UNIVERSITY OF CAMBRIDGE

Student Registry

Maintaining Supervisors and Advisors in CamSIS: A Guide for Degree Committees

Contents

1. Introduction

A student can have multiple advisors, in a number of different roles, allocated to them but every student on a postgraduate doctoral programme of study must have a Principal Supervisor (PS); doctoral students must also have an advisor allocated to them.

The following pages give Degree Committees (DCs) guidance on how to attach these supervisors and advisors to students in CamSIS.

The record in CamSIS must be maintained to accurately reflect each student's supervisor and advisor. Ensuring that these relationships are up to date allows the following:

- Termly supervision reports to be written
- Ability to comment on students' Self-evaluation reports
- Student change of circumstance applications (e.g. for intermission, leave to work away) to be approved by the supervisor
- Appropriate students to be registered for the PhD or EdD degree

Students should only have one *active* Principal Supervisor at a time and any change to a supervisor must also include the inactivation of the previous principal supervisor. Failure to inactivate a supervisor will cause problems for all of the processes listed above.

2. Useful information

Note: Throughout this guide, reference to supervisor also includes advisors

a) The Notification of New Postgraduate Supervisor Details Form

This form (link found on the [Information for Degree Committees](#) page) should be completed and sent to the [Student Registry](#) when an individual has a CRSid but no USN.
Student Registry will use the details on the form to create a record for the individual on CamSIS. Once an individual has a CRSid and USN, they can be assigned the Postgraduate supervisor/ advisor roles and be linked to students.

Please note that when the Student Registry has set-up a new supervisor/ advisor, it is the Degree Committee's responsibility to link the newly set-up supervisor/ advisor with their students on CamSIS.

b) Start Date of Supervisor Roles

It is important that the Start Date of any supervisor's role is the first day of the term in which the individual is first linked to the student; if the role Start Date is after the first day of a term, CamSIS will not allow the supervisor to view the student for that term or write a report for that term.

For example, if a PS starts supervising a student on 10/10/19, their Start Date for the role should be back-dated to 01/10/19 (the first day of Michaelmas Term '19) to enable them to view the student and submit a supervision report for them in Michaelmas Term (MT) '19. If the Start Date isn't back-dated, the first supervision report the PS will be able to submit will be for LT '20.

c) Employed by an English HEP or Cambridge College

If a student's PS is not employed by an English HEP (Higher Education Provider) or Cambridge College, the student must also be assigned a co-supervisor who is. This is to meet quality assurance requirements and confirm the accountability of supervisors. It also has a financial implication in that the university will not receive government funding for the student if they do not have a supervisor who is employed by an English HEP or Cambridge College.

d) Maintaining roles and student-affiliations on CamSIS

Pre-matriculation (pre-MATR): If an offer of admission has been made but the applicant is still at admissions stage, you will need to liaise with the Postgraduate Admissions Office (PAO) to amend any supervisor/ advisor roles attached to the applicant.

PAO will contact you if they can't find, on CamSIS, the person that you wish to allocate an applicant to, or if the supervisor/ advisor is not currently set-up with the particular role. Once the person is set-up and has the necessary roles, please confirm this to PAO and they will update the applicant's record.

Post-MATR (ie. applicant is now a current student):

For current students, it is the Degree Committee's responsibility to assign the supervisor/ advisor roles.

There are two pages that can be used to update student supervisor roles:

- **Maintain Student Advisors**– this page focuses on the student. It advises all of the User Roles that have been assigned to the student for a particular course of study. An overview of how this page works can be found in Appendix A

- **User Role Maintenance**– this page focuses on the supervisor/ advisor. It lists the roles that they have been assigned in which Department(s)/ Faculty(s); it also lists all of the students that they are affiliated with and in what role. An overview of how this page works can be found in Appendix B

Either page can be used to maintain the link between a student and a supervisor/ advisor.

e) Types of User Role for supervisors/ advisors

For University administrative purposes (and covered within this guide), the recognised User Roles for supervisors/ advisors are listed below.

Principal Supervisor– This is a student's main supervisor; a student should only have one active Principal Supervisor at any given time. Principal Supervisors are able to write/ edit termly reports on CamSIS.

Cambridge Supervisor– A student only needs a Cambridge Supervisor assigned to them if the Principal Supervisor is not employed by an English HEP or Cambridge College. Cambridge Supervisors are not currently able to write/ edit termly reports on CamSIS.

Other Supervisor– A co-supervisor who is able to write/ edit termly reports on CamSIS.

Graduate Advisor- This is the Advisor listed in the 'Code of Practice for research students'. The Advisor can't currently view, edit, or write reports.

There are a number of other User Roles that are only used by colleges and departments; any queries regarding the use of these should be directed to the CamSIS Helpdesk

f) The Principal Supervisor 'tick'

Every student on a postgraduate doctoral programme of study must have one active Principal Supervisor (PS):

Only applicable to a student's <u>active PS</u>, the Primary column **must** have a tick in it (click on the box and the tick appears; click on the box again, and the tick disappears).

If a student has a change in PS, the tick must be removed from the PS being made inactive, and must be added to the new PS:

	Current	Future	Past	Refresh List

Note: Rows should not be deleted from this table. Rather, add the date on which the Adviser concluded their role.

Academic Advisers   Find | 📊   First ◄ 1-5 of 5 ► Last

Details | Audit

	*User Role	Primary	Adviser Details	*Adviser	Name	CR Sid	*Start Date	End Date		
1	College Graduate Tutor	☐	View	▬▬▬	▬▬▬▬▬	▬▬	05/01/2022		➕	
2	Graduate Advisor	☐	View	▬▬▬	▬▬▬▬▬	▬▬	05/09/2019		➕	➖
3	Principal Supervisor	☑	View	30▬▬▬	▬▬▬▬▬	▬▬	17/04/2019		➕	➖
4	Principal Supervisor	☐	View	260▬▬▬	▬▬▬▬▬	▬▬	01/10/2018	16/04/2019	➕	➖
5	College Graduate Tutor	☐	View	▬▬▬	▬▬▬▬▬	▬▬	12/09/2018	04/01/2022	➕	

💾 Save	🔄 Return to Search	⬅ Previous in List	➡ Next in List	📧 Notify

In the screenshot above, you can see an active PS (highlighted in green; active because the role only has a Start Date), and an inactive PS (highlighted in yellow; inactive because the role has both a Start and End Date).

Notice that the inactive role doesn't have a Primary tick but the active role does:

- When the DC set the yellow PS to inactive, they un-ticked the Primary box
- When they added the new, active, green PS, they ticked the 'Primary' box- ensuring that the tick remains with only the active PS.

No Inactive PS should have a tick against them (unless it's the PS that the student completed the course with, and you added an End Date when the student's record has been completed).

3. Supervisor set up, and maintaining supervisor set up

a) Initial set-up: Raven, and CamSIS access

Anyone in a supervisor/ advisor role will need Raven access, and will then need to be set-up on CamSIS (if they don't already have a USN):

- Current members of the University and affiliated institutions are provided with a Raven account and password when they arrive- they should have a CRSid
  - Non-members who need to carrying out University business, can request a current member to request access on their behalf: https://help.uis.cam.ac.uk/service/accounts-passwords/it-staff/raven/raven-faqs/raven-request

- The **Notification of New Postgraduate Supervisor Details** form (link found on the Information for Degree Committees page) should be completed and sent to the Student Registry when an individual has a CRSid but no USN.
  Student Registry will use the details on the form to create a record for the individual on CamSIS. Once an individual has a CRSid and USN, they can be assigned the Postgraduate supervisor/ advisor roles and be linked to students.

Please note that when the Student Registry has set-up a new supervisor/ advisor, it is the Degree Committee's responsibility to link the newly set-up supervisor/ advisor with their students on CamSIS.

b) Add departmental-affiliation, and User Roles

Follow the guidance in this section when you know that an individual already has a CRSid and USN. as a supervisor in one Department and you want to add them to another Department, or if you want to add additional roles to an existing supervisor.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> PeopleTools> Security> User Profiles> User Role Maintenance** • Enter at least one of the key identifiers (USN, CRSid, or Last Name) for the supervisor/ advisor • Click 'Search' If you are new to the User Role Maintenance page, please refer to Appendix B for an overview.

2.	CRSids and USNs are unique to each person- if you search by USN or CRSid you will be taken straight to that person's User Role Maintenance page.
	If you search by Last Name only, you may be presented with a number of Search results to pick from- take care to pick the right person.
3.	On the individual's User Role Maintenance page, you will either see:
	• Their existing role set-ups (if they are for a Department/ College that you are not affiliated with, you will see the role, the number of students linked to the role, and the College/ Department but never any individual student details):
	Or:
	• That they have no roles to date:

4.	**If the individual has existing roles**, to add a new role:

	• Click on any of the '+' buttons in the User Role section
	
	 • On the new 'User Role' row added:
	    o Select the role that you are wishing to add from the drop-down list
	    o Select the Department you wish to assign the role to from the options available when you click on the magnifying glass (Look Up) icon
	    o Enter the Role Start Date (it should be prior to the start date of the term in which the role is to be first used, eg. 30/09/xx if the role is to be first used from Michaelmas Term (which starts on 01/10/xx))
	    o If the role is for a fixed period of time, enter the Role End Date (otherwise leave this field empty
	    o Save
	
	 If you need to add another role, click on the '+ icon at the end of an existing row, and repeat the above steps.

5.	**If the individual doesn't have existing roles**, a blank User Role row will already show:

- On the 'User Role' row:
  - Select the role that you are wishing to add from the drop-down list
  - Select the Department you wish to assign the role to from the options available when you click on the magnifying glass (Look Up) icon
  - Enter the Role Start Date (it should be prior to the start date of the term in which the role is to be first used, eg. 30/09/xx if the role is to be first used from Michaelmas Term (which starts on 01/10/xx))
  - If the role is for a fixed period of time, enter the Role End Date (otherwise leave this field empty
  - Save

If you need to add another role, click on the '+ icon at the end of the row, and repeat the above steps.

6.	Once the required role(s) is added, you can click on the 'Add New Student' button to link supervisor to student:

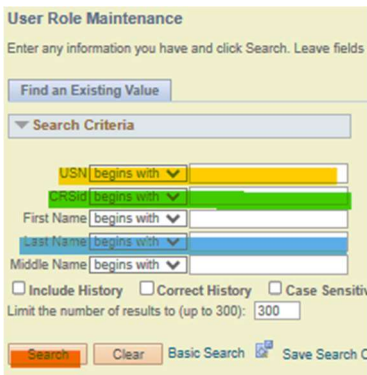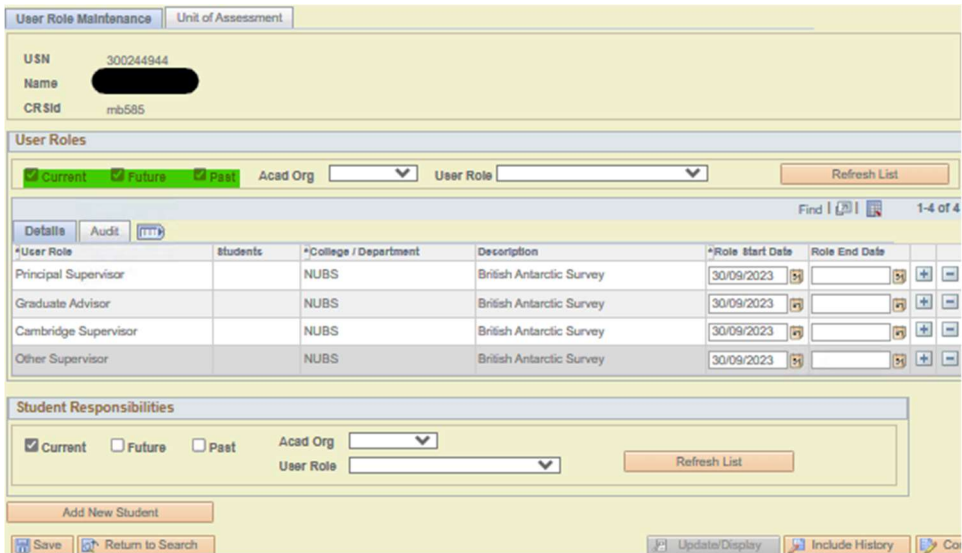Further guidance on how to link a supervisor to student can be found

c) If a User Role is added by accident

User Role rows should only ever be deleted if they were added in error, for example, adding a row to the wrong individual.

If an individual is no longer employed in one of their assigned User Roles, the [How to close a User Role](#) guidance should be followed.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> PeopleTools> Security> User Profiles> User Role Maintenance** • Enter at least one of the key identifiers (USN, CRSid, or Last Name) for the supervisor/ advisor • Click 'Search' If you are new to the User Role Maintenance page, please refer to Appendix B for an overview.
2.	CRSids and USNs are unique to each person- if you search by USN or CRSid you will be taken straight to that person's User Role Maintenance page. If you search by Last Name only, you may be presented with a number of Search results to pick from- take care to pick the right person.
3.	On the individual's User Role Maintenance page, you will see all the roles assigned to them for your Department (it's always advisable to have the Current, Future, and Past boxes ticked):

4.	Hopefully the error will have been picked up before any students are assigned but, if that's not the case, make sure that the link to any students is removed using the [When a supervisor/ advisor is attached to a student in error](#) guidance.
5.	To delete a User Role: • Click the '-' icon at the end of the User Role row that is to be removed
6.	• Click 'Ok' when prompted

7.	• Save If there is more than one User Role to be removed, repeat the above steps.

d) How to close a User Role

If an individual is going to stop working in one of their assigned User Roles, the link between them and their students needs to be closed, and the User Role then needs to be closed.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> PeopleTools> Security> User Profiles> User Role Maintenance** • Enter at least one of the key identifiers (USN, CRSid, or Last Name) for the supervisor/ advisor • Click 'Search' If you are new to the User Role Maintenance page, please refer to Appendix B for an overview.

2.	CRSids and USNs are unique to each person- if you search by USN or CRSid you will be taken straight to that person's User Role Maintenance page.
	If you search by Last Name only, you may be presented with a number of Search results to pick from- take care to pick the right person.
3.	On the individual's User Role Maintenance page, you will see all the roles assigned to them for your Department (it's always advisable to have the Current, Future, and Past boxes ticked):
4.	If there are any active students attached to the supervisor in the User Role(s) that needs to be closed, follow the Closing a link between a student and a supervisor/ advisor guidance to close those links, and re-assign those students (using either the Adding a link between one supervisor and multiple students, or Attach one student to one or more supervisor(s)/ advisor(s) guidance).

5.	To close a User role:

- Enter the date that the individual is to finish in the specific role in the Role End Date field
  - o The exact date can be used if it's known, or it can be the end of the term in which the individual is finishing in the role
- Save

4.   Managing links between Supervisors and their students

a) Adding a link between one supervisor and multiple students
The process listed below should be used when you want to allocate a number of students to the same supervisor.

Steps	Action
1.	**On CamSIS, navigate to: NavBar (the compass icon)> Navigator> PeopleTools> Security> User Profiles> User Role Maintenance** • Enter at least one of the key identifiers (USN, CRSid, or Last Name) for the supervisor/ advisor that you wish to allocate the students to • Click 'Search' If you are new to the User Role Maintenance page, please refer to Appendix B for an overview.
2.	CRSids and USNs are unique to each person- if you search by USN or CRSid you should be taken straight to that person's User Role Maintenance page. If you search by Last Name only, you may be presented with a number of Search results to pick from- take care to pick the right person. If your Search returns no results or if the User Role Maintenance page shows no User Roles, it suggests that the individual has not been set up as supervisor yet.

3.	To request that someone is set up as a supervisor:
	
	• Go to the Student Registry Information for Degree Committees page
	• In the Appointing supervisors section, download a copy of the 'Notification of New Postgraduate Supervisor Details Form'
	• Complete the form and return it to the Student Registry at recordsandexams@admin.cam.ac.uk
	  ○ Please ensure that you provide us with the individual's CRSid
	  ○ If you know that they have a pre-existing USN (eg. they've been a student previously), please also include that.
	
	Once Registry have confirmed to you that the individual has been set up, you can continue with the steps below

4.	Looking at the **Student Responsibilities** section:
	
	• If the individual doesn't have any students attached to them
	  ○ Click on the 'Add New Student' button
	
	• If the individual has one or more students listed
	  ○ Click on the plus '+' icon at the end of any of the rows
	
	Remember that the Current/ Future/ Past filters can be ticked or unticked to change the lists of students you see in this section– just click on the 'Refresh List' button if you make any changes to the filters

5.	A new row will be added to the list:

	• In the **User Role** column, use the drop-down option menu to select the appropriate User Role
	   o If you select the **Principal Supervisor** role, please click on the box in the **Primary** column- a tick should appear in the box
	      ▪ Without this tick, the PS will not be able to write termly supervision reports
	      ▪ The tick isn't required for any other User Role
	
	Please remember that a student should only have one active PS at any given time. If a student has a change of PS, the currently active PS should have an End Date added to the User Role and the Primary tick removed- see Section 3; the new PS should then be attached and the Primary tick added against their User Role.

6.	To attach the student to the User Role you just entered:
	
	• Enter the student's USN in the **Student USN** field- the CRSid and Name fields will auto-populate
	
	If you don't know the student's USN, click on the magnifying glass icon to the right of the field- this will open the Lookup function
	   o The Lookup will allow you to search for the student by CRSid or Name
	      ▪ When you've found the right student, click on their details to select

7.	In the **Career** column: • Using the drop-down option menu, select the appropriate Career

8.	Looking at the **Career Nbr**, **Programme**, and **Plan** columns:
	
	• Check that Programme and Plan read as you expect:
	   o ie. if you are attaching a student who you know has the Programme 'NOTAF' and they are currently on the Plan for NOTAF in Engineering, check that those details show in the respective column
	
	• If the details are not right, click on the magnifying glass icon to the right of the **Career Nbr** field to access the Lookup function
	   o If a student is on their first Programme/ Plan (course) within this Career, the Career Nbr associated with the course will be 0
	   o If a student is on their second or subsequent Programme/ Plan (course) within this Career, the Career Nbr associated with the course will be 1 or higher
	      ▪ The Lookup function will list all of the student's Career Nbrs within this Career- click on the appropriate Career Nbr to correctly populate the Programme and Plan columns

9.	The **Start Date** of a supervisor/ advisor User Role **MUST** be the first day of a term. The Start Date of terms, for the purpose of User Roles, are: • 1st October for Michaelmas Term (MT) • 5th January for Lent Term (LT) • 17th April (10th April in a Leap Year) for Easter Term (ET) If the Start Date is after the first day of term, the supervisor will not be able to write a termly report for that term.

10.	Discretion will be needed in regard to the Start Date if a student changes supervisor part-way through a term: • You could back-date the Start Date if the change was made relatively early in the term and the individual was supervising the student for the majority of the term, so should be the one to submit a report for the given term • You could forward-date the Start Date (to the start of the next term) if it's relatively late in the current term and the student's previous supervisor is expected to write the current term's report Remember that if you are attaching a student to a new supervisor you may need to close the link to the previous supervisor- Section 3 gives guidance on this. You need to take in to consideration the End Date of the previous supervisor's role, as well as what the new supervisor's Start Date should be- they shouldn't be active at the same time. Also take care that the Start Date of the supervisor/ advisor's attachment to the student isn't prior to their Role Start Date- you can see the Role Start Date at the top of the page, in the User Roles section ie. If an individual has a Principal Supervisor role at Biology that has a Role Start Date of 01/10/18, they can't be allocated as a PS to a student wef 17/04/18 because that date is prior to when they were first set up as a PS.
11.	Click on the '**Save**' button at the bottom of the page to save this supervisor/ advisor to student set-up. NB/. Alternatively, if you have multiple students to attach to this supervisor/ advisor, you could save your entries periodically, or add them all and then save.
12.	Repeat the above steps as necessary for any more students that you need to attach to this supervisor/ advisor

b) Attach one student to one or more supervisor(s)/ advisor(s)

The process listed below should be used when you are attaching several supervisors/ advisors to one student.
It can also be used when maintaining the link between one student and one supervisor/ advisor.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> Records and Enrolment> Student Background Information> Maintain Student Advisors** • Enter at least one of the key identifiers (USN, CRSid, or Name) for the student that you wish to add User Roles to • Click 'Search' If you are new to the Maintain Student Advisors page, please refer to <u>Appendix A</u> for an overview.
2.	CRSids and USNs are unique to each person- if you search for a student using their USN or CRSid you should be taken straight to their Maintain Student Advisors page • The exception to this is if the student has more than one course of study within an Academic Career, eg. if a student has completed a MPhil and is now studying for a NOTAF, they will have PGRD row for the MPhil and a second PGRD row for the NOTAF. • Take care to select the row corresponding to the course of study (Academic Programme) that you wish to amend for the student. If you search by Name only, you may be presented with a number of Search results to pick from- take care to pick the right student.
3.	Once on the student's page, double-check that the right details show at the top of the page, ie. check that the name is as you expect, the Programme and Plan is right etc
4.	Tick all of the Filters- Current, Future, and Past- and click on the 'Refresh List' button • If the student has never been attached to a supervisor/ advisor, the Academic Advisors section will remain blank • If the student only has Current advisors, the list in the Academic Advisors section won't change • If the student has had any supervisors/ advisors allocated to them in the past or have supervisors/ advisors with a Start Date in the future, the list in the Academic Advisors section will now have a larger number of rows Having all of the Filters ticked will give you a better overview of the student's supervisor/ advisor history.

5.	To attach a new supervisor/ advisor to the student, look at the Academic Advisors section:
	
	• If the student doesn't have any supervisors/ advisors attached to them
	    o Click on the 'Add New Advisor' button
	
	• If the student has one or more supervisors/ advisors listed
	    o Click on the plus '+' icon at the end of any of the rows

6.	A new row will be added to the list:
	
	• In the **User Role** column, use the drop-down option menu to select the appropriate User Role
	  o If you select the **Principal Supervisor** role, please click on the box in the **Primary** column- a tick should appear in the box
	    ▪ Without this tick, the PS will not be able to write termly supervision reports
	    ▪ The tick isn't required for any other User Role
	
	Please remember that a student should only have one active PS at any given time. If a student has a change of PS, the currently active PS should have an End Date added to the User Role and the Primary tick removed- see Section 3

7.	In the **Advisor** column:
	
	• If you know the supervisor/ advisor's USN, enter it in the blank field
	  o The Name and CRSid fields should atuo-populate
	
	• If you don't know the supervisor/ advisor's USN, click on the magnifying glass icon to access the Lookup function
	  o The Lookup function will allow you to search for the supervisor/ advisor by CRSid or Name
	    ▪ Click on their name to populate the Advisor fields of the Academic Advisors section
	
	  o If the person you are searching for doesn't appear in the Lookup function, it is likely that they've not been set-up as a supervisor/ advisor. Step 2 of Section 1 gives guidance on how to request the necessary set-up
	    ▪ Proceed with the steps below once the Registry has confirmed set-up

8.	In the **Start Date** column: The **Start Date** of a supervisor/ advisor User Role **MUST** be the first day of a term. The Start Date of terms, for the purpose of User Roles, are: • 1st October for Michaelmas Term (MT) • 5th January for Lent Term (LT) • 17th April (10th April in a Leap Year) for Easter Term (ET) If the Start Date is after the first day of term, the supervisor will not be able to write a termly report for that term.

9.	Discretion will be needed in regard to the Start Date if a student changes supervisor part-way through a term:
	• You could back-date the Start Date if the change was made relatively early in the term and the individual was supervising the student for the majority of the term, so should be the one to submit a report for the given term
	• You could forward-date the Start Date (to the start of the next term) if it's relatively late in the current term and the student's previous supervisor is expected to write the current term's report
	Remember that if you are attaching a student to a new supervisor you may need to close the link to the previous supervisor- Section 3 gives guidance on this. You need to take into consideration the End Date of the previous supervisor's role, as well as what the new supervisor's Start Date should be- they shouldn't be active at the same time.
	If an error message appears when you enter a Start Date it may be that the supervisor/ advisor wasn't active in the role on that date. You can check and amend the Start Date of the User Role by looking at the supervisor/ advisor's set up in the User Roles section of the User Role Maintenance page.
	ie. If an individual has a Principal Supervisor role at Biology that has a Role Start Date of 01/10/18, they can't be allocated as a PS to a student wef 17/04/18 because that date is prior to when they were first set up as a PS.
10.	Click on the '**Save**' button at the bottom of the page to save this supervisor/ advisor to student set-up.
11.	Repeat the above steps as necessary for any more supervisors/ advisors that you need to attach to this student.

c) Closing a link between a student and a supervisor/ advisor

When a student is attached to a new supervisor/ advisor, the link to the previous supervisor/ advisor needs to be closed.
If there is a change in Principal Supervisor (PS), the Primary tick will also need to be removed from the old PS and added to the new PS.

The guidance in this section should also be followed when a Masters student has completed their course of study, ie. the point at which the FAPP row has been added.

- Point of note regarding PhD students under exam and nearing completion: We kindly ask that DC's don't take any action with regard to closing the student-supervisor link in this instance. For statutory reporting purposes the link must remain active until the student's hard-bound thesis has been submitted and Student Registry have COMP'd the record; Student Registry will add an End Date for the link as part of our record completion procedure.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> Records and Enrolment> Student Background Information> Maintain Student Advisors** • Enter at least one of the key identifiers (USN, CRSid, or Name) for the student that you wish to update User Roles for • Click 'Search' If you are new to the Maintain Student Advisors page, please refer to Appendix A for an overview.
2.	CRSids and USNs are unique to each person- if you search for a student using their USN or CRSid you should be taken straight to their Maintain Student Advisors page • The exception to this is if the student has more than one course of study within an Academic Career, eg. if a student has completed a MPhil and is now studying for a NOTAF, they will have PGRD row for the MPhil and a second PGRD row for the NOTAF. • Take care to select the row corresponding to the course of study (Academic Programme) that you wish to amend for the student. If you search by Name only, you may be presented with a number of Search results to pick from- take care to pick the right student.
3.	Once on the student's page, double-check that the right details show at the top of the page, ie. check that the name is as you expect, the Programme and Plan is right etc
4.	Tick all of the Filters- Current, Future, and Past- and click on the 'Refresh List' button • If the student has never been attached to a supervisor/ advisor, the Academic Advisors section will remain blank • If the student only has Current advisors, the list in the Academic Advisors section won't change • If the student has had any supervisors/ advisors allocated to them in the past or have supervisors/ advisors with a Start Date in the future, the list in the Academic Advisors section will now have a larger number of rows Having all of the Filters ticked will give you a better overview of the student's supervisor/ advisor history.

5.	To close the link between a student and a supervisor/ advisor: • Look at the Academic Advisors section of the page and find the User Role row that you wish to close the link for • Enter a date in the End Date field If you are closing a link to attach a new one, please bear in mind that the Start Date of the new attachment must be the first day of term: • 1st October for Michaelmas Term (MT) • 5th January for Lent Term (LT) • 17th April (10th April in a Leap Year) for Easter Term (ET) This should be taken into consideration when entering an End Date- the End Date of the old link should be before the Start Date of the new link without leaving a gap between the two dates.
6.	If you are closing the link between PS and student (in order to add a new one): • As well as entering an End Date, please also remove the tick in the Primary column o The tick should then be added to the new PS-student attachment Only the active PS should have a tick showing in the Primary column.
7.	Click on the '**Save**' button at the bottom of the page to save the changes that you've made.

d) When a supervisor/ advisor is attached to a student in error

The procedure below should only be used if a supervisor/ advisor has been linked to a student in error. We delete the whole attachment, rather than close it, because the student should never have been linked with the given supervisor/ advisor.

If your intention is to record the fact that a student's link to a particular supervisor/ advisor has come to an end, please use the Section 3 procedure instead.

Steps	Action
1.	**Navigate to: NavBar (the compass icon)> Navigator> Records and Enrolment> Student Background Information> Maintain Student Advisors** • Enter at least one of the key identifiers (USN, CRSid, or Name) for the student that you wish to add User Roles to • Click 'Search' If you are new to the Maintain Student Advisors page, please refer to Appendix A for an overview.
2.	CRSids and USNs are unique to each person- if you search for a student using their USN or CRSid you should be taken straight to their Maintain Student Advisors page • The exception to this is if the student has more than one course of study within an Academic Career, eg. if a student has completed a MPhil and is now studying for a NOTAF, they will have PGRD row for the MPhil and a second PGRD row for the NOTAF. • Take care to select the row corresponding to the course of study (Academic Programme) that you wish to amend for the student. If you search by Name only, you may be presented with a number of Search results to pick from- take care to pick the right student.
3.	To delete a student-supervisor/ advisor link made in error: • Look at the Academic Advisors section of the page and find the User Role row that you wish to remove/ delete • Click on the minus '-' icon at the end of that row • A message box will appear asking that you confirm that you wish to delete the row o Click 'Ok' to confirm the deletion • A second message box will appear asking you again to confirm the action o Click 'Ok' to delete the row ▪ The row will no longer show If you, at this point, realise that the wrong row, for example, has been removed- don't click Save. Click on the 'Return to Search' button and when the message box appears asking "Do you want to save your changes?" click on 'No'. Go back on to the student's Maintain Student Advisors page and the row will still show (as the deletion wasn't saved).
4.	When you are happy that the right row has been removed, click on the '**Save**' button at the bottom of the page to save the changes that you've made.

Contacts for further assistance

Supervisor is not available on look-up	Contact the Student Registry recordsandexams@admin.cam.ac.uk
I can't view the pages in CamSIS	Contact the CamSIS service desk camsishelp@uis.cam.ac.uk
I can't view a student in CamSIS	Contact the CamSIS service desk recordsandexams@admin.cam.ac.uk
I don't know which page to use	Contact the Student Registry recordsandexams@admin.cam.ac.uk

Appendix A- Overview of the Maintain Student Advisors page

This page is found at: **NavBar (the compass icon)> Navigator> Records and Enrolment> Student Background Information> Maintain Student Advisors**

The page has three sections:

- **Student details**– This is for information only; you can't edit these details here. If there are any errors in this section, please contact the Student Registry.

- **Filter**– The default for this section is 'Current'; only the student's current Academic Advisors will show in the bottom section of the page. They will have a User Role Start Date in the past but no End Date, for the role, entered
  - o If you wish to only view Advisors that were assigned to the student in the past, un-tick the 'Current' box, tick the 'Past' box and 'Refresh List'- you will now only see the Advisors with an End Date for the User Role

  - o If you wish to only view Advisors that have a User Role Start Date in the future, un-tick the 'Current' box, tick the 'Future' box and 'Refresh List'- you will now only see the Advisors with a Start Date in the future

  - o To view all Advisors ever assigned to the student, tick all three options (Current, Future, and Past) and click 'Refresh List'

- **Academic Advisors**– The User Roles attached to the student are listed in this section; you can change whether you are viewing Current/ Past/ Future/ All by using the tick boxes in the Filter section. You will be able to amend supervisor roles here but you will not be able to edit College advisors- only colleges can do this.

- o In the **Advisor Details** column of this section you will see a **'View'** button against each of the Advisors. This button is a quick-link to the **User Role Maintenance** page (see [Appendix B](#) for further information) where you can view all of the Advisor's roles across all of the Departments/ Faculties/ Colleges that they are affiliated with; it also lists all of the students that they are linked with and in what role.

Appendix B- Overview of the User Role Maintenance page

This page is found at: **NavBar (the compass icon)> Navigator> People Tools> Security> User Profiles> User Role Maintenance**

The page gives the key identifiers of the individual that you have searched for (specifically USN, Name, and CRSid), and then has two main sections; each section can be broken down into a filter section and a list section:

1. **User Roles**

- **User Roles Filter**– This section allows you to filter the information that you see in the User Role section for the named individual.
  - As a default, the filter will be set to show 'Current', 'Future', and 'Past' roles for all Acad Orgs (Academic Organisations), and all User Roles.
  - You can amend the filter as required (by ticking or un-ticking the respective box(es)) to view just the Current roles, or the Current and Past roles etc, and then clicking the 'Refresh List' button.
  - If you are responsible for maintaining User Roles for more than one Acad Org, you can use the drop-down menu to filter the User Role list by one particular Acad Org and then clicking the 'Refresh List' button.
  - If you are interested in only viewing a particular User Role for an individual (eg. Principal Supervisor), you can filter the list by selecting the Role from the drop-down list and clicking on the 'Refresh List' button.

- **User Role**– a list of the roles that the advisor/ supervisor is approved to undertake. You can amend the list using the filters as mentioned above.
  - Although you can see all the roles that an individual has, you can only edit the roles associated with your own organisation.

- Roles associated with other Acad Orgs are read-only- you won't be able to amend the Role Start Date, there won't be a Role End Date field, and there won't be a minus '-' icon at the end of the row.
  - The **Students** column shows the total number of students assigned to the individual in a given User Role at the Acad Org listed in the **Description** column.

2. Student Responsibilities

- **Student Responsibilities Filter**- These filters control the list of students viewable in the lower User Role section.
  The default for this section is 'Current'; only those that have a current/ active link to the supervisor/ advisor will show in the lower User Role section. Each row will have a User Role Start Date in the past but no End Date, for the role, entered.

  - If you wish to only view students that were assigned to the supervisor/ advisor in the past, un-tick the 'Current' box, tick the 'Past' box and 'Refresh List'- you will now only see the students with an End Date for the User Role

  - If you wish to only view students that have a User Role Start Date in the future (ie. it's August and you want to view who students starting in the upcoming Michaelmas Term are assigned to), un-tick the 'Current' box, tick the 'Future' box and 'Refresh List'- you will now only see the students with a Start Date in the future.

  - To view all students ever assigned to the supervisor/ advisor, tick all three options (Current, Future, and Past) and click 'Refresh List'

  There is also the option to filter the User Role section by Acad Org (if you are associated with more than one Acad Org), or by the User Role (eg. Principal Supervisor) by selecting the appropriate option from the drop-down menu- again, clicking the 'Refresh List' button will refresh the list shown in the User Role section.

- **Student Responsibilities User Role**- This section shows the students linked to the supervisor/ advisor at your Acad Org(s); you will not be able to see students associated with the supervisor/ advisor based in Acad Org(s) that you are not affiliated with.

  - In this section you can add and close student- supervisor/ advisor links

  The '**View**' button that shows to the left of the '**Student USN**' column is a quick-link to the student's **Maintain Student Advisors** page (see Appendix A for further information).