

## How to Upload your Faculty Advising List of Students to ZogoTech and Send & Save a Batch Email

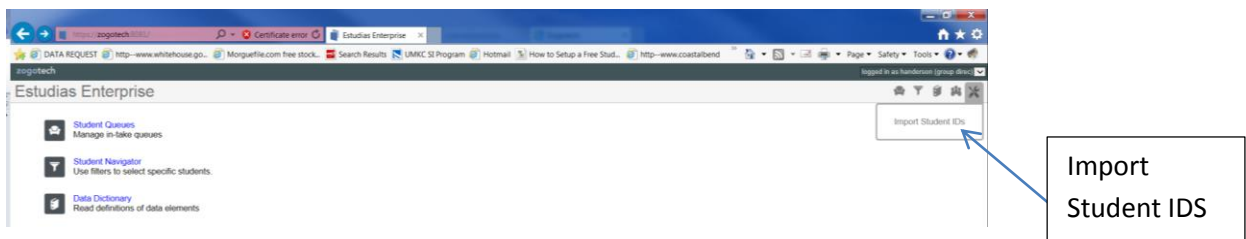
- 1) Open Microsoft Excel and create a spreadsheet with just your students' CBC ID #s. Do not use dashes, do not type their names, and do not create a heading. See example below.

120007743
123002061
138001919

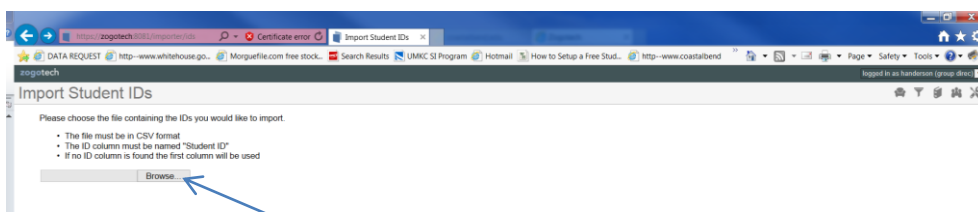
After typing in all of your students' ID #s in the A Column of your spreadsheet, go to "File" and "SAVE AS". Under File Name, name it something that makes sense to you. Under "Save as type;" select "CSV (Comma delimited) (\*.csv)." Don't worry about how the ID #s change in appearance as mine did below. Close the saved .csv file.

1.2E+08
1.23E+08
1.38E+08

- 2) Go to [www.coastalbend.edu/zogotech](http://www.coastalbend.edu/zogotech) and click on the word "HERE" to log in. It may say that it is not safe and ask if you want to continue even though the site doesn't have a certificate. YES, you do want to continue. Log in. (Some people have had problems using ZogoTech with Internet Explorer, I have not. It has been suggested to use other internet sites such as Firefox or Safari.)
- 3) To upload your .csv file of students that you saved, click on the Tools icon in the upper right corner that is a picture of a screw driver and wrench then click on "Import Student IDs."

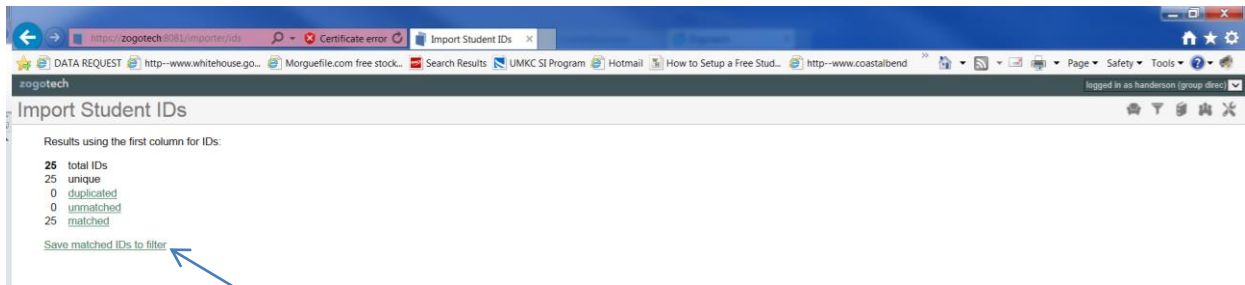


- 4) Browse through your files and select the file you saved earlier. Once you've found your file, "Open" it or just click "Enter."

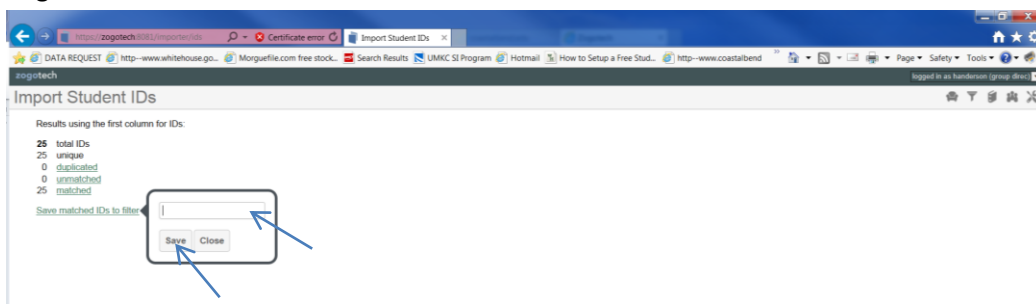


- 5) The next screen you get will look like the one below. Hopefully, all of your ID #s will match as mine did. If they do not match, you will need to check in Campus Connect to see if the student is still enrolled at CBC. It may be that he/she dropped and their status has not updated in ZogoTech yet. ZogoTech should update nightly.

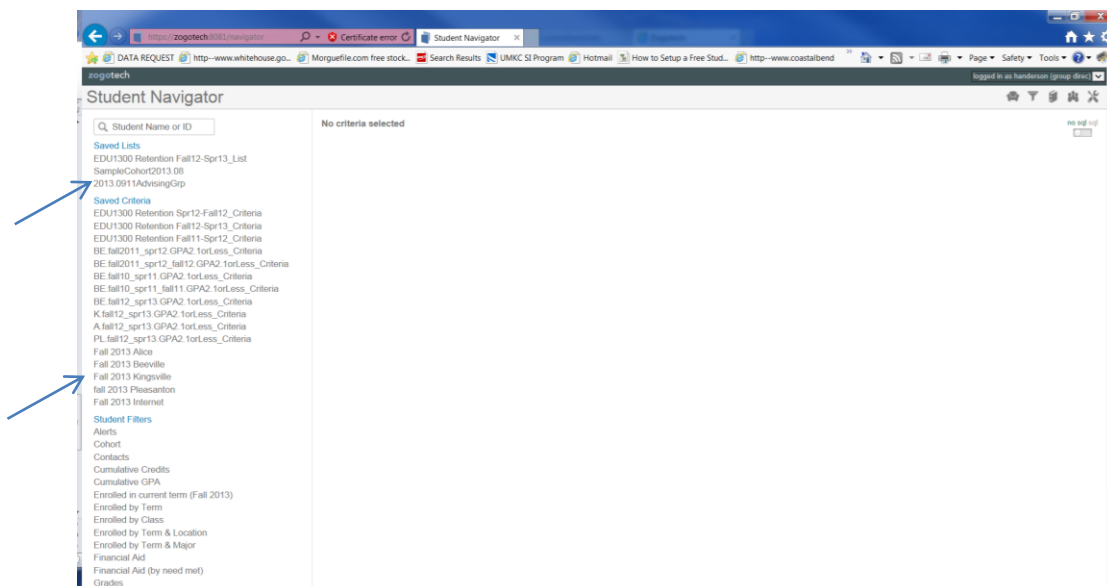
You now must “Save matched IDs to filter.” Click on that phrase.



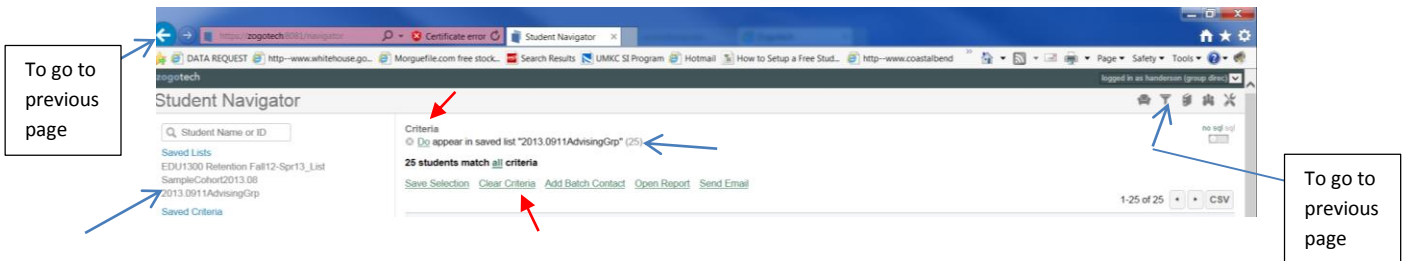
- 6) You must Name the file you are uploading then click “Save.” If you skip this step, your file will not be saved in ZogoTech.



- 7) I saved my file as “2013.0911AdvisingGrp.” Your saved file will appear under “Saved Lists.” Saved Lists don’t change. Saved Criteria is great for reports that you want to pull routinely; such as, a list of all of the students in your class, i.e. Biol 1408.01. If you save that Criterion, your list will change as students add/drop. You can see that under my Saved Criteria, I have criteria that will give me the number of students enrolled in fall 2013 at each campus/site and it changes daily as students are added/dropped.

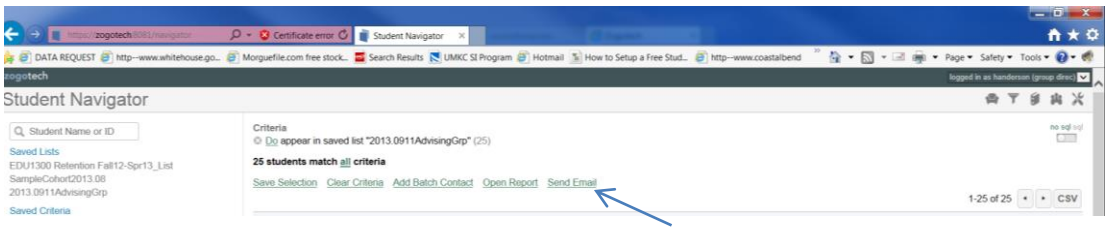


8) To see your list of students, simply click on the name of your file and all of your students will appear. Always look at the Criteria listed when you log in to ZogoTech. **If your Advising Group of students is already showing, you don't need to select them from your Saved Lists again. If you want to look at a different group of students, be sure to Clear Criteria so that you start with a blank template.** For FERPA reasons, I am not showing you my list of students because I want you to be able to print these steps and not worry about confidential information setting around. Your screen will have a list of your students under the information that you see below.

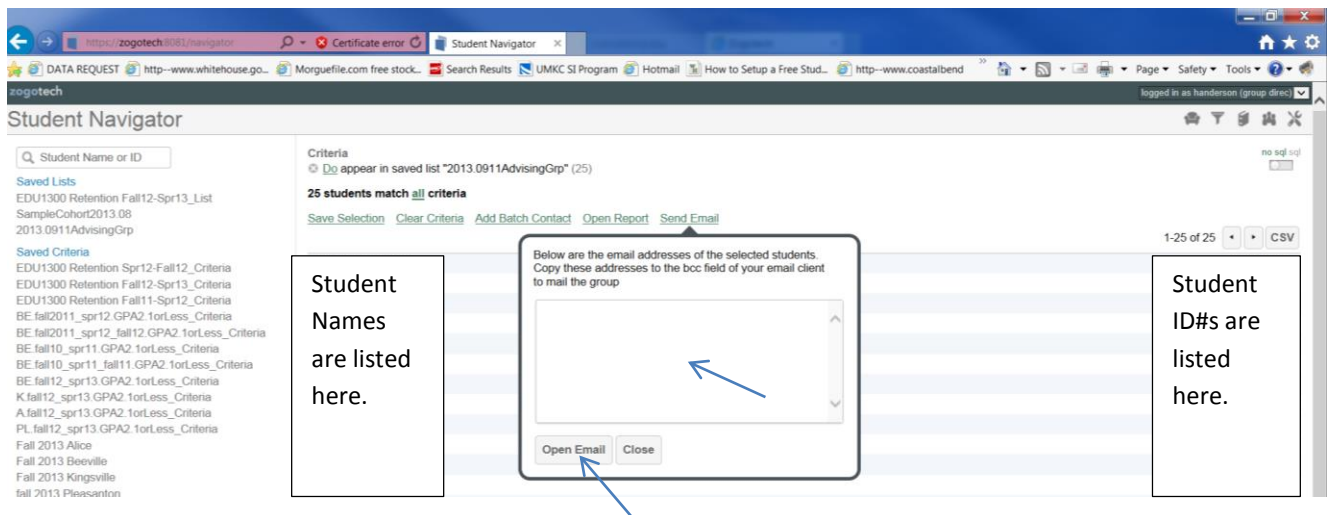


You may click on an individual student's name to see details about just that student. The students name will appear at the top with a series of tabs that you may click on: General Info, Contacts, Address, Classes, Tests, Financial Aid, and Degrees. To exit this page, you may use the back arrow or click on the Navigator icon in the upper right corner (it looks like a funnel).

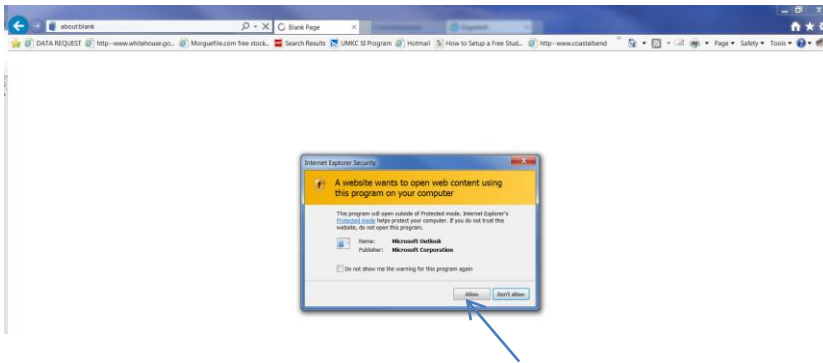
9) To Email your students, click on "Send Email."



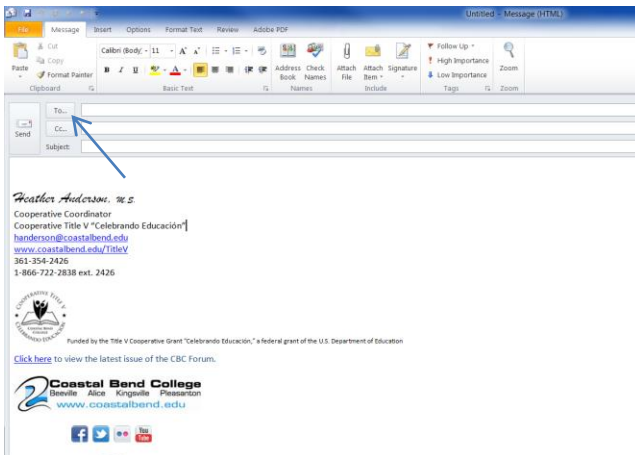
See example below. All of your students CBC Emails will appear already highlighted in a new box that opens. Right click with your mouse and save their emails. Then click "Open Email."



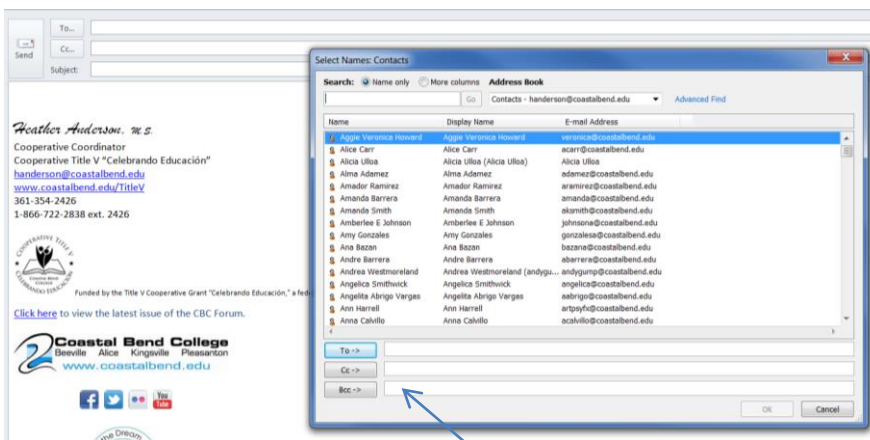
10) After clicking Open Email, you will get the screen below. Click “Allow.”



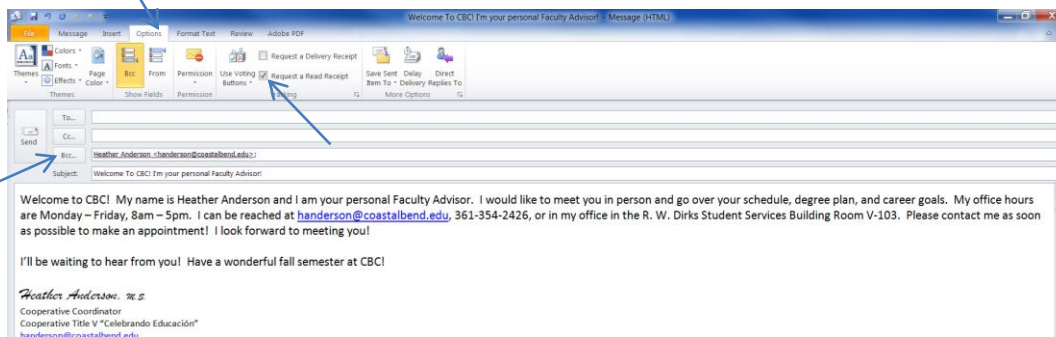
11) Your CBC Microsoft Email will open. Click on “To...” to bring up your address book and the additional option to “Bcc” your recipients. “Bcc” stands for Blind Carbon Copy. When you “Bcc” your recipients, each recipient only sees her/his name as the recipient. If you send your message via “To...,” all recipients will have each other’s email addresses and this violates FERPA.



You just saved your students CBC emails; therefore, paste them in the “Bcc->” Row as shown below.

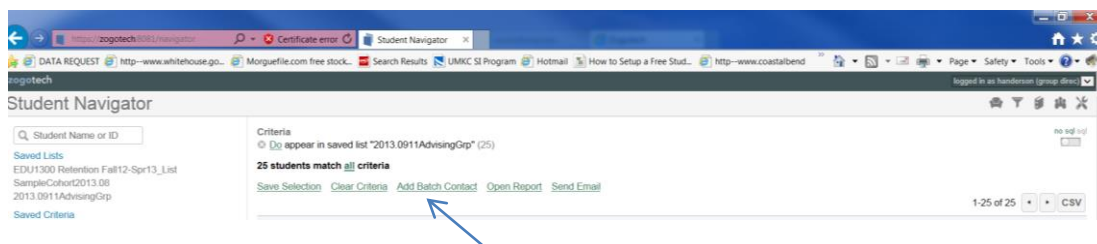


- 12) Compose your personal email to your list of students. My example is below. Note that under the “Options” tab, I selected “Request a Read Receipt” so that I will know if the student read my email or not. I did use my complete Signature Line in the email, but I cut it off below to save space.



**\*\*Before sending the email, Copy the body of your email including your name and title. Please do not copy the full Signature line with the links to Facebook, etc. Send the email.**

- 13) Now you must “Add Batch Contact” to show that you did email your students. Click on “Add Batch Contact.”



- 14) A New Batch Contact box will appear as shown below. Read each heading and use the drop down menus to make your selection for the type and reason for your contact. More Reason Options will be coming soon, but for now, many of your contact reasons will be “other.” If you are post-dating, you will have to change the date and time because ZogoTech automatically fills in the current date and time. Be sure to fill in the duration in minutes. If you sent an email, you will probably write 1, 2, or 3. When you meet your student in person; hopefully, you will be able to document at least 15 (minutes). You do not need to write the word minutes; only the number. Paste the body of your email into the “Notes” section. Delete any additional lines between paragraphs because it makes the Contacts Report very long. Click Save. The email you just sent to all your students on your Faculty Advising List is now **SAVED!** If you need to make any changes, you may go into each individual students file and make edits. Anyone who opens any students file can view all the contacts that have been made with that particular student. If you talk with a student who is not on your advising list, you should still document that you spoke with him or her if it is somehow related to academics. Please be professional and ethical in your documentation. This becomes a permanent record of the student’s file that everyone who has access to ZogoTech may also read including the student if he/she requests to see his/her record. Please also be professional, as you always are, and remember that all information is confidential and should not be shared with others even if you are best friends with the student’s aunt, for example.

\*When you have your list of Advisees showing in ZogoTech, click on any student’s name and see all the details from POISE, Campus Connect, and contacts that CBC employees have documented about that student. Click on the Contacts tab and you will see this statement: Showing contacts for  group: I suggest using the drop down menu to show contacts from ALL groups.

If you know you’re using the correct password and are still unable to gain access to ZogoTech, you may send an email to me at [handerson@coastalbend.edu](mailto:handerson@coastalbend.edu). I will double-check the user name and password that I have in the confidential ZogoTech files then email Ryan Franco to re-set your user name and password in “Active Directory” to the same user name and password that we have on file so that it matches your ZogoTech Client information that I have input into ZogoTech. The two must match in order for you to continue to have access. I advise everyone to request that Active Directory be installed on your computer so that you may change your password. When your password changes in Active Directory, it automatically changes in ZogoTech. This will help keep our files safe and confidential. On another note, if you ever change your user name or email in “Active Directory,” you must let me know so that I can update your ZogoTech client information so that it matches and you can continue to have access. Unfortunately, if you change your user name, all of the Saved Lists and Saved Criteria in ZogoTech will be lost.