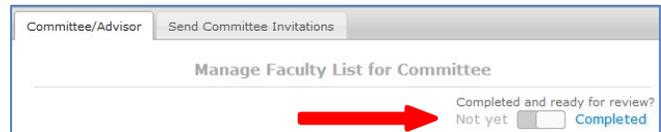
The invited faculty member(s) will receive an email instructing them to click the accept link or the decline link—no login will be required on their part.

Once a faculty member accepts or declines, their decision will display in the Committee tab.

Program Approval

Once all advisors and committee members have been identified in GSTS and confirmed, the student (or administrative user in some cases)

should move the **Completed and ready for review?** slider to **Completed**. This indicates to the program that the student's committee is ready for review.

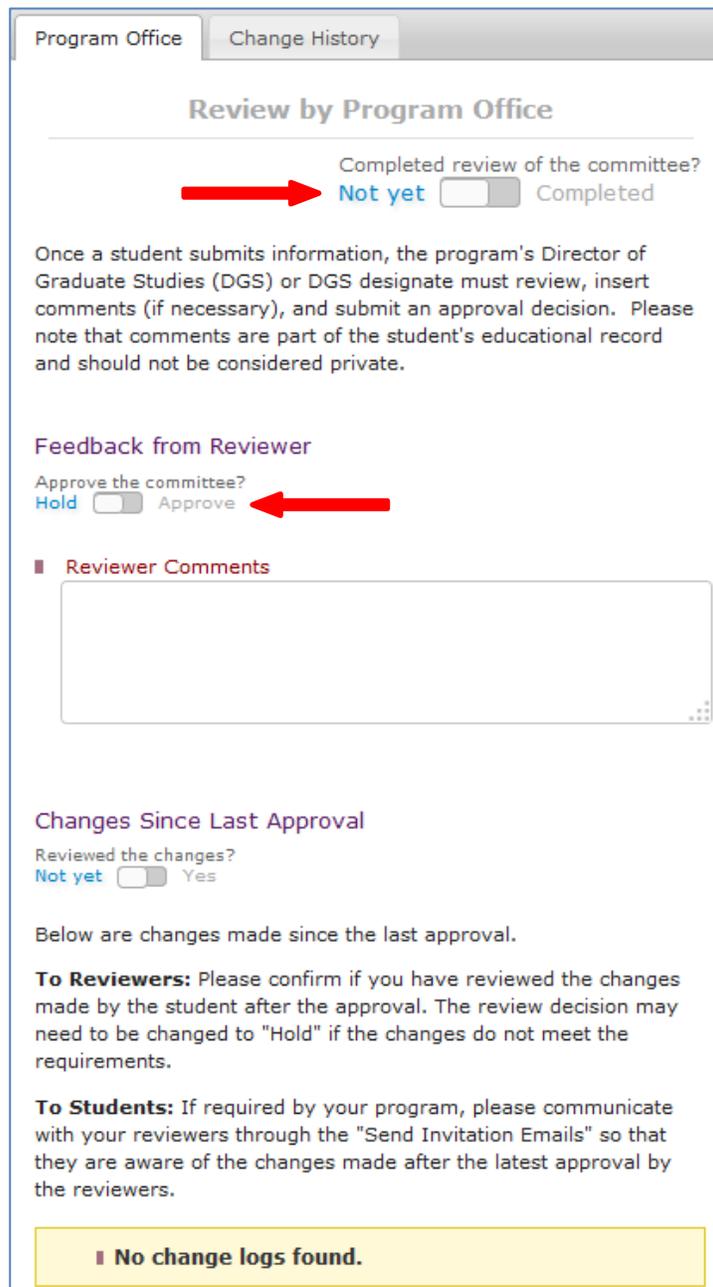


Once a student's committee is marked complete, the appropriate person in program can review (adding comments, if needed) and approve the committee by moving the **Approve the committee?** slider to **Approve**. Then the **Completed review of the committee?** slider to **Completed**.

Notes:

Reviewer comments are viewable by students.

The change log will show any committee changes the student after the program approved or completed its review of the committee.



Program Office Change History

Review by Program Office

Completed review of the committee?
Not yet Completed

Once a student submits information, the program's Director of Graduate Studies (DGS) or DGS designate must review, insert comments (if necessary), and submit an approval decision. Please note that comments are part of the student's educational record and should not be considered private.

Feedback from Reviewer

Approve the committee?
Hold Approve

Reviewer Comments

Changes Since Last Approval

Reviewed the changes?
Not yet Yes

Below are changes made since the last approval.

To Reviewers: Please confirm if you have reviewed the changes made by the student after the approval. The review decision may need to be changed to "Hold" if the changes do not meet the requirements.

To Students: If required by your program, please communicate with your reviewers through the "Send Invitation Emails" so that they are aware of the changes made after the latest approval by the reviewers.

No change logs found.

as
the

move

made by

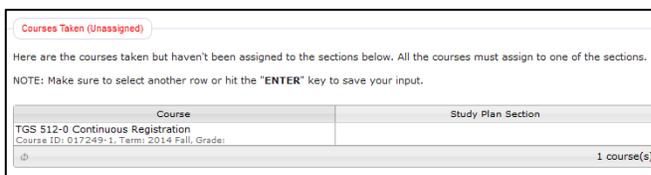
Plan of Study

The Plan of Study tab displays a student's completed and planned courses, which can be categorized under the program's course requirements.

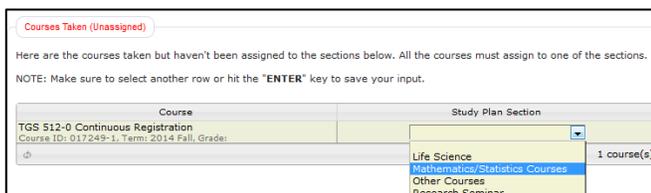
Note: Course requirements are defined and maintained by your program. For additional info on setting up course requirements, see **Plan of Study** under the **Administration** section of this manual.

Unassigned Courses

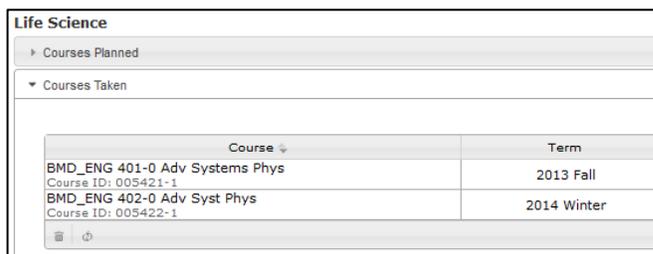
Unassigned courses are listed in the top left section of the Plan of Study tab and need to be assigned by the student or program to one of the program's course requirements.



To assign a course to one of the course requirements, click the course row in the Courses Taken table and a dropdown will appear. Select the appropriate course requirement, then click "Enter" on your keyboard.

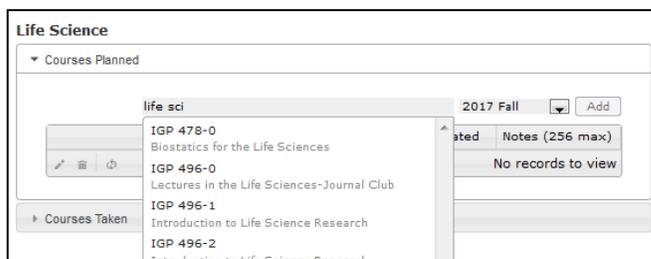


The assigned course will then appear under the appropriate course requirement section further down the page.



Planned Courses

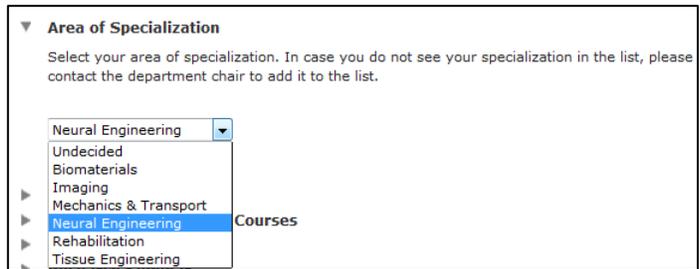
To add a course that the student plans to take in the future, start typing the course name or catalog number in the **Search Courses** field under the appropriate course requirement section, select the course when it appears, choose a planned term from the dropdown, then click **Add**.



Specialization

Indicate a student's specialization (if applicable) using the dropdown under **Area of Specialization**. Your choice will auto-save.

Note: Specializations are defined and maintained by your program. For additional info on setting up specializations, see **Plan of Study** under the **Administration** section of this manual.



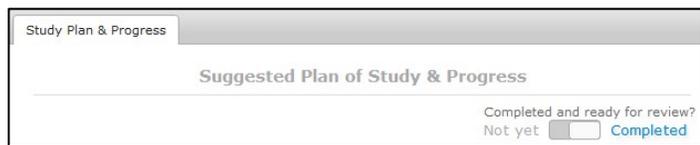
▼ **Area of Specialization**
Select your area of specialization. In case you do not see your specialization in the list, please contact the department chair to add it to the list.

Neural Engineering ▼
Undecided
Biomaterials
Imaging
Mechanics & Transport
Neural Engineering
Rehabilitation
Tissue Engineering

Courses

Program Approval

Once the plan of study is finalized, the student (or administrative user in some cases) should move the **Completed and ready for review?** slider to **Completed**. This indicates to the program that the student's plan of study is ready for review.

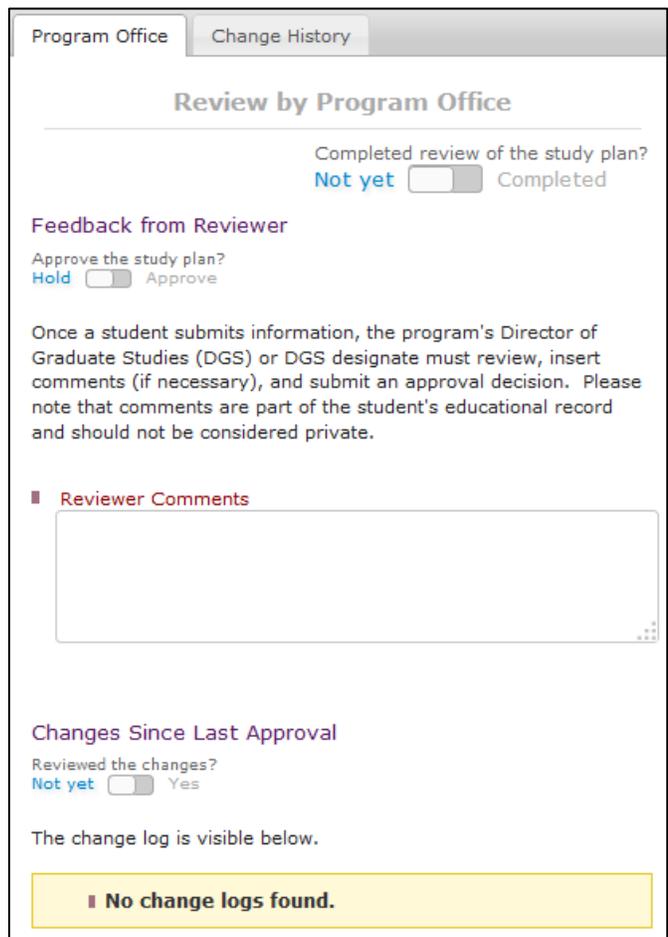


Study Plan & Progress

Suggested Plan of Study & Progress

Completed and ready for review?
Not yet Completed

Once a student's plan of study is marked as complete, the appropriate person in the program can review (adding comments, if needed) and approve the plan by moving the **Approve the study plan?** slider to **Approve**. Then move the **Completed review of the study plan?** slider to **Completed**.



Program Office | Change History

Review by Program Office

Completed review of the study plan?
Not yet Completed

Feedback from Reviewer

Approve the study plan?
Hold Approve

Once a student submits information, the program's Director of Graduate Studies (DGS) or DGS designate must review, insert comments (if necessary), and submit an approval decision. Please note that comments are part of the student's educational record and should not be considered private.

Reviewer Comments

Changes Since Last Approval

Reviewed the changes?
Not yet Yes

The change log is visible below.

No change logs found.

Notes:

Reviewer comments are viewable by students.

The change log will show any study plan changes made by the student after the program approved or completed its review of the plan.

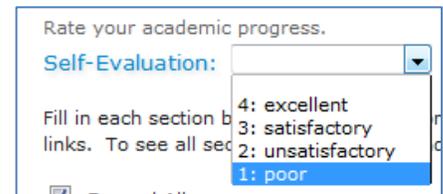
Academic Progress

Students track and maintain their academic activities throughout the year on the Academic Progress tab to facilitate the program's annual review of their progress.

Progress Items

There are 12 sections where student can record various progress items:

- **Self-Evaluation** – the student can use the Self-Evaluation dropdown to rate their progress on a 4-point scale.
- **Narrative Statement on Progress** – allows a space for students to provide a narrative overview of their academic progress thus far.
- **Research Topic** – provides space for students to type a brief overview of their research topic.
- **Awards** – a place to list any external awards.
- **Publications** – a place to list books, journals, and other publications authored by the student.
- **Honors** – a place for students to list their honors, accolades, and citations.
- **Meetings Attended/Presentations** – a place to list conferences attended and presentations given.
- **Teaching** – a place to record NU classes that a student taught or were otherwise involved with. Start typing a course name or number the **Search Courses** box to find NU courses.
- **Other Courses of Seminars Attended** – A place to list any courses, seminars, trainings, or other items attended that are not included elsewhere in the Academic Progress tab.
- **Goals for Academic/Research Progress for Upcoming Year** – a space for students to provide a narrative describing their academic and research goals for the upcoming year.
- **Annual Meeting** – a place for students to record the date of their annual meeting and list the committee members who were present.
- **Comments** – a free-text field for a student to add any comments or progress items that were not included in the other categories.

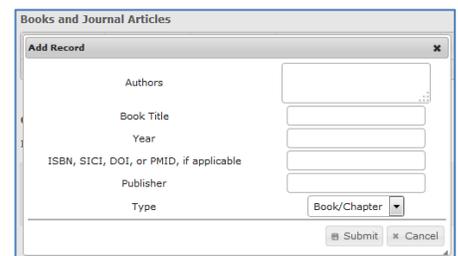


Rate your academic progress.

Self-Evaluation: [dropdown menu]

Fill in each section b links. To see all sec

- 4: excellent
- 3: satisfactory
- 2: unsatisfactory
- 1: poor



Books and Journal Articles

Add Record

Authors [text box]

Book Title [text box]

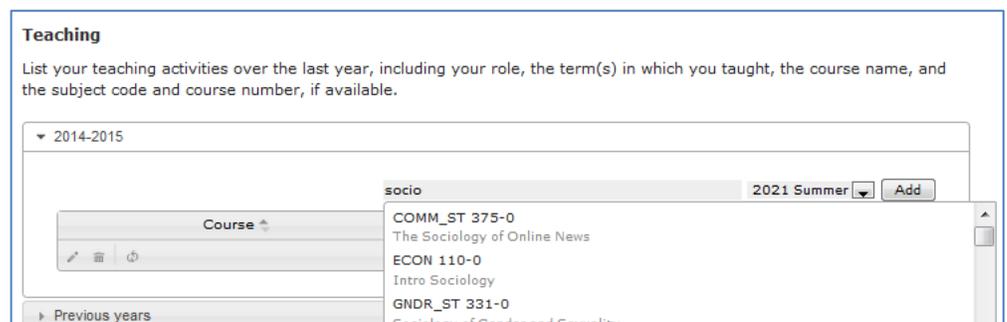
Year [text box]

ISBN, SICL, DOI, or PMID, if applicable [text box]

Publisher [text box]

Type [dropdown menu: Book/Chapter]

Submit Cancel



Teaching

List your teaching activities over the last year, including your role, the term(s) in which you taught, the course name, and the subject code and course number, if available.

2014-2015

socio 2021 Summer Add

Course [text box]

- COMM_ST 375-0
The Sociology of Online News
- ECON 110-0
Intro Sociology
- GNDR_ST 331-0
Sociology of Gender and Sexuality

Previous years

Program Approval

Once the annual academic progress is finalized, the student (or administrative user in some cases) should move the **Completed and ready for review?** slider to **Completed**. This indicates to the program that the student's annual academic progress is ready for review.

Once a student's annual academic progress is marked as complete, the appropriate person in the program can review it and enter a rating using the **Advisor Evaluation** dropdown, and add comments. They can then approve the academic progress by moving the **Approve academic progress?** slider to **Approve**. Then move the **Completed review of the academic progress?** slider to **Completed**.

Academic Progress can also be reviewed by a student's committee. Committee members can review (adding comments, if needed) and approve the plan by moving the **Approve academic progress?** slider to **Approve**.

Notes:

Reviewer comments are viewable by students.

The change log will show any academic progress changes made by the student after the program approved or completed its review of the academic progress.

Research Project

The Research Project tab is designed for programs that require a research project. However, any program may use this tab in a way that suits their needs, or it can be ignored if inapplicable.

Student fields

The students only have two simple text fields available on this tab: **Research Project**, for entering a description of the project, and **Comments** for the inclusion of any additional comments.

Program Approval

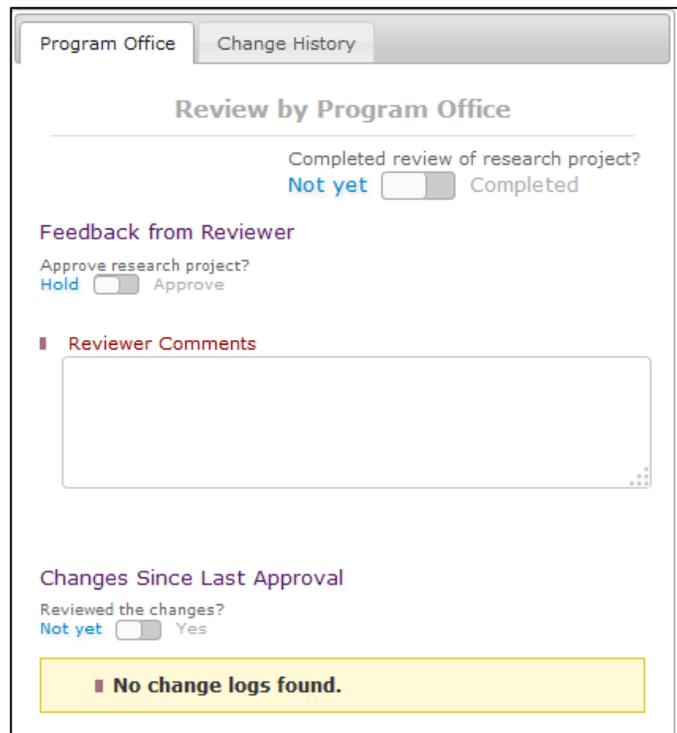
Once the research project is finalized, the student (or administrative user in some cases) should move the **Completed and ready for review?** slider to **Completed**. This indicates to the program that the student's research project is ready for review.

Once a student's research project is marked as complete, the appropriate person in the program can review (adding comments, if needed) and approve the project by moving the **Approve research project?** slider to **Approve**. Then move the **Completed review of research project?** slider to **Completed**.

Notes:

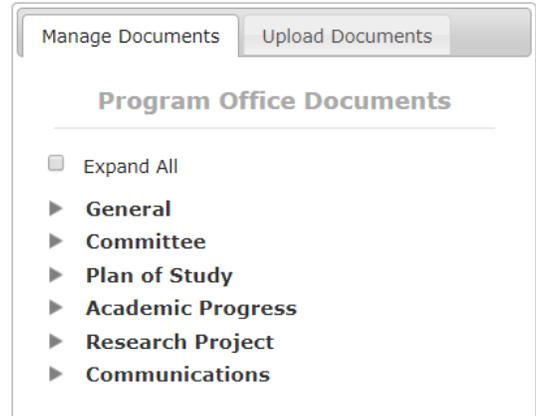
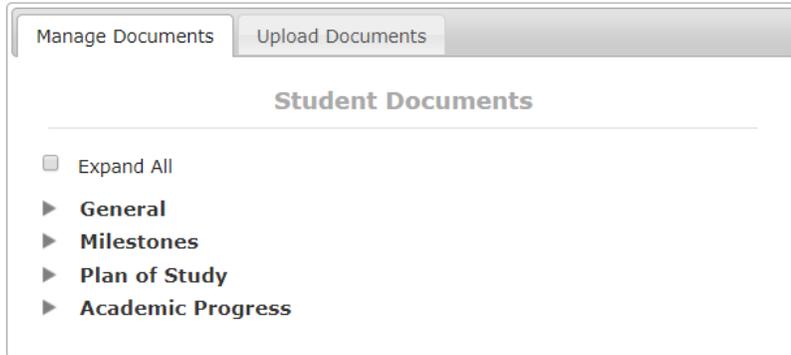
Reviewer comments are viewable by students.

The change log will show any research project changes made by the student after the program approved or completed its review of the project.



Documents

The Documents tab is where documents related to a student’s academic progress can be stored by either the student or the program. Documents can be stored as PDF files (with a maximum document size of 5MB) and affiliated with various sections of GSTS:



To add a document, select the “Upload Documents” tab. Select the document type from the dropdown menu. Add any relevant notes. Choose the file, making sure it’s a PDF no larger than 5MB, then select **Upload Document**.

Once uploaded, documents are accessible from the Documents tab, as well as the areas of GSTS that may have documents attached: Plan of Study, Academic Progress, Research Project, Milestones, Communications.

TGS Forms

The Graduate School requires that forms related to specific degree requirements are submitted by students and approved by programs. The tab “TGS Forms” houses these forms and allows students and programs to enter information about milestones and degree completion, which, upon approval, populates the University’s central student records system, CAESAR, and student transcripts.

TGS Forms were designed for students to initiate the form via GSTS and the program to review/approve. However, if programs prefer to fill out forms on behalf of students, this can be done. The following forms are available in GSTS:

Form	Purpose
Application for Degree	For students to petition to graduate in an upcoming quarter and indicate the name they’d like on their diploma, and the diploma mailing address.
Master’s Degree Completion	Indicates that all degree requirements for the master’s degree will be met, and a faculty committee verifies that the program’s requirements were satisfactorily completed.
Master’s in Primary PhD	For PhD students to request a master’s along the way to the PhD in the same program of study.
PhD Qualifying Exam	Indicates that admission to candidacy has been achieved by the student’s passing a comprehensive qualifying examination, written or oral or both.
PhD Prospectus	Indicates that a student has successfully defended the dissertation proposal, and lists the prospectus committee.
PhD Final Exam	Indicates that a student has successfully defended the dissertation and lists the dissertation committee.
Petition for Absence	For students to request a leave of absence (general or family) or request a parental accommodation.
Program Withdrawal Request	For students to request to withdraw entirely from their program of study.

Most, but not all, forms require student, DGS (or designates) and TGS be involved in the workflow:

	Student	DGS	TGS
Application for Degree	x	x	
Master’s Degree Completion	x	x	x
PhD Qualifying Exam	x	x	x
PhD Prospectus	x	x	x
PhD Final Exam	x	x	x
Petition for Absence	x	x	x
Program Withdrawal	x	x	x
Master’s in Primary PhD	x		x
Grade Report	x	x	x

View the [TGS Forms Administrative User Guide](#) for more detailed information and instructions.

Administration

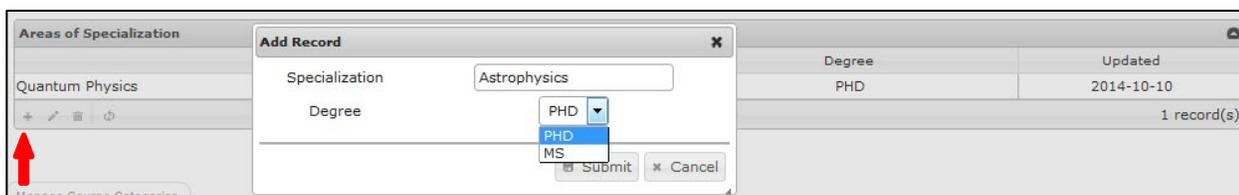
Use the Administration tab to setup and customize GSTS to fit your program's specific needs.

Plan of Study *setup tab*

Use the Plan of Study setup tab to define **Specializations** and **Course Categories**.

Areas of Specialization

To add a specialization, click the + button in the lower left of the Areas of Specialization table, type in the specialization name, indicate the degree type to which it applies, and click **Submit**.



Course Categories

Course categories classify what types of courses your students may take. To add a new course category, click the + button in the lower left of the Course Categories table, type in the category name, indicate the degree type to which it applies, and click **Submit**.



Course Category Assignment

Next, you must assign each course category to a specialization. If your program does not use specializations, you must assign each category to the **No Specialization** option.

(continued on next page)

To assign a course category to a specialization, click the + button in the lower left of the Course Category Assignment table, then complete the fields from top to bottom and click **Submit**.

Notes:

All fields are required except for **End Term**.

The **Course Category** and **Assign Specialization** fields will not be editable until you select a degree type from the first dropdown.

The **Start Term** field is what is sometimes referred to as the requirement term. It is used to indicate the first term for which a category was required for students.

The **End Term** field should be used when a course category is being retired.

Course Category	Degree	Specialization	Start Term	End Term
Mathematics/Statistics Courses	MS			
Other Courses	MS			
Research Seminar	MS			
BME Core Courses	PHD			
Mathematics/Statistics Courses	PHD			
Other Courses	PHD			
Research Seminar	PHD			
Research	PHD			
Biomaterials - 5 Course Categories				
BME Core Courses	PHD	Biomaterials	2000 Fall - [4000]	
Mathematics/Statistics Courses	PHD	Biomaterials	2000 Fall - [4000]	
Other Courses	PHD	Biomaterials	2000 Fall - [4000]	
Research Seminar	PHD	Biomaterials	2000 Fall - [4000]	
Research	PHD	Biomaterials	2000 Fall - [4000]	
Healthcare Engineering - 4 Course Categories				
Life Science	MS	Healthcare Engineering	2000 Fall - [4000]	

Adding explanatory text to course categories

Like most pages in GSTS, you can add/edit explanatory text on the Plan of Study tab. Click the **Edit** link to the right of a course category to add specifics about which and how many courses are required for the category.

Mathematics/Statistics Courses [Edit](#)

Two mathematics courses and a statistics course or two statistics course and a mathematics course from the following lists. Note that students should review course syllabi to avoid repeating courses similar to those taken at another institution.

Course	Term	Updated	Notes (256 max)
ES_APPM 311-1 Meth Appld Math Course ID: 005330-1	2011 Fall	2014-03-26	
STAT 351-0 Design Analysis of Experiments Course ID: 003397-1	2012 Spring	2014-03-26	
STAT 330-2 Appl Stat II Course ID: 003395-1	2012 Winter	2014-03-26	

Text entered under the **Specific to Program** tab will appear for this course category for all students in the program.

Text entered under the **Specific to {degree type} in the program** tab will appear only for those students with that degree type.

Specific to Program **Specific to {degree type} in the program**

Enter instructions that are specific to all the Biomedical Engineering students and click "Save" to submit.

Two mathematics courses and a statistics course or two statistics course and a mathematics course from the following lists. Note that students should review course syllabi to avoid repeating courses similar to those taken at another institution.

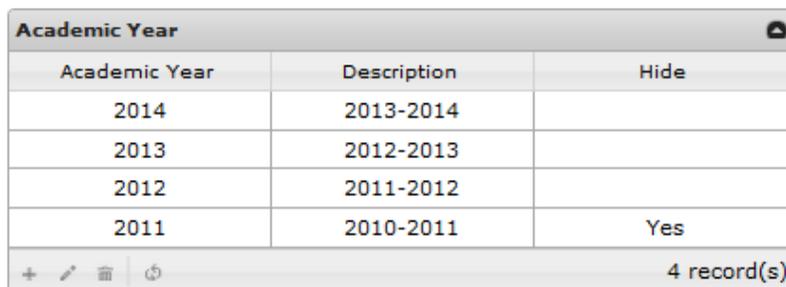
Save

Academic Progress setup tab

Use the Academic Progress setup tab to make additional years available for students to track their past or present progress, or to hide older years.

To add a new academic year, click the + button in the lower left of the Academic Year table, select the year from the dropdown, and click **Submit**.

To hide an older academic year, click the pencil icon, select **Yes** from the **Hide** dropdown, and click **Submit**.

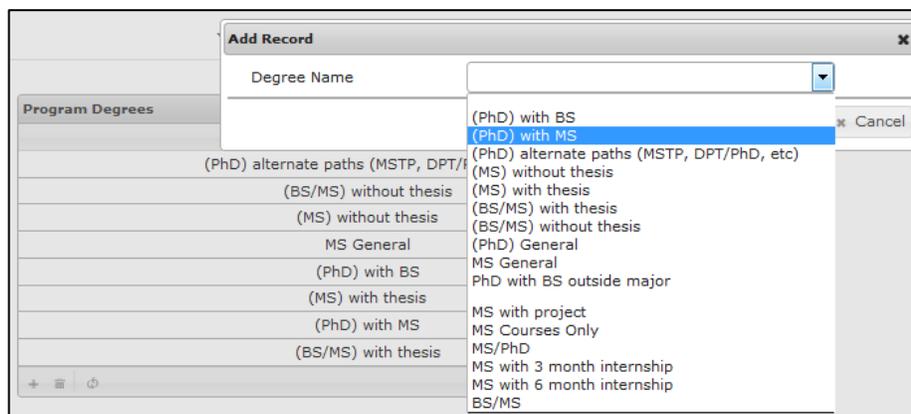


Academic Year	Description	Hide
2014	2013-2014	
2013	2012-2013	
2012	2011-2012	
2011	2010-2011	Yes

Degrees setup tab

Use the Degrees setup tab to define which types of degrees your program will use to classify students.

To add a degree type to the list, click the + button in the lower left of the Program Degrees table, select the degree type from the dropdown, and click **Submit**.



Notes:

Degree types default to PhD General and/or Master's General. Use this page to add additional options.

The list of available degree types is maintained by TGS. Please contact TGS if you would need a degree type that is not currently available in the system.

Milestones setup tab

Use the Milestones setup tab to define any program-specific milestones that are required of your students.

To add a milestone to the list, click the + button in the lower left of the Program Milestones table, select the Milestone type from the dropdown, and click **Submit**.

Notes:

All fields are required.

Deadline offset is the number of quarters from a student's entry term that will pass before the milestone due date.

Display is the order in which the milestone will be displayed among other program milestones.

Milestones must be added separately for each degree type that requires the milestone.

Milestones types are maintained by TGS. Please contact TGS if you would need a milestone type that is not currently available in the system.

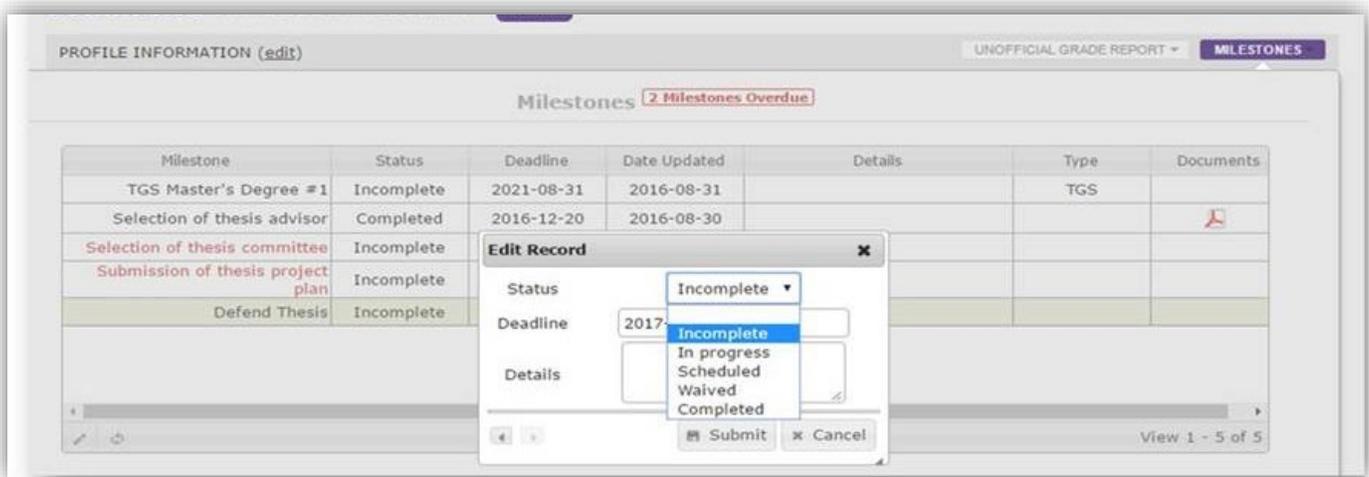
Milestone Name	Degree Type	Deadline offset(quarters)	Display
MS_to_PHD - 9 Milestones			
PHD_W_BS - 9 Milestones			
Versant English Test	PHD_W_BS	1	2
Completion of Coursework	PHD_W_BS	11	3
Advanced Calculus Exam	PHD_W_BS	3	4
Linear Algebra Exam	PHD_W_BS	3	5
Complex Variables Exam	PHD_W_BS	3	6
TA Requirement	PHD_W_BS	9	7
Differential Equations Exam	PHD_W_BS	3	8
RCR GEN_ENG 519	PHD_W_BS	4	9
CITI/RCR	PHD_W_BS	2	10
PHD_W_MS - 9 Milestones			
Versant English test	PHD_W_MS	1	2
Completion of Coursework	PHD_W_MS	11	3
Advanced Calculus Exam	PHD_W_MS	3	4
Linear Algebra Exam	PHD_W_MS	3	5
Complex Variables Exam	PHD_W_MS	3	6
Differential Equations Exam	PHD_W_MS	3	7
TA Requirement	PHD_W_MS	6	8
RCR GEN_ENG 519	PHD_W_MS	4	9
CITI/RCR	PHD_W_MS	2	10

Updating Student Milestones

If you have defined program-specific milestones, you must periodically update the status of those milestones to reflect if/when they have been completed. There are two ways to do so:

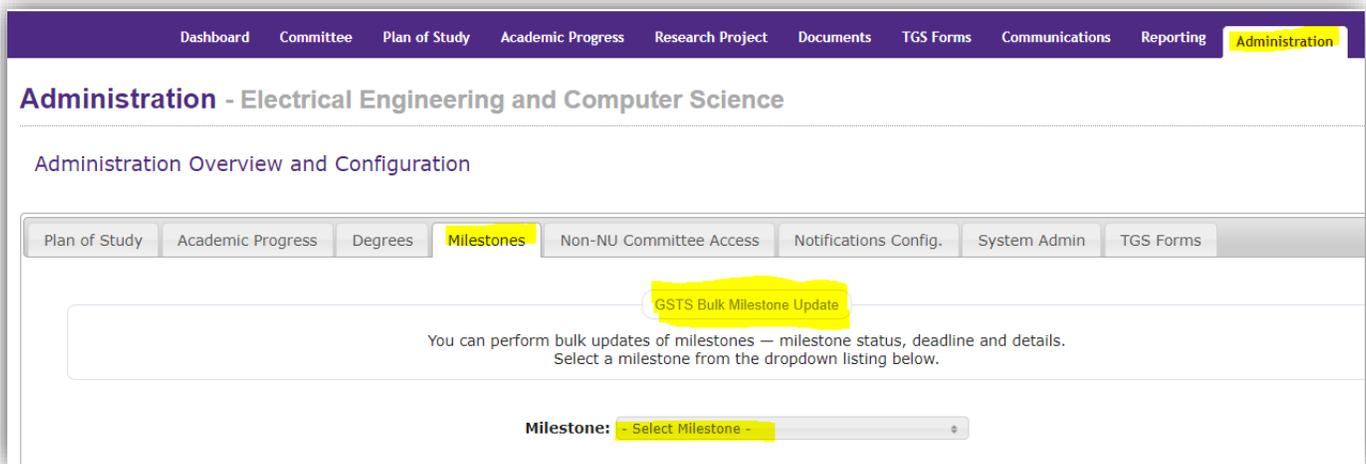
Updating milestones for individual students:

To update a milestone for an **individual student**, go to the student's Profile, then select Milestones from the dropdown. Click on the milestone you wish to update, then click the pencil (edit) icon. From there you can update the milestone status.



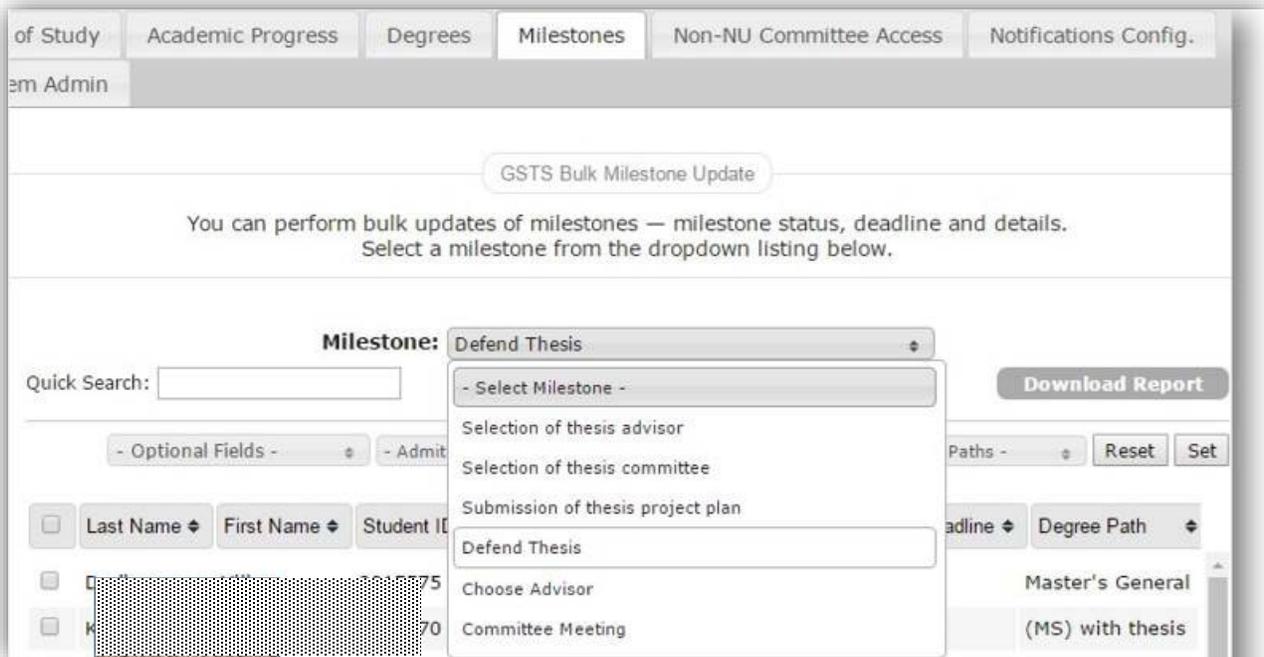
Updating milestones for multiple students (Bulk Milestone Update):

To update milestones **in bulk for multiple (or all) students** in your program, use the Bulk Milestone Update feature. Go to the Administration tab, and select Milestones. In the "GSTS Bulk Milestone Update" section at the top, select the milestone you wish to update.



(continued on next page)

You will then be presented with a list of all students. You can sort and filter the list, then select the students for whom you want to update the milestone status.



(continued on next page)

After you've selected the students for whom you want to update the milestone status, click the "Update Milestone" button. Select the appropriate status for all of the students you selected, then save changes. This will update the milestone status for a particular milestone for the group you selected.

The screenshot displays the "GSTS Bulk Milestone Update" interface. At the top, it states: "You can perform bulk updates of milestones — milestone status, deadline and details. Select a milestone from the dropdown listing below." Below this, there is a "Quick Search:" field and a "Download Report" button. A modal dialog titled "Update Milestone Information" is open, showing "Milestone Detail" information. The dialog prompts the user to "Update the necessary field(s) and click 'Save Changes' to submit." The fields include: "Status" (a dropdown menu currently showing "Unchanged" with "Completed" selected), "Deadline" (a text input field), and "Details" (a larger text input field). A "Save Changes" button is at the bottom of the dialog, and a "Close" button is at the bottom right. In the background, a table of milestones is visible, with columns for "Last Name", "First Name", "Deadline", and "Degree Path". The table shows several records, all with "Master's General" as the degree path. At the bottom of the interface, there are "Check All" and "Update Milestone" buttons, and a status indicator "10 record(s) found."

Notifications Configuration *setup tab*

Use the Notifications Config. setup tab to use the email notifications features of GSTS.

Notifications can be customized for each of the GSTS tabs. If your program has not yet configured their communication settings, you can start by clicking the **CONFIGURE GSTS COMMUNICATIONS** button.



Committee *communications settings*

For the committee tab, there are three types of email notifications available: **Invitations**, **Review Ready** notifications, and **Program Office Approval** notifications.

To activate or edit a notification, click the pencil icon.

Communication Type	Status	Student Receipt	Admin Recipients (Roles: Program and Advisors)	Custom Recipients	Email Template
Invitations	On	N/A	Off	N/A	N/A
Review-Ready-Notification	Off	N/A	Off		{recipient first name} {recipient last name}, The GSTS Committee has been completed for {student first name} {student last name} ({student netid}). Please review at your earliest convenience. Thank you, Graduate Student Tracking System
Program-Office-Approval	Off	Off	Off		{student first name} {student last name}, Your GSTS Committee has been approved. Please let us know if you have any questions. Thank you, Graduate Student Tracking System



(continued on next page)

For each notification, use **Status** to turn the notification type on or off.

Switch **Student Receipt** dropdown to **On** if you want the student to receive the notification. Student receipt is disabled for Review Ready notifications and Invitations (though students have the option on the invitation page to copy themselves on invitations).

Switch the **Admin Recipients** dropdown to **On** if your program’s administrative users and advisors should receive the notification.

Use **Custom Recipients** to indicate other specific GSTS users who should receive the notification.

Each notification has a default **Email Template** (except for Invitations—that template is maintained on the student’s invitation page). You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The bracketed items are necessary for the message to properly merge in people’s names and other information.

The screenshot shows a web form titled "Edit Record" with the following fields and options:

- Communication Type:** Review-Ready-Notification
- Status:** Off (dropdown menu)
- Student Receipt:** N/A (dropdown menu)
- Admin Recipients (Roles: Program and Advisors):** Off (dropdown menu)
- Custom Recipients:** -- Select -- (dropdown menu)
- Email Template:** A text area containing the following HTML template:

```
{recipient first name} {recipient last name},<br><br>The GSTS Committee has completed for {student first name} {student last name} ({student netid}).<br>Please review at your earliest convenience.<br><br>Thank you,<br>Graduate Student Tracking System
```

At the bottom right of the form are "Submit" and "Cancel" buttons.

Plan of Study *communications settings*

For the Plan of Study tab, there are two types of email notifications available: **Review Ready** notifications and **Program Office Approval** notifications. To activate or edit a notification, click the pencil icon.

Communication Type	Status	Student Receipt	Admin Recipients (Roles: Program and Advisors)	Custom Recipients	Email Template
Review-Ready-Notification	Off	N/A	Off		{recipient first name} {recipient last name}, The GSTS Plan of Study has been completed for {student first name} {student last name} ({student netid}). Please review at your earliest convenience. Thank you, Graduate Student Tracking System
Program-Office-Approval	Off	Off	Off		Your GSTS Plan of Study has been approved. Please let us know if you have any questions. Thank you, Graduate Student Tracking System

For each notification, use **Status** to turn the notification type on or off.

Switch **Student Receipt** dropdown to **On** if you want the student to receive the notification. Student receipt is disabled for Review Ready notifications

Switch the **Admin Recipients** dropdown to **On** if your program's administrative users and advisors should receive the notification.

Use **Custom Recipients** to indicate other specific GSTS users who should receive the notification.

Each notification has a default **Email Template**. You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The bracketed items are necessary for the message to properly merge in people's names and other information.

The 'Edit Record' dialog box shows the configuration for the 'Review-Ready-Notification'. The fields are: Communication Type (Review-Ready-Notification), Status (Off), Student Receipt (N/A), Admin Recipients (Roles: Program and Advisors) (Off), and Custom Recipients (-- Select --). The Email Template field contains the text: {recipient first name} {recipient last name}, The GSTS Plan of Study has been completed for {student first name} {student last name} ({student netid}). Please review at your earliest convenience. Thank you, Graduate Student Tracking System. The dialog has 'Submit' and 'Cancel' buttons at the bottom right.

Academic Progress *communications settings*

For the Academic Progress tab, there are three types of email notifications available: **Review Ready** notifications, **Program Office Approval** notifications, and **Committee Approval** notifications.

Communication Type	Status	Student Receipt	Admin Recipients (Roles: Program, Advisors, and Committee Members)	Custom Recipients	Email Template
Review-Ready-Notification	Off	N/A	Off		{recipient first name} {recipient last name}, The GSTS Academic Progress has been completed for {student first name} {student last name} ({student netid}). Please review at your earliest convenience. Thank you, Graduate Student Tracking System
Program-Office-Approval	Off	Off	Off		Your GSTS Academic Progress has been approved. Please let us know if you have any questions. Thank you, Graduate Student Tracking System
Committee-Approval	Off	Off	Off		Your GSTS Academic Progress has been approved by the following committee members: {committee members} Please let us know if you have any questions. Thank you, Graduate Student Tracking System

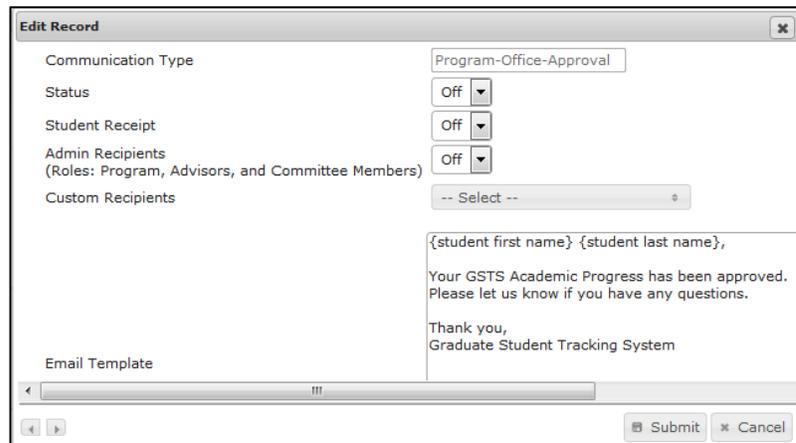


To activate or edit a notification, click the pencil icon.

For each notification, use **Status** to turn the notification type on or off.

Switch **Student Receipt** dropdown to **On** if you want the student to receive the notification. Student receipt is disabled for Review Ready notifications

Switch the **Admin Recipients** dropdown to **On** if your program’s administrative users and advisors should receive the notification.



Use **Custom Recipients** to indicate other specific GSTS users who should receive the notification.

Each notification has a default **Email** Template. You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The bracketed items are necessary for the message to properly merge in people’s names and other information.

Research Project *communications settings*

For the Research Project tab, there are three types of email notifications available: **Review Ready** notifications and **Program Office Approval** notifications. To activate or edit a notification, click the pencil icon.

Communication Type	Status	St Rd
Review-Ready-Notification	Off	
Program-Office-Approval	Off	

Edit Record
Communication Type: Review-Ready-Notification
Status: Off
Student Receipt: N/A
Admin Recipients (Roles: Program and Advisors): Off
Custom Recipients: -- Select --
{recipient first name} {recipient last name},
The GSTS Research Project has been completed for {student first name} {student last name} ({{student netid}}).
Please review at your earliest convenience.
Email Template: Thank you,
Graduate Student Tracking System
Submit Cancel (s)

For each notification, use **Status** to turn the notification type on or off.

Switch **Student Receipt** dropdown to **On** if you want the student to receive the notification. Student receipt is disabled for Review Ready notifications

Switch the **Admin Recipients** dropdown to **On** if your program’s administrative users and advisors should receive the notification.

Use **Custom Recipients** to indicate other specific GSTS users who should receive the notification.

Each notification has a default **Email** Template. You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The bracketed items are necessary for the message to properly merge in people’s names and other information.

Milestone *communications settings*

For milestones, you can turn on automated reminders that will be sent to students with incomplete milestones.

Communication Type	Status	Notification Intervals	Email Template
Milestone-Notification	Off	3 Months 2 Months 1 Month 3 Weeks 2 Weeks 1 Week	{student first name} {student last name}, You have the following upcoming milestone(s): {milestone details}Please contact your advisor if you have any questions. Thank you, Graduate Student Tracking System

To turn milestone reminders on or off and to edit the intervals at which they are sent, click on the Milestone-Notification row (shown above) and then click the pencil icon.

The 'Edit Record' form shows the following fields:

- Communication Type: Milestone-Notification
- Status: Off (dropdown menu)
- Notification Intervals: 6 selected (dropdown menu)
- Email Template: A text area containing the default template: {student first name} {student last name}, You have the following upcoming milestone(s): {milestone details}Please contact your advisor if you have any questions. Thank you, Graduate Student Tracking System

Buttons at the bottom: Submit, Cancel

Once you turn the reminders **On** using the **Edit Record** box that appears (shown above), you can adjust the reminder intervals by using the Notification Intervals dropdown and selecting which intervals you would like to use.

The milestone reminder has a default **Email Template**.

You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The

bracketed items are necessary for the message to properly merge in people’s names and other information.

The dropdown menu shows the following options:

- All (checked)
- None
- 3 Months (checked)
- 2 Months (checked)
- 1 Month (checked)
- 3 Weeks (checked)
- 2 Weeks (checked)
- 1 Week (checked)

Note: The intervals are equal to the amount of time before the milestone deadlines. To set milestone deadlines, please see **Milestones** in the **Administration** section of this document

TGS Forms *communications settings*

For the TGS Forms tab, there are three types of email notifications available: **Review ready, program office approval**, and **program office denial**. To activate or edit a notification, click the pencil icon.

TGS Forms - Notification Settings (Notification shaded green is turned on)						
Notification Type	Notification On/Off	Advisor Receipt	Student Receipt	Admin Recipients (Roles: Program)	Custom Recipients	Email Template
AFD-Program-Office-Approval-Denied	On	Off	On	Off		{student first name} {student last name}, Your Application for Degree form has been denied. Please review the comments area on your form for additional information. Form Details: Program and Degree: {form program degree} Expected Grad Term: {afd expected grad term} Thank you, Graduate Student Tracking System {recipient first name} {recipient last name},
AFD-Review-Ready-Notification	On	Off	Off	Off		The GSTS Application for Degree form has been completed for: {student first name} {student last name} ({student netid}). Form Details: Program and Degree: {form program degree} Expected Grad Term: {afd expected grad term} Please review at your earliest convenience. Thank you, Graduate Student Tracking System {student first name} {student last name},
MDC-Program-Office-Approval-Denied	On	Off	On	Off		Your Master's Degree Completion form has been denied. Please review the comments area on your form for additional information. Thank you,

12 record(s)

For each notification, use **Status** to turn the notification type on or off.

Switch **Student Receipt** dropdown to **On** if you want the student to receive the notification. Student receipt is disabled for Review Ready notifications

Switch the **Admin Recipients** dropdown to **On** if your program's administrative users and advisors should receive the notification.

Use **Custom Recipients** to indicate other specific GSTS users who should receive the notification.

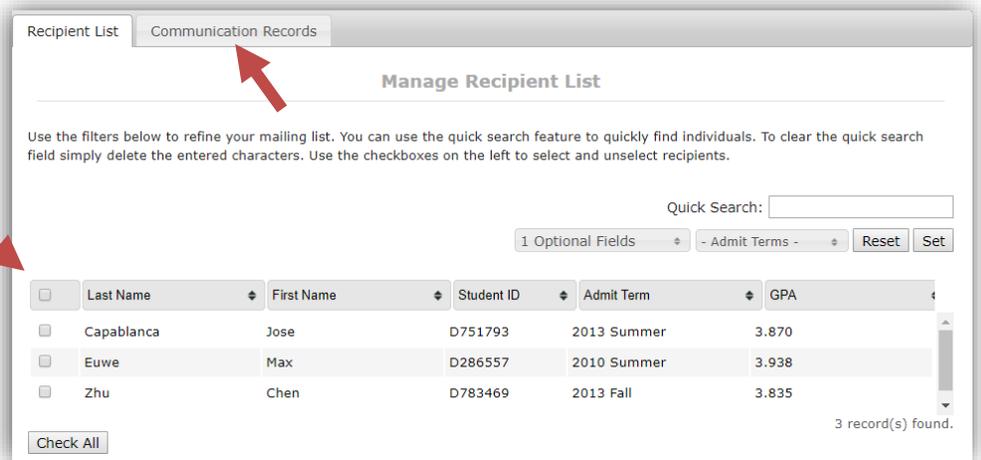
Each notification has a default **Email** Template. You can alter the default template, but do not to change any text that appears between the “{ }” brackets. The bracketed items are necessary for the message to properly merge in people's names and other information.

Communications

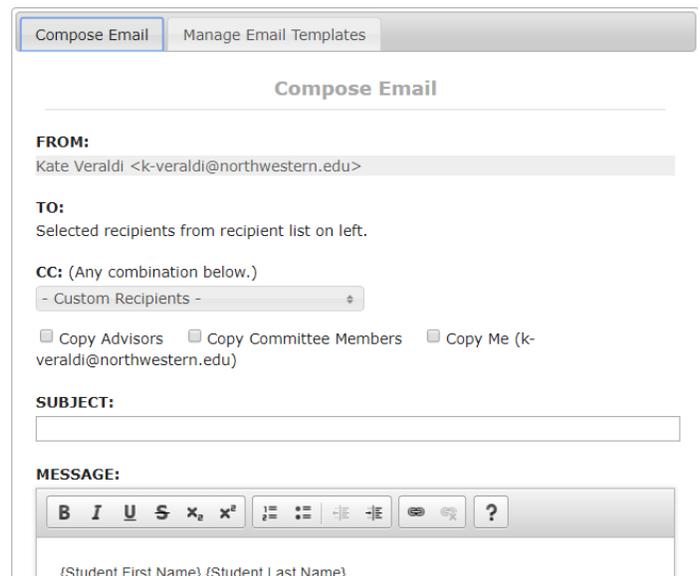
The Communications tab allows programs to communicate with students via GSTS, view communication records, and save message templates.

From the dashboard of students, use filters can be used to refine the mailing list, use the search function to find individual students, and/or use the checkboxes to select and deselect recipients.

See a record of emails sent to individual students in the “Communications Records” tab.



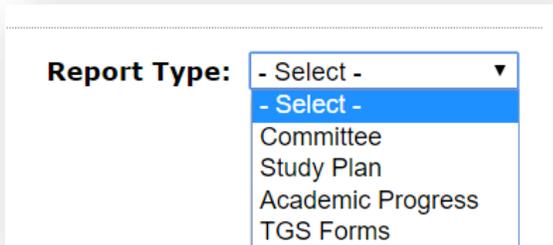
Compose one-off emails to send to multiple students chosen from the communications dashboard, or save frequently-used email templates in the “Manage Email Templates” tab for future use.



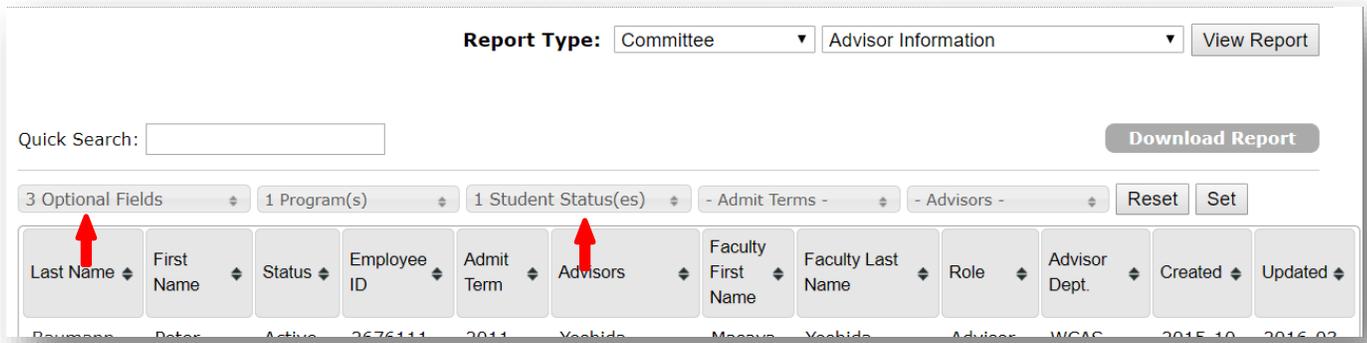
Reporting

Use the Reporting tab to query information housed in GSTS.

Use the Report Type dropdown to select the report category:



Then select the specific report, and click View Report. You can then adjust the optional fields, statuses, etc. to get the report output you are seeking.



Click the Download Report button to download your report into Excel.