CamCORS

Cambridge Colleges' Online Reports for Supervisions

Version 4

Manual for College Offices

February 22, 2006

Contents

1 Introduction

1.1 CamCORS

CamCORS, Cambridge Colleges' Online Reports for Supervisions, is a system that allows supervision reports to be read, written, and processed online. Supervisors are asked to create report forms for each of their students at the beginning of term, and to write them up as soon as practical after each supervision[1], and submit them to Colleges on the completion of supervisions for the term. In more detail, the procedure is as follows:

- A supervisor creates a report form for a student as soon as the supervision arrangements have been made. This enables College users (*e.g.* Directors of Studies and College Offices) to check the supervision arrangements. They can also communicate by e-mail with the supervisors, students, or any other parties involved in the arrangement.

- After giving a course of supervisions to a student, the supervisor completes the report and submits it at least on a termly basis. The report is immediately visible to the student's Tutor(s) and Director(s) of Studies, as well as the Senior Tutor of their College. It may also be visible, on creation of the report form, to the student, and the text visible immediately upon submission, depending on the way the College has configured the system. More usually it will be released to the Student after the end of Term interview with the Director of Studies or Tutor.

- The student's Director of Studies and the Senior Tutor, or the College Office acting on their behalf, read the report, may add comments and decide whether to approve or refuse its payment and its release to the student (if the College has so configured the system.) If they see a problem, they may also return it to the supervisor for resubmission.

- When a report has been both submitted and approved, the College Office can process its payment. CamCORS produces an export file for this purpose, which is intended for use with the Colleges' existing payment systems.

In order to use CamCORS, you will need

a computer with Internet access, and

a web browser which supports tables and secure connections over SSL. (Modern browsers routinely support secure connections; a reasonably recent Windows, Linux or Macintosh machine should come with an appropriate browser[2].)

The checklist for Cambridge-specific permissions you will need is as follows (the jargon is explained in the next section of this manual):

---

[1] so that the memory is still fresh, and so that tutorial problems may be spotted promptly.
[2] CamCORS makes light use of Javascript, and it will operate if Javascript is unavailable.

- Get a CRSid

- Get a Raven password

- Make sure your @cam.ac.uk email address works[3]

- Get your CamCORS roles enabled

You do not have to be within Cambridge, or have a computer in the `cam.ac.uk` domain, to use CamCORS—it may be accessed with safety from anywhere on the Internet.

1.2 Usage notes

Although CamCORS is in place throughout the University, it is up to individual Colleges to decide exactly how it is to be used. In particular, you will need to decide upon the division of responsibility between tutorial office and accounts staff. CamCORS has only four levels of access for College users: 'Student', 'Director of Studies / Tutor', 'Senior Tutor', and 'College Office'. Many of CamCORS' administrative operations are available only to users entered into the system as a 'College Office' user; a member of staff using any of these functions will require full College Office level access to CamCORS (See section 2.1 for more about College user roles.)

For example, you may decide that finance staff are solely responsible for managing the payment of supervisors; they will thus require 'College Office' access on CamCORS even if this is the only function they use.

See Sections 2.8 or 4.2 for details of how to assign roles to new CamCORS users.

---

[3]if you have any role other than supervisor

2 CamCORS users

2.1 Introduction

CamCORS uses the University Computing Service's Raven system for managing passwords, authentication and logging in. Once a user has logged in, CamCORS determines which facilities the user should be able to access (*e.g.,* reading a report, authorising a report for payment).

All users of CamCORS will need first to acquire a Raven account (that is, a username and password acceptable to Raven). Such accounts are created as a matter of routine for undergraduates and University staff, so you may well already have one; some people might not have a Raven account, such as College supervisors who are neither graduate students nor fellows; such people should contact the University Computing Service[1].

2.2 CRSids

The username by which CamCORS and Raven know you is your CRSid, *e.g.,* 'mk270'. CRSids are assigned by the Computing Service for all their services, and are also used throughout CamCORS. Many colleges and departments use them as well. CRSids tend to comprise one's initials and a few digits. If you have an e-mail address ending in @cam.ac.uk, @hermes.cam.ac.uk, or @cus.cam.ac.uk, the portion preceding the @ is your CRSid, which will also be your username on CamCORS and Raven. If your e-mail address is something of the form @xxx.cam.ac.uk, where xxx is some other name (*e.g.* esc, mole.bio, etc.) then the username may not be a true CRSid. Check with your Computer Officer if you are in doubt.

If you do not have a CRSid, you will need to apply for one using a copy of the form available for download at http://www.cam.ac.uk/cs/form1.pdf. Once you have filled in the form, you should send it to the College Office or Course Director in the College or Department that has asked you to supervise.

2.3 Raven

CamCORS has a slightly round-about method for logging in. To use CamCORS, you actually need to be logged into a separate system, called Raven. Raven just deals with usernames and passwords, on behalf of CamCORS and a growing number of other University websites[2]. Raven lets CamCORS know what your username is, and CamCORS determines your access level accordingly.

In practice, the process of logging in is quite smooth: following the link to log in to CamCORS will divert your web browser to the Raven website, where you must enter your username and password. On success, you will be taken to the main CamCORS

---

[1]See http://www.cam.ac.uk/cs/docs/faq/n5.html
[2]such as the Board of Graduate Studies' online presence

page. It is nevertheless important to know the role played by Raven, for at least two reasons: knowing whom to contact to get a new password, and understanding the effect of sharing a computer with someone else.

Raven accounts are nowadays created for new members of the University as a matter of course. If you do not have a Raven account, or do not know what its password is, see the advice at http://www.cam.ac.uk/cs/docs/faq/n5.html; note that reissue of Raven passwords can take a day or two as in some circumstances the new password is sent via post.

Raven relies on your web browser accepting cookies; contemporary browsers have sophisticated facilities for *blocking* cookies, and can do so on a per-website basis. If you have trouble logging in, you should verify that your browser is accepting cookies from both the CamCORS and the Raven websites.

Technically, Raven authenticates a particular web browser to CamCORS. If you use two web browsers (*e.g.*, Internet Explorer and Firefox) on your computer at the same time, they will access CamCORS independently of each other. Where computers are shared, for example in a communal area, if two people try to use the same web browser at slightly different times to access CamCORS, the first must log out properly (from both CamCORS and Raven), lest the second gain access to information to which he or she is unauthorised. In practice, the second user may try to access CamCORS through a bookmark or favourite which attempts to access part of CamCORS relating to one of his or her roles, and is presented with a message to the effect that the previous user is unauthorised to do this: "You have successfully authenticated as 'apt1002' but you do not have a CamCORS account for the role that you are trying to use." This is harmless, and a list of the appropriate roles is provided to rectify the situation.

Changing your password

The password you use when you access CamCORS is your Raven password. To change it, go to https://raven.cam.ac.uk/auth/account/ and follow the instructions. To have it changed on your behalf because you have forgotten it, you should consult the Computing Service Helpdesk[3]. The password change will affect all other sites you use which use Raven for authentication.

2.4   Roles in CamCORS

CamCORS is designed to reflect the fact that many people in the University wear several hats. CamCORS' less colloquial term for this phenomenon is "roles". Senior Tutors may well supervise undergraduates, and Bursars may also be Directors of Studies. Moreover, these activities may be conducted in respect of different colleges. Accordingly, for each hat you wear within the University's supervision arrangements, you should have a distinct "role" within CamCORS, such as "Senior Tutor at Jesus College".

Users with multiple roles will have to select the role they wish to exercise from a list upon logging in; each role has its own main menu of options, and this main menu always permits a return to the role list so that the user may change to a different role without logging out. In some cases, changing role is mandatory simply to be presented with

---

[3]See http://www.cam.ac.uk/cs/docs/faq/n6.html

access to the desired facilities—the Bursar who supervises undergraduates must change from his supervisor role to his college official role to administer bank payments.

CamCORS does not ordinarily present users with options they are unauthorised to exercise, so as a user you need not worry about accidentally doing something you are not supposed to be allowed to do. The exception is that the College Office role combines several different types of responsibility, and may be shared by, for example, Bursars and accounts clerks; accordingly, access to a facility available to a College Officer does not imply authorisation to use it. [4]

CamCORS associates one or more roles with your account. The roles of Senior Tutor, Director of Studies / Tutor, (or indeed, Student) are assigned by the College Office. A fellow who is the Director of Studies for the same subject in his own college as well as another must be granted the appropriate status within CamCORS separately by each college's College Office; he would have one role for each "hat", and these would be displayed separately when he logged in.

Each type of role is granted to your account by a particular authority. Supervisor roles are granted by the Computing Service. The roles of Student, Senior Tutor, Director of Studies, and Tutor are granted by the College Office[5] (of the college of the students in question, which might not be the college of the user). The role of Course Director is granted by the CamCORS Management Committee[6] on the advice of faculties, but pursuant to policies set by the Colleges.

The roles of Student, Senior Tutor, Director of Studies, Tutor and College Office, when associated with a particular user's account, are always roles in relation to a *particular* college; a given CamCORS user may for instance be Director of Studies at New Hall and possess the College Office role in respect of Queens'. (CamCORS only forbids students to be associated with multiple colleges).

One of the persons with College Office access within CamCORS can usually be contacted by emailing `supervisions@college.cam.ac.uk`, where `college` is replaced by the internet address of the college—these are not always guessable, so check http://www.camcors.cam.ac.uk/contact/ if you are unsure.

Supervisor roles are administered centrally, by the University Computing Service. They afford supervisors the access necessary to create, write, and submit reports, and also to manage their own payment details. Supervisors may also view and print out or archive any reports that they have written, for students at any College.

The role known as Course Director covers persons carrying on, within the context of a faculty or department rather than a college, the allocation of supervisors to students; the role is appropriate for teaching officers responsible for organising supervisions for all University students taking a particular paper, and expected examples include the more specialised courses in the final year of the Physics Tripos and teaching officers associated with the theological colleges.

---

[4]In the unlikely event that you *are* presented with options suggesting actions clearly outside your area of responsibility, please notify your College Office or the CamCORS Management Committee.

[5]indeed, users with College Office access can grant that level of access to other users, too

[6]that role in turn may be granted by technicians the Management Information Systems Division of the Old Schools

College roles

College roles allow one to search for, view, and process reports relating to students at an individual College.

There are several *roles* available to users, which correspond to different levels of privilege on the system. Role names are meant merely as a reminder of their capabilities. Different Colleges administer supervisions in different ways, and the decision as to which level of access to grant to any College user must be made on the basis of the privileges they require.

Student users may use CamCORS only to read reports to which they have been granted access, and to check that report forms have been created before submission (including using the e-mail links provided on the report forms.)

Director of Studies/Tutor users may read reports submitted about the students for whom they have responsibility, and (if the College allows it) release processed reports to be viewed by the students, or return the report to the supervisor for correction. A person with a DoS/Tutor role may also approve or refuse payment for reports about students for whom they act as Director of Studies, although some Colleges may configure CamCORS so as to restrict payment decisions to the Senior Tutor and College Office. Directors of Studies and Tutors share the same level of *general* privilege on CamCORS, since a user may act as Director of Studies to one set of students and as Tutor to another. Each student has a list of Directors of Studies and Tutors as part of their Student Record, and CamCORS consults this to determine which actions can be taken for which student.

Senior Tutor users may read reports submitted about the students for whom they have responsibility, and (if the College allows it) release processed reports to be viewed by the students. They may also approve or refuse payment for reports about all such students, return reports to supervisors, or undo payment decisions.

College Office users are permitted to perform all these functions, in addition to various other administrative tasks. Only those with College Office access can create new College users or create or edit Student Records.

If you act in several capacities for a single College, you should be given the most powerful role that you will require, *i.e.* the one that appears last in the above list. So, for example, if a Senior Tutor also acts as Director of Studies for a number of students at their College, they will be provided with a Senior Tutor role at that College. See Sections 2.8 and 4.2 for details of how to create College users.

2.5 Your account on CamCORS

As a supervisor, you may specify any e-mail address in your personal details which other users may use to contact you. However, e-mail links within CamCORS to all those with College roles (*i.e.* Senior Tutor, Tutor, Director of Studies, and Student) assume e-mail addresses of the form `crsid@cam.ac.uk`.

Any e-mail sent through CamCORS to you in a College role will be sent to the address `crsid@cam.ac.uk`. If you prefer to use a different account as your

primary e-mail address, you should set Hermes[7] up to forward all mail sent to `crsid@cam.ac.uk` to your usual account. See the Computing Service's leaflet IS12 (available at http://www.cam.ac.uk/cs/docs/infosheets/is12/) for details of how to set up mail forwarding. This is necessary even if you have a Supervisor account for which you have elected to use a non-`@cam.ac.uk` e-mail address.

The College Office role can only be associated with your account by someone who already has College Office status at your College, using the Point edit User Accounts facility (Section 2.8.) If you have any other role in CamCORS, *e.g.* as supervisor, or as a College Officer/Director of Studies/Tutor at another College, you will retain your separate account for that purpose. Consult the relevant **Manual** for details.

2.6   Logging in

CamCORS' home page is located at http://www.camcors.cam.ac.uk/. This page is used by the administrators of CamCORS to bring important information to your attention (*e.g.* concerning service interruptions owing to maintenance). We recommend that you bookmark this page, rather than the log-in page, or at least consult it regularly. The home page also contains convenient links to the on-line version of this manual, and to the CamCORS FAQs (Frequently Asked Questions.) The CamCORS log-in page can be accessed through the 'login' link from the home page, or directly at https://camcors.cam.ac.uk/camcors/ (note http*s*.)

When you attempt to log in to CamCORS, CamCORS checks whether you are logged into Raven (without which, CamCORS cannot identify which particular person you are). If you are not logged into Raven, you will first be diverted to Raven and requested to log in.

If you are logged into Raven properly, then CamCORS will ask you which role you wish to adopt; if you have only one role within CamCORS (*e.g.,* you are a student), this screen will automatically pass by, but it may be visible for a split-second.

Once a role has been selected (by clicking or automatically), CamCORS will display its Main screen.

This consists of two sections:

a summary table showing the current state of all the reports for which you have responsibility, and

the main menu, allowing you to perform all the actions appropriate to your User Role.

The summary table

This table contains at-a-glance information on the progress of reports for students at your College.

The columns refer to the progress of each report through the system:

Created The supervisor has created the report, but has not yet submitted it.

Submitted The report has been submitted for your consideration, and you may read it and add comments on the Report Search and Selection page (Section 3.1.) You may

---

[7]or whichever other system is appropriate

also make or undo a payment decision; return it to the supervisor; or release it for viewing by the student.

Approved The report has been read by an appropriate College authority (the student's Director of Studies or Senior Tutor) and approved for payment.

Refused The report has been read by an appropriate College authority and payment has been refused.

Processed As a result of the approval of your College, the report has been passed on from CamCORS to the College's finance system. CamCORS does not handle the actual process of paying supervisors.

Each of the five states in this table is independent, thus the total of all cells is also the total number of reports created for students for whom you are (or have been) responsible.

CamCORS' main page contains a summary table, with at-a-glance information on the progress of reports for which you have responsibility.

The main menu

Each role within CamCORS has a main menu. You can reach the main menu of another role you possess by selecting Change role.

The options available to you on the main menu are as follows:

View or process supervision reports Choose this option to search for and read reports which have been submitted about students at your College (Section 3.1.)

View supervision arrangements Choose this option to check the supervision arrangements which are in place for students at your College (Section 3.11.)

View Supervision Costs by DoS Choose this option to display current or historical statistical information on the costs of supervisions associated with particular Directors of Studies (Section 3.12).

Bulk create User Accounts Choose this option to import into CamCORS a new User Account file for your College, or to export the current data from CamCORS (Section 4.2.)

Point edit User Accounts Choose this option to create or edit single user accounts (Section 2.8.)

Bulk create Student Records Choose this option to import into CamCORS a Student Record file, or to export the current data from CamCORS (Section 4.3.)

Point edit Student Records Choose this option to create or edit the Record of a single student (Section 2.9.)

Manage Supervisor Payment Data Choose this option to obtain information about processed reports, so that supervisors can be paid for them. Also choose this option if you want to mark all pending reports as processed (Section 4.5.)

List Payments Due from other colleges College Fellows, or others on a College payroll, may elect to have payments made directly to their College for supervisions that they give. This option enables the College Office to track any payments due to your College from other Colleges, in respect of supervisions given by Fellows of your College. (Section 4.6.)

View statistical information Choose this for viewing and exporting statistics. (Section 3.14.)

Configure college-wide preferences Choose this option to set a number of configuration options specific to your College (Section 2.10.)

Change role Exercise a different role.

Log out of CamCORS Use this option to end your session with CamCORS (Section 2.7.)

2.7 Logging out

Remember to log out when you have finished, especially if you are using a machine to which others have access. Note that you should log out of Raven as well as CamCORS. (The data in CamCORS is subject to Data Protection legislation, and you should seek to keep it secure.)

You may log out either using the Log out of CamCORS option on the main menu, or by clicking on the Log out link at the top right of most pages.

If you want to switch from a College role to a supervisor role, or vice versa, you use the Change role option from the main menu. You do not however need to log out of CamCORS or Raven to achieve this.

Automatic logout

If you have worked on a single page for more than 90 minutes without performing any action which communicates with the server, you may find that you have been automatically logged out when you do try to perform the next action (*e.g.* saving changes.) You will see a different login page from the one which appears at the start of a new session. You will *not* lose any work if you log in again straight away, but you *must not* do anything other than log back in. CamCORS keeps track of what you were trying to do, so that after you log back in you will be taken directly to the relevant confirmation page so that you can carry out the action you wanted to perform. Nevertheless, you should ensure you save your work as you go along, and if interrupted, before you move on to another task.

It may occur that you decide to log out after a long break. In this case, because your session will have expired, CamCORS will present you with a login screen, because it needs you to log in before it knows you are entitled to log yourself out. At this point, you need not log in again if you do not want to.

2.8 Editing user accounts

College Office account holders are able to create new user accounts for other College Office personnel, Directors of Studies, Tutors, Senior Tutors and students. They can also

edit existing accounts, changing such details as the names, titles and roles of users, and whether accounts are enabled for login or not. (Other information about students, such as details of subjects being studied, are part of the Student Record; see section 2.9.)

If you want to create or alter a large number of accounts, it may be easier to export the entire College list, edit, and re-import using the Bulk create User Accounts facility (Section 4.2.)

Point Edit User Accounts

To create or edit a single College account, select the Point edit User Accounts option on the main menu. This option allows you to change the status of particular users, *e.g.*, make a newly-promoted fellow a Tutor.

The CamCORS jargon term "User Account" connotes the role a particular person has within a specific college. It is a slightly awkward relic of earlier versions of the CamCORS system.

A College Office can only specify roles for users in respect of its own college. The Director of Studies for students at two colleges must be recorded as such individually by their respective College Offices, using either this menu option or the bulk creation system.

If you are changing the details of an existing user, enter their CRSid in the box and click the Find button. The form will be returned to you with the currently-held details filled in. If you enter an unrecognised CRSid, you will be shown an error message; ensure you have entered the CRSid correctly and click Find again. If you are adding a new user, fill in the new CRSid together with the rest of the details.

The fields available are

CRSid The CRSid of the user, as issued by the Computing Service. This acts as a unique identifier, and cannot be edited nor removed after it has been imported into Cam-CORS (but see Section 2.8, 'Removing user accounts created in error'.)

Title (*e.g.* Mr, Ms, Dr, Prof, etc.)

Preferred name (or initials) The user's name as it is to appear on the report form. Colleges may prefer to give initials in this space.

Surname The user's surname.

Sex The user's sex.

Role One of the following College *roles*:

    Student users may use CamCORS only to read reports about themselves to which they have been granted access, and to check that report forms have been created before submission (including using the e-mail links provided on the report forms.)

    Director of Studies/Tutor account holders may read reports submitted about the students for whom they have responsibility, and (if the College allows it) release processed reports to be viewed by the students, or return the report to the supervisor for correction. A person with a DoS/Tutor account may also approve or refuse payment for reports about students for whom they act as

Director of Studies, although some Colleges may configure CamCORS so as to restrict payment decisions to the Senior Tutor and College Office. Directors of Studies and Tutors share the same level of *general* privilege on CamCORS, since a user may act as Director of Studies to one set of students and as Tutor to another. Each student has a list of Directors of Studies and Tutors as part of their Student Record, and CamCORS consults this to determine which actions can be taken for which student.

Senior Tutor account holders may read reports submitted about the students for whom they have responsibility, and release processed reports to be viewed by the students. They may also approve or refuse payment for reports about all such students, return reports to supervisors, or undo payment decisions.

College Office staff Those given College Office accounts have full control over their college's data in the system. This is the highest level of privilege available within a College.

Users with multiple roles should be given the most powerful role that they require, *i.e.* the one that appears last in the above list. So, for example, if the Senior Tutor also acts as Director of Studies for a number of students, they should use Senior Tutor as their role. Senior Tutors may in practice prefer to be entered as College Office users, since the College Office role confers the same privileges regarding viewing of reports, but also has additional facilities for processing reports and configuring the system.

College-defined Group *Optionally*, the name of a College-defined Group to which the user belongs. The College-defined Group is a label internal to CamCORS, consisting of any string up to 20 characters long. It is intended to be used to store, for example, the current year of a student's course, although Colleges are free to use it for any purpose they require. College users (apart from Student users) may then search by College-defined Group from the Report Search and Selection page (Section 3.3.) When creating or editing a single account, a 'College-defined Group' box is provided, so that groups of users may be more easily identified.

Account is enabled for login Ensure this box is checked if you wish the user to be able to log in to their account. An account may be disabled at any time if you no longer wish a user to be able to log in, and re-enabled at any subsequent time.

Once you have filled in all the areas, click Save Changes to create or alter the account.

Removing user accounts created in error

Occasionally you may discover that an incorrect CRSid has been entered into the database, either through a clerical error, or after being mishandled by Microsoft Excel (see Section 4.1.) When this happens, the incorrect account should be deleted.

If a user *changes* their CRSid, the old account should *not* be deleted, since the CRSid was once valid for them; supervision reports already in the database correctly refer to the original CRSid. The Computing Service intends that CRSids, once assigned to a person, will never be reassigned to anyone else. This means that, strictly speaking, no user ever *changes* their CRSid, but merely obtains a *new* CRSid that they prefer to use.

To delete a single account from your College's database:

- Choose <u>Point edit User Accounts</u> from the main menu.

- Enter the incorrect CRSid in the box, and click <u>Find</u>. The user's other details will appear in the remaining boxes; you should check that these correspond to the user you wish to delete.

- In the box at the bottom of the page, type the exact string `THIS ACCOUNT WAS CREATED IN ERROR`.

- Click <u>Delete</u>. The account will be immediately deleted, so check its details thoroughly.

You can only delete College accounts one at a time.

(In order to provide a guaranteed audit trail, deleting a College user account does not in fact remove it from the database entirely. However, from the point of view of any user of CamCORS, it will appear that the account has been permanently removed; in particular, new user accounts with the same CRSid may now be created. The old record is only available to the central administration of CamCORS by querying the database directly.)

2.9   Editing student records

Just as you can edit the account details of an individual user from the <u>Point edit User Accounts</u> screen, so you can also update an individual user's Student Record by choosing the <u>Point edit Student Record</u> option from the main menu.

The Student Record links each student with the Triposes in which they are expecting to be supervised. It also tells CamCORS who their Director(s) of Studies and Tutor(s) are. A student is both the subject of reports and a user of the system: if you do not create a Student Record for each student, specifying the correct Tripos (H01) codes, supervisors will not be able to write reports about them.

Note that CamCORS is a supervision reporting system, *not* an examination entry system. Associating a Tripos with a student in CamCORS merely enables supervisors in that Tripos to write reports about them; it does not matter whether the student intends to take the examination, nor does it have the effect of entering a student for any exam.

If you want to create or alter a large number of records, it may be easier to create a CSV file and import it into CamCORS using the <u>Bulk create Student Records</u> facility (Section 4.3.)

Point Edit Student Records

To create or edit a single Student Record, select the <u>Point edit Student Records</u> option on the main menu. You can only create a Student Record for a student who already has a User Account (whether disabled or enabled) on the system.

If you are changing the details of an existing user, enter their CRSid in the 'CRSid of student' box and click the <u>Find</u> button. The form will be returned to you with the currently-held details filled in. If you enter a CRSid which does not correspond to a user at your College, you will be shown an error message. You should either correct the CRSid (if mistyped) and click <u>Find</u> again, or create a User Account for the user using the <u>Point</u>

13

edit User Accounts facility (Section 2.8.) If you are creating a new Student Record, fill in the new CRSid together with the rest of the details. When filling in CRSids, remember that a CRSid corresponds only to the part of a student's e-mail address before the @ symbol; it does *not* include the @cam.ac.uk or similar part.

The fields available are

CRSid of student as issued by the Computing Service.

CRSids of DsOS Zero or more CRSids corresponding to the student's Director(s) of Studies.

CRSids of Tutors Zero or more CRSids corresponding to the student's Tutors.

> Directors of Studies can view any report for a student for whom they have responsibility. They can also approve them for payment (subject to a College configuration option; see section 2.10,) comment on them, and release them for viewing by the student. Tutors can do all of the above except approving payments. Directors of Studies and Tutors share the same level of *general* privilege on CamCORS, since a user may act as Director of Studies to one set of students and as Tutor to another. These two lists are consulted by CamCORS to determine which actions can be taken for which student.

Exam codes (H01) Zero or more University Examination codes (H01 codes), one on each line. (H01 codes are available online at http://www.admin.cam.ac.uk/offices/students/codes/h01.html.)

> Ensure that you include the H01 Code for all Tripos Parts from which a student is taking papers, including Diplomas and Certificates. Include also exemptions for medics and vets. There is no limit to the number of H01 Codes you can include. If no H01 codes are included, supervisors will not be able to create reports for this student.

If a student degrades, you should leave the record complete until supervisors who have seen the student have had a chance to report. Later, but in any case before the start of the first term in which the student will not be receiving supervision, you should remove the H01 codes. It is advisable to retain information about the student's Directors of Studies and Tutors, so that they will still have access to any pending reports.

When a student graduates, or leaves the University for any reason, you should clear all three fields.

2.10 Configuring CamCORS for individual Colleges

There are five configuration options that control how CamCORS behaves for your College. These may be altered by choosing the Configure college-wide preferences option on the main menu. Click Save Changes when you are done.

Student viewing of reports. All students with enabled User Accounts, who have been given a password for CamCORS, can use the system to read their supervision reports. The ST/DsOS/Tutors choose when students can see reports option determines *when* they can read these reports. If this box is checked, either the Senior

Tutor, or one of the student's Directors of Studies or Tutors, must release the report before it can be viewed (see Section 3.7). If the box is left unchecked, students will be able to see reports as soon as the supervisor submits them.

Changing this setting only affects the viewing status of *new* reports. Thus, if you uncheck this box, reports which have already been submitted may still need to be released.

Photograph availability. If your College would like a student's photograph to be displayed with their report on the 'Report viewing and processing' page (Section 3.3), check Student photographs may be displayed on report forms. If the box is unchecked, the photographs will not be visible. Photographs are *not* part of the report, and will not be included when reports are printed or saved.

Directors of Studies' approval of payments. If your College wishes Directors of Studies to be able to approve and refuse payment for reports, in addition to the Senior Tutor and College Officers, check Directors of Studies may approve and refuse payment. If this box is unchecked, only those CamCORS users with a Role of Senior Tutor or College Office may make payment decisions.

College Offices may choose to allow, or not to allow, payment decisions to be made by Directors of Studies.

Access for Course Directors This option determines whether the CamCORS Management Committee (CMC) can authorise Course Directors to see information from reports written about students at this college. If the "The CMC may authorise Course Directors to see report summary information" checkbox is checked, Course Directors authorised by the CMC will be able to see report header information (e.g. student and supervisor names, the subject taught and the term) and also the date of report submission, if any. If the checkbox is not checked, Course Directors will know that this information is being withheld. Further information about Course Director access to CamCORS is available from the CMC.

Full Access for Course Directors This option determines whether the CMC can authorise Course Directors to see the full text of reports written about students at this college. If the "The CMC may authorise Course Directors to see the full text of reports" checkbox is checked, Course Directors so authorised by the CMC will be able to see the full text of reports, including ratings and attendance (i.e. the same information that is available to the student). This option has no effect unless the previous checkbox is also checked. Decisions on Full Access are taken by the Senior Tutors' Standing Committee on Education; the CMC acts on their behalf.

3   Viewing and processing reports

To see the reports, click on <u>View or process reports</u> on the main menu. The 'Report Search and Selection' page will be displayed.

This page contains a large search form; below it, a summary of reports for the current term (or, if during the vacation, for the term that has just ended); and, at the bottom, a panel of Actions you may perform on selected reports.

Instead of showing all reports at once, CamCORS has a 'Report Search and Selection' page, where you can choose which reports to view or process from a summary list.

If there are no reports available to you in the current term, only the 'Report Search' section of the page is visible. You may search for other reports by altering the search criteria (see below.)

The 'Action' panel at the bottom of this window contains various actions which may be performed on sets of selected reports. The top line of this panel allows you to view, save (Section 3.3) and print (Section 3.9) the reports. There is also a button allowing you to send e-mail to various people connected with the current report selection (Section 3.10.)

The remaining buttons on the panel provide various report-processing facilities: making payment decisions (Section 3.4), releasing reports for viewing by students (Section 3.7), returning incorrectly-submitted reports to supervisors (Section 3.8), and undoing payment decisions (Section 3.5.) These facilities are provided primarily for the benefit of Directors of Studies, Tutors and Senior Tutors. They are made available to the College Office for use on those occasions when the intended users have delegated this task to the College (*e.g.* because of illness, or problems with access to the system.) The last button, <u>Mark as processed for payment</u>, prepares data for export to the College's financial system (Section 4.5.)

3.1   Searching for reports

To search through the available reports, enter into the appropriate boxes the information you know. Leave blank any field which you want to be able to vary. In the case of the two date boxes and XRNLI number, anything which is not a valid date or XRNLI number will be ignored. In the text boxes, you may also search for values *beginning* with a certain string of letters or words.

The available fields are:

Student *Either* the first name or the surname of a student, or some letters from the beginning of one or other of these names. For example, 'Smith' would find reports about Mr. Smithers as well as Miss Smith. Use surnames if possible, since some first names have unusual contractions (searching for 'Tony' will not find any Antho-

nys, nor 'Peggy', any Margarets.) Be careful also to distinguish names beginning 'Mac...' from those entered as 'Mc...'. Some Colleges may use initials rather than a preferred name.

If you are unsure about the spelling of a student's name, use the *CRSid* field instead.

CRSid The CRSid of the student. You can find out CRSids from names (including like-sounding names) using the University e-mail search at http://www.cam.ac.uk/global/search/. Note that this database *only* contains the CRSids of those who have consented to their details being made public. A separate box is provided for searching through reports by CRSid.

Supervisor The first name or the surname of a supervisor.

CRSid The CRSid of the supervisor.

DOS or Tutor The identity of one of the student's Director(s) of Studies and Tutor(s). Choose 'DOS' or 'Tutor' from the first list, as appropriate, and their name from the second. Note that CamCORS generates the second list automatically: it contains the names of everyone with a College user account (except for students.) If somebody appears on this list, it does not necessarily follow that they act as DOS or Tutor to any student.

College-defined Group The name of a College-defined Group to which the student belongs. The College-defined Group is a label internal to CamCORS, consisting of any string up to 20 characters long. It is intended to be used to store, for example, the current year of a student's course, although Colleges are free to use it for any purpose they require. A drop-down list is provided of all College-defined Groups which have been defined (this is done by editing the Student Record: see Sections 2.9 and 4.3.) You can search for reports by a student's College-defined Group.

Tripos The name of the Tripos Part for which the supervisions were given: choose one from the drop-down list. Some browsers will allow you to type the first letter of the required Tripos Part (H01 code) to jump to the relevant place in the list. If you use a mouse wheel, be careful to remove the focus from the drop-down list after you have selected a Tripos, since moving the wheel inadvertently will alter your choice.

Tripos H01 code Letters from the beginning of the University's internal (H01) code for the Tripos. These codes are listed in the drop-down box above. For example, entering `NST0` will search for reports in the Natural Sciences Tripos, Part 1A, whilst `NST` will search for *all* Natural Sciences reports. You can search for reports by H01 code or code prefix.

Paper title The official title of the paper (as given in the H03 University Examination and Paper Codes List at http://www.admin.cam.ac.uk/offices/students/codes/h03.html.)

Topic The topic of the supervisions, as described by the supervisor. You can search for reports by their topic, if you know the precise text of the description used.

Term The term, whether Michaelmas, Lent, or Easter. This field defaults to the *current* term, or the term that has just ended. Other terms may be selected from the drop-down list.

Year The academic year. This field defaults to the *current* year. The 'Year' search criterion refers to academic, rather than calendar, years. Other years may be selected from the drop-down list.

Predicted class The class predicted by supervisors for students on whom they have submitted reports.

College action Check this box to search for reports in which the supervisor has recommended that College action be taken.

Missed supervisions Check this box to search for reports where supervisions have been missed.

XRNLI The report's unique code number. You can search for a single report using its XRNLI number.

State Refers to the report's progress through CamCORS. One of the following:

> **All report states,** for all reports in any of the states described below,
>
> **Not yet submitted,** for reports created by supervisors but not submitted
>
> **Submitted** for all submitted reports irrespective of payment state,
>
> **Submitted but not yet approved** for all submitted reports awaiting a payment decision,
>
> **Payment approved** for all submitted reports for which payment has been approved,
>
> **Payment refused** for all submitted reports for which payment has been refused,
>
> **Payment approved but not processed** for those submitted reports for which payment has been approved by an appropriate College authority, but which have not yet been marked as processed for payment, and
>
> **Payment processed** for all reports which have, in addition to the above, been marked as processed for payment, and which require no further action within CamCORS.

> Each of these 'States' corresponds to a useful combination of 'true' report states as entered in the table, below. For example, selecting 'Payment approved' will return reports in the 'Approved' state.

> 'Payment pending' corresponds to the single entry 'Approved'. Only reports in this state may be marked as processed and exported to Colleges' financial systems.

Student access Whether the student is entitled to view the report: one of 'Released or not' (*i.e.* show both), 'Released to student', or 'Not released'. You can search for reports by their release state (*i.e.* whether the student is enabled to view them.)

Submitted The date the report was submitted. You may search for any date range by entering two dates in the format dd/mm/yyyy. Leading zeros are required, *i.e.* 03/09/1989 and not 3/9/89. You can search for reports submitted in any date range (and not just 'on or after' a date.)

Red dot Whether to take account of the red dot facility, and if so, whether the red dot must be set or clear. (See 3.2.)

By default, your search results will be shown in batches of 100. If you need to vary this setting, for example to perform some action on a large number of reports simultaneously, change the number in the 'Up to... ...reports will be shown' box beneath the search form. Once you are happy with your search criteria, click 'Search for Reports' on the right-hand side of the lowest grey bar to run your search.

3.2 Sorting and selecting retrieved reports

Once you have made a search, a table will be visible below the form listing all the reports that matched your criteria. This table has six columns, initially in this order:

Student The name and CRSid of the student.

Supervisor The name and CRSid of the supervisor.

Subject A condensed description of the paper being taken.

Term The term for which the supervisions were given, in the form Xyyyy where yyyy is the calendar year and X a single-letter abbreviation for the term (M for Michaelmas, L for Lent and E for Easter.)

State Refers to the report's progress through CamCORS. One of the following (in their sorted order:)

Created, for reports which the supervisor has created but not yet submitted,

Submitted, for submitted reports still awaiting a payment decision,

Refused, for submitted reports for which payment has been refused,

Approved, for submitted reports for which payment has been approved,

Processed for all reports which have, in addition to the above, been marked as processed for payment, and which require no further action within CamCORS.

Note that, unlike the 'State' drop-down menu in the search form, above, these categories are not mutually exclusive.

Submitted The date on which the report was submitted, if applicable.

The table is automatically sorted by the first column, then the second, and so on. Each of the column headings is a button allowing you to sort the table of search results to your preference. If you click on one of these buttons, that column is moved to the leftmost position, and the table is sorted accordingly.

For example, to obtain a table sorted first by subject and then by Term,

- Click on the <u>Term</u> button, to move the 'Term' column to the left and sort,

- Now click on the Subject button, to do the same to the 'Subject' column. The reports are then sorted by subject, but reports with the same subject remain sorted by date.

CamCORS will remember the current sort order if you make a new search, or if you perform other actions within CamCORS before returning to the Report Search and Selection page. Once you log out, this information is lost; next time you log in you will see the columns in the default order given above.

To select reports for action, check or uncheck the boxes to the left of each table entry. The buttons in the 'Actions' panel at the bottom of the page apply to the selected reports only. For convenience, three additional buttons are provided at the bottom of the table:

Select All Checks all the boxes.

Deselect All Unchecks all the boxes.

Reverse Selection Checks all the currently unchecked boxes, and unchecks all the currently checked boxes.

These buttons reload the page, but do not alter which reports are displayed or how they are sorted.

Red dots

A College Office can mark selected reports with a red dot by clicking Set red dot (an action button). Similarly, red dots can be cleared by clicking Clear red dot. An additional field at the bottom of the search form allows you to search for red dotted reports. (Change the 'Red dot' dropdown from 'ignored' to 'set' or 'clear'.) Red dots do not affect any other behaviour in CamCORS.

Colleges may use these red dots to manage reports ars they wish, by assigning the red dot a significance of their choosing.

3.3   Viewing reports

Once you have made a selection, click View or process to display the reports. This page does not contain any search facilities. If you want to view a different selection of reports, you should return to the 'Report Search and Selection' page using the Cancel button at the bottom, or if you have made changes you wish to save (see below), the Save Changes button. Each report on the page appears in either *stub* form or *full* form, usually the former.

Stub reports

Stub reports are visible whenever a report has been created, but has not yet been submitted by the supervisor. They contain basic administrative information common to all reports, as well as providing some useful e-mail links (Section 3.10.) Available is

- (on the left side) the student's name, CRSid (with e-mail link) and College,

- the Tripos for which the report is being written,

- the paper for which the report is being written, followed by the topic if applicable (in brackets)

- 'Supervised by', followed by the supervisor's name and CRSid (with e-mail link),

- the term and calendar year of the supervisions,

- (on the right side) a unique reference code for the report, beginning `XRNLI-`,

- an e-mail link to the College's `supervisions@college.cam.ac.uk` address, which is set up to allow College Offices to direct to the appropriate person any general enquiries relating to the report,

- an e-mail link to the student's Director(s) of Studies for this course, if applicable,

- an e-mail link to the student's Tutor(s) for this course, if applicable, and

- (on the far right) the student's photograph (if available.)

Full reports

Once a report is ready to be viewed, the stub report expands into its full form. At the top of each full report is an information section, containing the same details and e-mail links as the stub form of the report. Below it is the actual report, containing the following information:

- (at top left) the supervisor's general assessment of the student's

  industry, (Good, Satisfactory, Unsatisfactory, Not specified)

  progress, (Good, Satisfactory, Unsatisfactory, Not specified)

  interest, (Enthusiastic, Interested, Could show more, Not specified), and

  likely result for the examinations in this course.

- (at centre left) A table showing, on the bottom row, the number of hours of supervision given (including those missed and yet to come) and, on the top row, the number of students in each supervision group.

- (at top right) The text of the supervision report.

- (below these) Information on (from left to right):

  the payment method the supervisor would prefer for this report;

  the payment decision for the report, including who made it and when. This field may be edited; see section 3.4.

  the release status of the report, *i.e.* whether the student is enabled to view it (if this decision has not been made and you are authorized to make it, this field may be altered; see section 3.7.)

  the submission date of the report, if a payment decision has been made; otherwise absent

  a check-box enabling you to return a report to a supervisor (see section 3.8.)

- (at bottom) A space for comments made by the College on this report. You may add your own comments using the 'Add a comment' text box below; see Section 3.6.

Full reports are not normally available to Course Directors.

The College may exclude reports from Course Director view (thereby overriding the decision of the Senior Tutors' Standing Committee on Education in respect of their own students. This may be done through the <u>Configure college-wide preferences</u> option. Course Directors are always informed which Colleges have done so.

3.4   Making payment decisions

College Office users are able to approve or refuse payment for any report on behalf of the Senior Tutor or a Director of Studies.

Generally, the submission of a report by a supervisor is in effect a claim for payment. The report itself contains information on the number of hours of supervision given. The number of "hours missed" is given for information, but CamCORS assumes that the supervisor is to be paid for these, as for hours "to come". Once the report has been released for viewing, the student can see the number of hours claimed by the supervisor and query these if necessary; however, they cannot see whether payment has been approved or refused.

Submitting a report normally constitutes a claim for payment except in those few cases where supervisors have arranged not to be paid, or to be paid by a mechanism outside CamCORS; the latter may be necessary for the small number of non-graduate-student supervisors who lack a National Insurance number.

If you decide to approve payment, the report will have added to it a legend reading 'Payment approved by *your name* on *date*.' This legend can be read by the supervisor as well as by college staff. The report can then be processed for payment by the College Office. In the final payment file, which will be passed from CamCORS to your College's finance systems, your CRSid will identify you as the person who approved payment. You should therefore consult with the appropriate person in your accounts office to see if they will require a letter or other form of authorisation from the person on whose behalf you are performing the action.

You may also refuse payment for a report. If you do this, any claim for payment is blocked and cannot be processed. You may wish to inform the supervisor of what you have done and why (although if they search for the report, the legend 'Payment refused by *your name* on *date*' will be visible.) The report remains in the database and can be released to the student, who will not see the 'Payment refused' legend. Refusing payment should be treated as a last resort; it is for the appropriate College authority to decide when it should be done.

Refusing payment is *not necessary* if you simply want to obtain a revised or corrected report from the supervisor, since reports may be returned to the supervisor for editing and resubmission (Section 3.8.) A report which has been returned to the supervisor and then resubmitted will *replace* the original report in the CamCORS database. It can then be processed as normal.

In the event that a report has been mistakenly marked as refused for payment when it should have been approved (or vice versa), the Senior Tutor and College Office users are

able to reverse the payment decision (Section 3.5), as long as it has not been processed for payment.

There are two ways you can make payment decisions on reports:

- Whilst reading reports on the 'Report Viewing and Processing' page, you may make payment decisions for reports for which you have responsibility. Choose a payment decision from the drop-down list at the bottom middle of each report. If you use a mouse wheel, be careful to remove the focus from the drop-down list before moving to the next report, since moving the wheel will alter the setting. You can do this by clicking somewhere in the yellow body of the report.

  When you have finished making changes, click Save Changes at the bottom of the page. The next screen will list the changes you have made; you should check these carefully before confirming.

- *Alternatively*, on the 'Report Search and Selection' page, select the reports from the list for which you wish to approve or refuse payment. Click either Approve payment or Refuse payment in the second row of the 'Actions' panel to make a payment decision for all the selected reports. Authorized users may make payment decisions on several reports at once on the 'Report Search and Selection' page, rather than considering each individually.

  If you have selected reports for which a payment decision has already been made, or which have not been submitted by the supervisor, CamCORS will generate an error message. Including the 'State: Submitted but not yet approved' search criterion will ensure that the only reports that are listed are those awaiting approval or refusal.

3.5   Undoing payment decisions

College Offices are able to undo payment decisions made for any report submitted to their College. The effect of this action is to return the report to the 'Submitted' state. If the report was previously approved, it will no longer be ready for processing.

If you undo a payment decision, you should contact the Director of Studies of the student concerned to alert them to what you have done (and why). If the Director of Studies was responsible for the original decision, they will need to know what further action is necessary before a further payment decision can be made. You should not, however, add a comment to the report explaining your reasons for undoing the decision; the comments box is intended only for communication with the student (see Section 3.6.)

To undo payment decisions:

- Whilst reading reports on the 'Report Viewing and Processing' page, check the Decision should be undone box at the bottom middle of each report on which a payment decision has been recorded (but which has not yet been processed for payment.) When you have finished making changes, click Save Changes at the bottom of the page. The next screen will list the changes you have made; you should check these carefully before confirming.

- *Alternatively*, on the 'Report Search and Selection' page, select the reports from the list for which you wish to annul the payment decision, and click Undo payment

decision in the third row of the 'Actions' panel. The next screen will list the changes you have made; you should check these carefully before confirming.

If you have selected any reports for which a payment decision has not been made (*i.e.* finalized), CamCORS will generate an error message. (CamCORS politely ignores attempts to undo payment decisions in relation to reports which had not been marked as approved anyway.)

Once a payment decision has been "undone", the Senior Tutor, College Office, or Director of Studies can return the report to the supervisor, if this is appropriate.

Senior Tutors and College Office account holders may annul payment decisions, returning reports to the 'Submitted' state, and then return them to supervisors (if desired), as long as they have not been processed for payment.

3.6 Adding comments to reports

Whilst you are reading a selection of reports on the 'Report Viewing and Processing' page, you may add comments for the student by entering a line of text in the text box at the bottom of each report. Comments are visible by all users entitled to view the report, including the supervisor and the student to whom the report refers (when it is released.)

The CRSid of the user making each comment will be prefixed to it when the report is viewed. Should the Senior Tutor or a Director of Studies or Tutor ask you to add a comment to a report on their behalf, you should bear in mind that this comment will appear on the report with *your own* CRSid. You should therefore attribute the comment clearly to the person who made it if you are acting on behalf of someone else.

Comments are permanent additions to the report, and cannot be deleted. However, if a report is returned to the supervisor for resubmission (Section 3.8,) the new report will have a blanked comments area. Thus, if a report has not already been released for viewing by the student and you wish to return it to the supervisor, you can use the comments area to communicate with the supervisor. If you do this, however, you must still contact the supervisor by e-mail to alert them to what you have done. It would be helpful to note the XRNLI number of the report you have returned, so that the supervisor can more easily locate it.

When you have finished adding comments, click Save Changes at the bottom of the page.

3.7 Releasing reports to students

Once the Director of Studies or other authorized person is happy for a student to read a report, they can release it for viewing. CamCORS allows this to be done by Directors of Studies, the Senior Tutor, and Tutors, provided that the College has configured CamCORS to allow the release of reports to be controlled in this way (Section 2.10.) Individual colleges may wish, as a matter of policy, to permit only one or more of these roles to make reports visible by students; however, this is a matter for internal management, and cannot be enforced within the system.

To release reports for viewing by the student:

- Whilst reading reports on the 'Report Viewing and Processing' page, check the The student may read this report box at the bottom right of each report. When you have finished making changes, click Save Changes at the bottom of the page. The next screen will list the changes you have made; you should check these carefully before confirming.

- *Alternatively*, on the 'Report Search and Selection' page, select the reports from the list which you want to release, and click Release to student in the second row of the 'Actions' panel. Authorized users may release a number of reports to students at once on the 'Report Search and Selection' page.

  The next screen will list the changes you have made; you should check these carefully before confirming. If you have selected any reports which have not been submitted, CamCORS will generate an error message. Including the 'State: Submitted' and 'Student access: Not released' criteria in your search will ensure that the only reports that are listed are those which are ready to be released, subject to your approval. Deselect any report included in the summary list which you do not wish to release. CamCORS politely ignores attempts to re-release to the students reports already released to them.

3.8   Returning reports to supervisors

If a submitted report is unsatisfactory for any reason, so that it requires resubmission, CamCORS allows you to return it to the supervisor. This is distinct from refusing payment for a submitted report and asking the supervisor to create another for the same student, since in that case the refused report remains in the database. Where you think the supervisor should correct, revise or complete a report more fully, returning the report to the supervisor would be more appropriate (at least initially) than refusing payment. The report cannot be processed further for payment until it is resubmitted.

A report may only be returned immediately after its submission, and before a payment decision has been made. If you decide that a report should be returned after a payment decision has been made, the payment decision will first have to be undone by either the Senior Tutor or the College Office (Section 3.5.) A report cannot be returned to the supervisor once the report has been processed for payment.

When a report is returned, its state reverts to 'Created'. The supervisor will see the report as it was just before they initially submitted it; they can then edit the report before resubmission. Any comments you or others have made on the report (see Section 3.6 remain visible to the supervisor, but will *not* be submitted with the corrected report. You should also contact the supervisor by e-mail to alert them to what you have done.

To return a report to the supervisor:

- Whilst reading reports on the 'Report Viewing and Processing' page, check the This report should be returned box at the bottom right of the report. When you have finished making changes, click Save Changes at the bottom of the page. The next screen will list the changes you have made; you should check these carefully before confirming.

- *Alternatively*, on the 'Report Search and Selection' page, select the reports from the list which you want to return, and click Return to supervisor in the second row

of the 'Actions' panel. The next screen will list the changes you have made; you should check these carefully before confirming.

If you have selected any reports which have not been submitted CamCORS will generate an error message (though it will politely ignore attempts to return to supervisors reports which they had not yet submitted anyway). Including the 'State: Submitted but not yet approved' search criterion will ensure that the only reports that are listed are those which may be returned without first undoing a payment decision.

As long as a payment decision has not been made, a report may be returned to supervisors for resubmission.

3.9   Printing out reports

It is expected that College Offices will need to print out all reports routinely for their own record systems, or save them to a local disk or server. You may also be asked to provide reports in printed form to other users, *e.g.* Tutors or Directors of Studies. Policy for archiving is left to the decision of individual Colleges; however, all reports are expected to remain in the CamCORS database throughout the life of CamCORS (currently estimated at ten years.)

When printing or saving reports, it is likely that you will wish to restrict the reports printed to those submitted recently. You can use the 'Submitted (date)' search criterion to do this (section 3.1.) CamCORS is not able to record whether you have previously printed out a report; you can avoid accidentally printing duplicate copies of report forms by keeping a record of the date you last printed out reports, and using the 'Date submitted' search criterion to restrict the results to subsequently-submitted reports. Reports may be exported from CamCORS either in PDF (Portable Document Format, suitable for printing or achiving on a server or CD-ROM), or as raw data which you can later load into a spreadsheet or your own database. You will need to have a PDF viewer installed when you come to print reports; Adobe Acrobat Reader is free and available from http://www.adobe.com/products/acrobat/readstep2 .html.

To generate PDF report forms:

- Find and select the reports which you wish to export on the 'Report Search and Selection' page (Section 3.1.)

- Click Display PDF on the first row of the 'Actions' panel. You will be prompted to display the resulting file, or alternatively to save it. The PDF file contains two reports per A4 page, in a similar arrangement to that displayed online (Section 3.3.) The reports appear in the same order as they appeared on the 'Report Search and Selection' page—*i.e.* taking account of any sorting you have performed (Section 3.2)—with the first report being at the top of the first page, the second below it, and so on.

- *Alternatively*, click Display PDF for guillotine. This performs the same action, except that the second report is placed at the top of the second page, and so on, so that the report placed at the bottom of the first page occurs halfway through the list of reports. This ordering means that if you cut through the stack of A4 sheets and

then place the bottom page halves behind the top page halves, the resulting stack of A5 sheets will be in the order you required. You can print out reports in a form suitable for guillotining.

Once CamCORS has generated a PDF file, it will pass it to your browser. If you have a PDF viewing program installed on your computer, your browser may ask you whether you wish to open it now or save it for later; or it may ask you for a location on your local computer where it can put the file.

If you are using Microsoft Internet Explorer to use CamCORS, you may see a message asking whether you want to display 'secure and insecure content'. Click Yes to load the PDF document.

Once the PDF viewing program is running, it acts as a separate task. To print or save the file, you should use the facilities that program provides. If you wish, you can continue working in CamCORS whilst the PDF viewer is open. Click Back to report summaries in your browser window to continue working in CamCORS. PDF files are displayed in their own window; where browsers such as Internet Explorer attempt to suppress advertising-style pop-up windows, users may need to right-click rather than left-click to access the PDF file.

If you would rather obtain the report data in a form suitable for processing, you should use the Export data facility. See section 4.4 for more details.

3.10   Sending e-mail

CamCORS provides two convenient ways of sending e-mails to the students, supervisors, Directors of Studies and Tutors associated with a report or selection of reports. E-mail links are quick and handy, but require you to have an e-mail program installed and configured on the machine you are using. Web-based e-mail is provided within CamCORS, and is more flexible if a little less convenient.

Most of the e-mail addresses held in CamCORS are personal addresses held by the addressee only. The exception is the special address `supervisions@college.cam.ac.uk`, which is guaranteed to exist for all `colleges`. When you e-mail `supervisions@ college.cam.ac.uk`, or use the links or form described below, your e-mail will typically go to someone in the Tutorial Office who can redirect it as necessary. You should therefore use a clear, generic header (*e.g.* "Tutorial problem", "Query concerning ...", etc.) to enable the recipient to pass on your query, if necessary, quickly and efficiently.

You should remember that an e-mail is basically an electronic postcard, and that it is not good practice to use e-mail for very confidential or sensitive comments. Much of what is recorded in CamCORS or in email might form the subject matter of a Data Protection Act subject access request, and therefore the question is not whether the student can see it but how much effort must be expended in doing so. Supervisors who wish to make comments about a student which they would not wish to be disclosed to the student are advised to do so over the 'phone rather than via email or CamCORS.

E-mail links

To send an e-mail to people associated with a single report, first view the report as de-scribed above (Section 3.3.) Every report has five links at the top, which allows email to be composed and sent, using your own email programme, to any *one* of

- the student

- the student's supervisor,

- the College's `supervisions@college.cam.ac.uk` address,

- the student's Director(s) of Studies, or

- the student's Tutors.

(Directors of Studies and Tutors are assumed to have e-mail addresses of the form `crsid@cam.ac.uk`.)

If you wish to send e-mail to people associated with more than one report, find and select a group of reports from the 'Report Search and Selection' page (Section 3.1), and click Email on the 'Actions' panel at the bottom.

Below the form on the next page are five links, which work in the same way as those on the report form for the combination of all the reports you selected. Beside each link is a list of the e-mail addresses to which your message will be sent. Clicking on any of these links will launch the e-mail program you have configured in your browser, if any, and will send e-mail from whatever address is configured into that program.

Web-based e-mail

CamCORS also has a web-based e-mail facility that you may use if

- you prefer not to install an e-mail client,

- you are using a public machine, or any machine that is not configured for you, or

- you wish to send e-mail to more than one of the above categories of people simul-taneously,

To use this feature, find and select a report or group of reports from the 'Report Search and Selection' page (Section 3.1), and click Email on the first row of the 'Actions' panel at the bottom. Check the boxes corresponding to the people to whom you wish the message to be sent, type the text of the message into the box and click Send email. CamCORS sup-ports the use of Blind Carbon Copy, which permits a recipient's existence to be concealed from other recipients of a message.

E-mails sent from this form will appear as if sent from your own `crsid@cam.ac.uk` account. You should ensure that replies sent to this address can reach you.

You can send e-mails directly from CamCORS to people associated with a report or group of reports.

For example, towards the end of each term you may wish to remind supervisors that they should ensure they have submitted reports in respect of all the supervisions they have conducted that term. To do this, you could run a search for created, unsubmitted

reports (Section 3.1), and use the Email link to send an e-mail to the supervisors of all those reports. If a supervisor has created several reports, they will still only receive a single e-mail.

This facility may also be used to communicate with supervisors at the beginning of a term, *e.g.* to thank them for agreeing to supervise your students, or to inform them of any preferences the College has in regard to the style and content of supervision reports.

3.11 Checking supervision arrangements

You can see the current supervision arrangements for all the students in your College by selecting View supervision arrangements from the main menu. This produces a list detailing the current state of supervision arrangements for each student, Tripos and term, sorted initially by term and then by Tripos. An entry is produced for

- every student being supervised in the current term, and

- every student with reports remaining unsubmitted from any term.

Within a Tripos, each student taking that Tripos in the relevant term is listed together with entries for their supervisions for each paper and topic. The student's name and CRSid are shown as a link; clicking this will run a search for all that student's reports in that term (see Section 3.1.)

If no supervisors have yet created report forms for that student, the student's name is followed by the words *Paper [Topic] Supervisor*. When they create report forms, a table appears below this legend detailing the paper, topic and supervisor for each set of supervisions, where

Paper refers to the official title of the paper (as designated in the H03 Codes),

Topic refers to the description of the paper topic given by the supervisor, and

Supervisor shows you the full name and CRSid of the supervisor.

Since supervisors are encouraged to create report forms for their students as soon as the supervisions are organized, you can use this list to check that supervision arrangements are in place for each of your students (including supervisions organized by departments or faculties.) In addition, because unsubmitted reports continue to be listed after a new term begins, you can use this list to identify supervisors who are late submitting their reports.

3.12 Viewing supervision costs by Director of Studies

For a given academic year, the costs of supervisions associated with each Director of Studies may be displayed. By selecting View Supervision Costs by DOS, the current academical year's details are displayed by default. A drop-down list of all academical years is provided, and once a year has been selected the page may be updated with the details from that year by clicking Calculate and Display.

This report provides information on the hours of supervision provided for each of his/her students by each Director of Studies and the cost of providing that supervision.

Directors of Studies are organised alphabetically, and within each Director of Studies report are listed the students, also organised alphabetically. The Report is based only on supervision reports for the specified year that have been Processed for Payment at the time of the report.

If a Student has more than one Director of Studies allocated to him/her, then identical information is presented under each Director of Studies. If a Student has no Director of Studies allocated, then the information will not be presented.

The Hours are Supervisee Hours and represent the number of hours of supervision received by each student regardless of Group Size.

The Cost assumes that the supervisions have been paid for at the agreed Standard Rates. Two students who have received the same number of hours supervision may incur a different cost because they have been supervised in different sized groups.

The Average number of Hours is the Total number of Hours divided by the number of students listed for each DoS; the Average Cost is the Total cost of providing that supervision at the Standard Rate divided by the number of Students listed for each DoS.

The Student's CRSid acts as a hyperlink to all of the supervision reports written about that student in the specified year that have been Processed for Payment. This should facilitate clarifying any issues arising from this Report.

3.13   Notification of reports

Directors of Studies and Tutors may request that they be emailed notification of newly submitted reports. Neither the Senior Tutor nor the College Office knows if the Director of Studies or Tutor has activated this facility[1].

3.14   Viewing and exporting statistical information

To view statistical reports, click View Statistical Information from the main menu. The statistics include only reports written using CamCORS; reports written on paper are not included. The statistics include only reports that have been processed for payment at the time you requested the report.

The following statistics can be displayed:

Cost of supervision The cost contributed by each Report is calculated by multiplying the payment rate for each group size by the group count. In the case of the big group size, the rate is divided by the big group size.

Student hours of supervision The number of hours contributed by each report is equal to the attendance count. Note: The hours are calculated from the point of view of the students, not of the supervisor.

Supervisor hours of supervision The number of hours contributed by each report is equal to the attendance count divided by the group sizes.

---

[1]this may be relevant when they attempt to word communications with supervisors inquiring as to why they have not been paid

Number of students supervised Each student is counted once in total, no matter how many reports are written about them, except if the statistics are broken down by term, in which case each student is counted once in each term.

Cost of supervision per student The cost per student is calculated by dividing the cost of supervision by the number of students.

Student hours of supervision per student The number of hours per student is calculated by dividing the number of student hours of supervision by the number of students.

Supervisor hours of supervision per student The number of hours per student is calculated by dividing the number of supervisor hours of supervision by the number of students.

The data can be broken down by various criteria, as rows or as columns. If the data is broken down by several criteria, the resulting table can be very large. For example, a break down by 31 colleges, 3500 Papers and 6 group sizes makes 651,000 cells; a break down by 3 terms, 250 Triposes, 11 supervisor categories and calculate 7 statistical summaries would generate a report of 57,750 cells.

A break down involving many cells will take longer to perform than one involving fewer cells. Please be patient if the server is slow to respond. A search for data on all college and all H01 codes may take 4-5 minutes. To avoid burdening the CamCORS servers excessively, there is a limit of 50,000 cells (efforts have been made to alleviate the effect of this restriction in cases where it appears to be operating against reasonable queries; please report suspected deficiencies). In any case, distributing the data too thinly may make it statistically insignificant.

If you break the data down by Tripos or Paper, Triposes or Papers that are not mentioned in any report will not be shown.

Generating a statistical report

The report generation system has two main parts: a line of dropdown boxes in which queries may be specified, and a column of dropdown boxes for specifying how the results should be broken down. If your web browser and screen are sufficiently wide, the query dropdown boxes might all fit on one row, which makes the display much clearer: you are being asked to specify four things: the type of statistics you want, the college, the H01 code, and the year. An additional box is provided below for specifying which H01 particular H01 code is desired, when applicable.

From the first dropdown, select what you would like statistics on. See above for details. The choices are:

- Cost of supervision, in pounds

- Student hours of supervision

- Supervisor hours of supervision

- Number of students per supervision

- Cost of supervision per student

- Student hours of supervision per student

- Supervisor hours of supervision per student

From the second dropdown, select either 'my college' (for details of your own college), or 'all colleges' (for anonymised statistics). From the third dropdown, either 'All H01 codes', or 'Specified H01 code' and enter the code in the textbox below.

From the fourth dropdown, select which year you would like statistics for.

Now select which information breakdowns you require. There are several dropdowns for each category, each dropdown detailing different ways that the breakdown can be provided (ie. by row or column):

College in summary or individually; by row or by column. If you select 'No breakdown by college', you will be presented with (mean) averaged statistics taken from all the colleges in the report. The effect of selecting 'Break down individual colleges' whether by columns or rows, depends on whether the statistic you are requesting is a total (*e.g.*, total cost of supervision) or a ratio (*e.g.*, cost per student). For totals, the contribution towards the result will be summed. In the case of ratios, the two terms are totalled separately and then one is divided by the other, *e.g.*, the costs are summed, the number of students is summed, and then one total will be divided by the other. You will be presented with anonymised statistics for other colleges included in the report. In full, the choices are:

- No breakdown by college
- Break down college summary as rows
- Break down college summary as columns
- Break down individual colleges as rows
- Break down individual colleges as columns

Term by row or by column. In full, the choices are:

- No breakdown by term
- Break down terms as rows
- Break down terms as columns

Subject subject, Tripos and part, or paper; by row or by column. In full, the choices are:

- No breakdown by subject
- Break down subjects as rows
- Break down subjects as columns
- Break down Triposes and Parts as rows
- Break down Triposes and Parts as columns
- Break down Papers as rows
- Break down Papers as columns

Supervisor category by row or by column. In full, the choices are:

- No breakdown by supervisor category

- Break down supervisor categories as rows

- Break down supervisor categories as columns

Group size by row or by column. In full, the choices are:

- No breakdown by group size

- Break down group sizes as rows

- Break down group sizes as columns

To generate the report, click either the Calculate and display button for a report page, or Calculate and export to directly export the report as a CSV file instead of displaying it.

If you clicked Calculate and Display, the page is reloaded and the report is placed at the bottom of the page. Experiment with combinations and layouts to generate what you want to see. Reports by H01 code or for a single college are generally much quicker than 'All H01 codes' or 'All colleges' (which may take 4-5 minutes).

Once you have got the format you want using Calculate and display, you may with confidence repeat the process using Calculate and export to get, for example, a similar report for different years.

4 Working with data files

4.1 CSV data files

All data files for CamCORS are in CSV format, with comma-separated fields and newline-separated records (*i.e.* one row per record.) CSV files can be created using a variety of programs, most simply using a basic text editor such as Notepad. Microsoft Excel also has some facilities for editing CSV format.

Working safely with CSV files

CSV files are flexible and portable, but there are some issues with them, in particular involving Excel. If you intend to use Excel to edit CSV files, you should read the following sections with care.

By default, Windows hides file extensions for types it thinks it knows about, including CSV. This can cause some confusion, since the icons for different file types are similar. In order that you can more clearly distinguish CSV files from true Excel files (`.xls`) or text files (`.txt`) we recommend that you ensure Windows displays the extension to the file name by the following method:

- Open the folder in which you keep your CamCORS files.

- Go to the Tools menu and select Folder Options....

- Select the View tab.

- Make sure that 'Hide file extensions for known file types' is *not* ticked.

- Click OK.

Using CSV files in text editors

In many circumstances you may only wish to check an entry, rather than undertake any serious editing of the data. On these occasions, you may find it easiest to open the file in Notepad. If you have not changed the default application for opening CSV files to Notepad (as above), this may be performed as follows:

- Open Notepad (often found in Start→Programs→Accessories.)

- Open the File menu, and click Open....

- Change 'Text Files' to 'All Files' and locate the file you wish to open.

- Use Find... or Replace... from the Edit menu to search the file.

- If you wish to keep a copy of the file which opens with Notepad by default, give it a different filename when saving, for example by adding `.txt` to the end. If you do not do this (and Excel still 'owns' CSV files), double-clicking on the saved file will load it into Excel.

Working with Excel

Excel is easy to work with, but highly idiosyncratic. If installed on your system, it will give CSV files an icon similar to its own, but with 'a,' in the file box. Double-clicking on the file will import it into Excel using the default settings. However, these *are not suitable* for working with CamCORS' CSV files. In particular,

- CRSids often take the form of three letters followed by two numbers. If Excel spots a field whose letters spell 'JAN', 'FEB', 'MAR', etc., it will by default interpret it as a date: thus the valid CRSid, dec25, would be silently converted into Dec-25 wherever it occurs. Most Colleges have at least one such CRSid in their data.

- Excel also strips leading zeros from fields that look like numbers. Bank accounts often contain leading zeros, and these will be lost in conversion.

If CSV files are associated with Excel in Windows, double-clicking on them will *always* cause these problems, no matter how many times you have previously altered the settings.

A global solution is to make a simple text editor, rather than Excel, the default program with which to open these files. If the only CSV files you handle are those connected with CamCORS, this is likely to be your best option.

- Select any CSV file (an Excel icon with 'a,' in the box.)

- Right-click and select Properties.

- Next to the text reading 'Opens with Microsoft Excel', click on the button marked Change....

- From the resulting list select Notepad, either by scrolling down or by pressing n repeatedly.

- Click OK.

- You are returned to the Properties window. Again click OK.

Notepad is now the default application for viewing and editing CSV files, and their icons will change to reflect this. Notepad does not alter any file when it is loaded, so double-clicking them will now be safe.

Loading CSV files into Excel (Office 2000)

It is possible to work safely with CSV files in Excel by using its import function. However, Excel must already be running for you to take advantage of this. To import a CSV file safely:

- Create a blank new worksheet.

- On the Data menu, select Get external data.

- Choose Import text file.

- Change the 'Files of type...' entry from 'Text Files' to 'All Files'

- Find and select the file you wish to 'import' (*i.e.* open.) Make sure you choose the CSV file and not a `.xls` or `.txt` file of the same name.

- Click <u>Import</u>.

- A wizard will pop up, defining your file as 'delimited' and displaying some sample entries. Click <u>Next</u>.

- Check the 'commas' box, and *uncheck everything else.* Click <u>Next</u>.

- You will see some sample data. Highlight all columns by clicking in the first, holding down SHIFT, and clicking in the last.

- Click on <u>Text</u> in the Formatting Options pane.

- Click <u>Finish</u>.

- Click <u>OK</u> in the next window.

You now have data in a form you can manipulate, and on a sheet that will not convert CRSids to dates nor drop leading zeros.

If you have a different version of Excel to the one described here, ask your Computer Officer how to import CSV files as text.

Saving CSV files from Excel

Excel is very reluctant to let one save files in any format other than its own `.xls` type. CamCORS cannot import Excel files, the format of which is proprietary, subject to change, and costly to license. Instead, you must ensure that everything is saved as CSV, resisting the insistent pressure from Excel to save them in its own format.

In particular, files which have previously been saved in `.xls` format may still contain invisible 'formatting' characters which will generate errors when later imported into CamCORS.

4.2 Bulk create User Accounts

At the beginning of each year, you will need to create accounts for the Senior Tutor, all the Directors of Studies, Tutors, College Office staff and for the students who will be using CamCORS in the coming academic year. This may include graduate students who receive College supervision. In addition, if your College has decided to use the College-defined Group field (see below) to store information about the year of study of each student, or for any similar purpose, all User Accounts belonging to current students will need to be updated. Students who were included in CamCORS in the previous year but have now graduated or left the University should not be included in the new User Account data.

The <u>Bulk create User Accounts</u> facility is provided for this purpose. It sets up the database of College accounts on the basis of a CSV file that you provide, *overwriting all College-specific data previously held.* Thus, <u>Bulk create User Accounts</u> must *only* be used when you have a complete set of College data, including all current students, Directors of Studies, Tutors, College Office staff and anyone else who requires a CamCORS account

with your College. If an incomplete set of data is imported, any users whose account data has been omitted will find their accounts disabled. It is therefore *very important* to make sure that you have included yourself in the import file, correctly designated as a College Office account holder.

Also at the beginning of each year, you will need to update the Student Records for all students, taking account of new students, students who have recently graduated, progression through the Tripos for existing students, and also any students whose Directors of Studies or Tutors have changed. See Section 4.3 for more details. Remember that User Accounts must be created for new students before Student Records can be attached to them.

To add an occasional new User Account, or to make temporary changes after the beginning of the academic year (for example, if the holder of a Tutor account is promoted to Acting Senior Tutor owing to sabbatical leave, or similar), you should instead use the Point edit User Accounts facility (Section 2.8.)

Note that accounts for supervisors are not created by College Offices, but by the University Computing Service. This is so that information on supervisors can be shared amongst all Colleges. Supervisors will not need to be re-registered as such each year.

Preparing a user account file

The first time a College uses CamCORS, a user account file will have to be prepared from scratch. However, on subsequent occasions the current User Account data may be obtained by exporting it from the Bulk create User Accounts page. Clicking 'Export current data' at the bottom of this page will download a (large) CSV file containing details of every College user on the system in the correct format. By default, the name of this file takes the form `camcors_account_data_yyyymmdd.csv`, where `yyyymmdd` represents today's date. You can then update the file with this year's data in Notepad or Excel (Section 4.1) before importing it back into CamCORS. You will want to add records for new students and remove the records of all those who have graduated, as well as updating the information about any other College users (Senior Tutor, Tutors, Directors of Studies, and those with a College Office role) and, if the College wishes, adding data in the 'College-defined Group' field for students.

The format of the user account file looks like this:

```
afx20,Dr,Alfred,Xentakis,M,ST,E
rml39,Dr,Richard,Luddoraptor,M,DT,E
epn12,Dr,Elsbeth,Nepricorn,F,DT,E
aqc22,Prof,Alison,Metric,F,DT,D
fgc21,Mr,Fred,Croon,M,UG,E,Year 1
mnn25,Miss,Miniver,Nernst,F,UG,E,Year 3
```

In common with all CamCORS files, each line in the user account file contains a number of *fields* separated by commas:

- The CRSid of the user, as issued by the Computing Service. This acts as a unique identifier, and cannot easily be edited nor entirely removed after it has been imported into CamCORS (but see Section 2.8.)

- The user's title, *e.g.* Mr, Ms, Dr, Prof, etc.,

- The user's preferred name as it is to appear on the report form. Colleges may prefer to give initials in this space.

- The user's surname.

- The user's sex (M for male, F for female.)

- One of the following College roles:

    UG: Student users may use CamCORS only to read reports to which they have been granted access, and to check that report forms have been created before submission (including using the e-mail links provided on the report forms.)

    DT: Director of Studies/Tutor account holders may read reports submitted about the students for whom they have responsibility, and (if the College allows it) release processed reports to be viewed by the students, or return the report to the supervisor for correction. A person with a DoS/Tutor account may also approve or refuse payment for reports about students for whom they act as Director of Studies, although some Colleges may configure CamCORS so as to restrict payment decisions to the Senior Tutor and College Office. Directors of Studies and Tutors share the same level of *general* privilege on CamCORS, since a user may act as Director of Studies to one set of students and as Tutor to another. Each student has a list of Directors of Studies and Tutors as part of their Student Record, and CamCORS consults this to determine which actions can be taken for which student.

    ST: Senior Tutor account holders may read reports submitted about the students for whom they have responsibility, and release processed reports to be viewed by the students. They may also approve or refuse payment for reports about all such students, return reports to supervisors, or undo payment decisions.

    CO: College Office users are permitted to perform all these functions, in addition to various other administrative tasks. Only those with College Office accounts can create new College users or create or edit Student Records.

    Users with multiple roles should be given the most powerful role that they require, *i.e.* the one that appears last in the above list. So, for example, if the Senior Tutor also acts as Director of Studies for a number of students, they should have a role of ST. Senior Tutors may in practice prefer to be entered as College Office users, since the College Office role confers the same privileges regarding viewing of reports, but also has additional facilities for processing reports and configuring the system.

- The account status of the user (E for enabled, D for disabled.)

- *Optionally*, the name of a College-defined Group to which the user belongs. The College-defined Group is a label internal to CamCORS, consisting of any string up to 20 characters long. It is intended to be used to store, for example, the current year of a student's course, although Colleges are free to use it for any purpose they require. College users (apart from Student users) may then search by College-defined Group from the 'Report Search and Selection' page (Section 3.3.)

    When importing a new set of user accounts, an optional 'College-defined Group' field may be added.

Importing the file into CamCORS

Once you have created a file in the required format, containing information about all College users, you are ready to import it into CamCORS.

- Log in to a College Office account, and select <u>Bulk create User Accounts</u>. The top half of this page is a reminder of the format that CamCORS requires for your file, as described in the previous section. Below this is a form with a text box.

- If you know it, you can type the full filename of your file in here. Remember to include the full pathname and extension, for example `D:\Documents and Settings\Administrator\My Documents\camcors-allusers.csv`, and not just `camcors-allusers`.

- Otherwise, click <u>Browse</u> and navigate through your folders to select the file. Click <u>OK</u> and its full filename should appear in the text box.

- Click <u>Import</u>.

  This action will copy the file onto CamCORS, but will not immediately overwrite any existing data. First it is checked for validity to confirm that it is in the correct format. If the data deviates from the expected form, you will be shown a warning for each error; you should edit the file to correct the errors and attempt the importing process a second time. In particular, you should ensure that your own account is mentioned in the imported file, with College Office status. You will be warned if you attempt to import a file containing no College Office accounts.

  Note that the system can *only* check for errors of syntax. For example, if you use an invalid role code—such as `C` instead of `CO`—an error will be generated, but you will not be warned if instead you accidentally type the valid code `ST` for a Director of Studies (who should have the code `DT`). Likewise, CamCORS cannot tell from the syntax if a student's CRSid is mistyped. Be sure to check files carefully before importing.

  Assuming no errors were found, you will be asked to confirm that you wish to import the data, overwriting all the old data for your College.

- Click <u>Yes - replace all account information</u> to finish the process of importing data.

When data is imported using <u>Bulk create User Accounts</u>, any existing accounts that are not mentioned in the imported file will be marked as disabled. They may be re-enabled, if required, using the <u>Point edit User Accounts</u> facility (Section 2.8). If an account is marked disabled, the user concerned is unable to log in to CamCORS, but no other data associated with that user is altered. Thus, accounts created in earlier years for students who have now graduated (and are therefore not included in the new User Account data) will be automatically disabled, but their reports may still be read by other authorised College users.

If you have created a user with the wrong CRSid, then you should remove the erroneous account using the <u>Point edit User Accounts</u> facility (Section 2.8.) You must also delete the erroneous line in your input file and replace it with a corrected version, so that the unwanted account will not be recreated if you import the file again. A common source of errors is Excel, which tries to guess how input should be formatted (*e.g.,* reformatting the CRSid *dec20* as a date in December).

4.3 Bulk create Student Records

At the beginning of each year you will need to update the Student Records for all students, taking account of new students, students who have recently graduated, progression through the Triposes for existing students, and also any students whose Directors of Studies or Tutors have changed. Remember that User Accounts must be created and imported before Student Records can be attached to them.

The Student Record is a list of Triposes in which a student is expecting to be supervised, together with the CRSids of their Director(s) of Studies and Tutor(s). For a student to have a Student Record, they must already have a User Account (either enabled or disabled). A student is both the subject of reports and a user of the system: if you do not create a Student Record for each student, specifying the correct Tripos (H01) codes, supervisors will not be able to write reports about them.

Note that CamCORS is a supervision reporting system, *not* an examination entry system. Associating a Tripos with a student in CamCORS merely enables supervisors in that Tripos to write reports about them; it does not matter whether the student intends to take the examination.

The Bulk create Student Records option on the main menu is provided so you can add Student Records for an entire year's entry from a file. However, you can also add or update smaller numbers of Student Records this way, since importing Student Records *only* creates or updates records for the students mentioned in the file you import. Unlike Bulk create User Accounts (where the accounts of students missing from the file are automatically disabled), failing to mention a student will not affect their account, nor delete an existing Student Record. Thus, if a Director of Studies or Tutor takes sabbatical leave, you can use the Bulk create Student Records function to import amended Student Records for all the students for whom they were responsible, without affecting Records for other students.

Also at the beginning of each year, you will need to edit the records of all students who have recently graduated, by removing from their records all examination codes and all Director of Studies and Tutor CRSids. It is particularly important to ensure that the examination (HO1) codes are removed from these records in order to prevent supervision reports being accidentally created for them. The record will then take the form of the first example below (for `cnn20`).

For students who are temporarily out of residence (other than MML year abroad students) you should remove the H01 codes if they are not to be supervised in the coming term. In these cases however you should retain information about the student's Directors of Studies and Tutors, so that they will still have access to any pending reports (see the second example below, for `zzz99`).'

If your College has decided to use the College-defined Group field in the User Account to contain information about the current year of study of a student, you will need to import new User Accounts for all current students with this information appropriately entered. See Section 4.2 for more details.

Preparing a Student Record file

If you are intending to make major changes to existing Student Records, the current Student Record data may be obtained by exporting it from the Bulk create Student Records

page. Clicking 'Export current data' at the bottom of this page will download a CSV file containing all the records on the system in the correct format. By default, the name of this file takes the form `camcors_student_data_yyyymmdd.csv`, where `yyyymmdd` represents today's date. You can then edit the file in Notepad or Excel (Section 4.1) before importing it back into CamCORS (see later).

An excerpt from a sample Student Records file is shown below:

```
cnn20,EXAMS,DSOS,TUTORS,END
zzz99,EXAMS,DSOS,imz10,TUTORS,wsc01,END
nsc12,EXAMS,MDT1,MDQ1BD,MDQ1MD,MLD1,DSOS,iop12,TUTORS,wsc01,END
mnn25,EXAMS,MUT0,DSOS,rml10,TUTORS,epn12,END
mit47,EXAMS,NS21,NST2ET,SPT2,MLC2,DSOS,imz10,TUTORS,def88,END
```

Each line in the Student Records file contains a variable number of *fields* separated by commas:

- The CRSid of the user.

- The word EXAMS, exactly as printed.

- Zero or more University Examination codes (H01 codes, available online at http://www.admin.cam.ac.uk/offices/students/codes/h01.html).

  If no H01 codes are included, supervisors will not be able to create reports for this student. Students who have degraded should have no H01 codes, so that new reports cannot be created, whilst allowing their Directors of Studies and Tutors access to any pending reports. When a student graduates, or leaves the University for any reason, a 'blank' record should be imported for them (as shown for `cnn20` in the sample excerpt above.)

  Ensure that you include the H01 Code for all Tripos Parts from which a student is taking papers, including Diplomas and Certificates. Include also exemptions for medics and vets. There is no limit to the number of H01 Codes you can include.

- The word DSOS.

- Zero or more CRSids corresponding to the student's Director(s) of Studies.

- The word TUTORS.

- Zero or more CRSids corresponding to the student's Tutors.

- The word END.

If you are working in Excel (Section 4.1), note that cell boundaries are the equivalent of commas in the CSV file, and thus you must not put commas inside cells. Each H01 code, Director of Studies, and Tutor must have a separate cell. This means that although the EXAMS field will always occupy the second column, the DSOS, TUTORS and END fields will not necessarily lie directly above and below each other. CamCORS uses these fields, *not* columns, to determine how to interpret the data.

Importing the file into CamCORS

Once you have created a file in the required format, you are ready to import it into Cam-CORS.

- Log in to a College Office account, and select <u>Bulk create Student Records</u>. The top half of this page is a reminder of the format that CamCORS requires for your file, as described in the previous section. Below this is a form with a text box.

- If you know it, you can type the full filename of your file in here. Remember to include the full pathname and extension, for example `D:\Documents and Settings\Administrator\My Documents\camcors-newrecords.csv`, and not just `camcors-newrecords`.

- Otherwise, click <u>Browse</u> and navigate through your folders to select the file. Click <u>OK</u> and its full filename should appear in the text box.

- Click <u>Import</u>.

  This action will copy the file onto CamCORS, but will not immediately overwrite any existing data. First it is checked for validity to confirm that it is in the correct format. If the data deviates from the expected form, you will be shown a warning for each error; you should edit the file to correct the errors and attempt the importing process a second time.

  CamCORS checks the CRSids you have given for Students, Directors of Studies and Tutors against its User Account data, and errors will be reported if they do not match. This is why you *must* finish importing User Accounts for students, Directors of Studies and Tutors before you can create any Student Records. H01 codes are also checked against the current definitive list of H01 codes (available online at <u>http://www.admin.cam.ac.uk/offices/students/codes/h01.html</u>.) If you use an invalid H01 code—such as `NSY1` instead of `NST1`—an error will be generated, but you will not be warned if, for instance, you accidentally register the valid code `MDT0` for a first-year Mathematician (who should have the code `MAT0`). Be sure to check files carefully before importing.

  If any errors are found, you will be shown a report for each error. You should edit the file to correct the errors, and attempt the import a second time. When no further errors are found, you will be asked to confirm that you wish to import the data.

- Click <u>Yes - replace all account information</u> to finish the process of importing data. Only the records of those students included in the import file will be updated; all other Student Records will remain unchanged.

4.4   Exporting supervision report data

You may export data on supervision reports held on CamCORS to your local computer. This may be useful if, for example, you want to create an e-mail list of your supervisors or students, or simply want to view CamCORS data in your own spreadsheet or database package.

To export data:

- Choose <u>View or process reports</u> from the main menu.

- Use the search and selection facilities to identify the reports you are interested in. (See Section 3.3 for more details.)

- From the 'Actions' section at the bottom of the 'Report Search and Selection' page, click on <u>Export data</u>.

- A page appears detailing all the information CamCORS holds about reports. Select the fields you want to be exported.

- As with all data files handled by CamCORS, the file exported is in CSV format, with one supervision report per line. If there are already new line characters in any of the fields exported (most commonly, the report text), they must be replaced. The default is to replace them with the code \n. If you want a different replacement, enter it into the small box at the bottom of the form.

- Click <u>Export selected fields</u>, and save the file you are offered onto your hard disk (or open it directly into your favourite application.) By default, the name of this file takes the form `camcors_report_data_yyyymmdd.csv`, where `yyyymmdd` represents today's date.

The exported file contains a fixed number of fields, depending on which were chosen on the export page. Its first line contains headings explaining the content of each column. The leftmost column, 'Repeat', is the number of reports which share the same values for all the data you requested to be exported. Thus, if you asked to export only supervisors' details, each supervisor would have a single line in the exported file, with the 'Repeat' field containing the number of reports in the database that were written by that supervisor. On the other hand, if you asked to export supervisors' details together with the 'Report state' field, there would be one line for each unique supervisor/state combination.

If you want to insist on having a single line for each report, for example for preparing statistics in a spreadsheet, you should tell CamCORS to export the XRNLI code in addition to the data you require. Since the XRNLI code is unique to each report, no two lines in the exported file will be identical.

To return to CamCORS from the 'Export data' page, click on <u>Main menu</u> at the top of the page.

4.5   Managing payment of Supervisors

By selecting <u>Manage Supervisor Payment Data</u> you may access options permitting mass updates of reports and the download of payment information in a machine-readable form suitable for importing into your College's payment software.

Marking reports as processed for payment

The College Office can process for payment all reports which have been both

submitted by the supervisor, and

approved for payment by the Senior Tutor, the student's Director(s) of Studies, or the College Office acting on their behalf.

Colleges are expected to use their existing financial systems to make payments to supervisors. When you come to process reports for payment, you should tell CamCORS which of the available reports you want to process, and then obtain their particulars by downloading them as a file.

This information is kept for archival purposes, and can be retrieved at any time. However, since CamCORS only knows when reports were *marked* as processed (the actual payment will have been carried out by a different system) you should only mark as processed reports which you are ready to carry through to completion.

To mark submitted, approved reports as processed:

- On the main menu, click <u>View or process reports</u>. You will be taken to the 'Report Search and Selection' page.

- Run a search for pending reports by selecting 'Payment pending' from the 'Report state' section. Include other search criteria if required, and click <u>Search for Reports</u>. See Section 3.1 for more information on searching.

- Select those reports which you want to process now.

- Click <u>Mark as processed for payment</u> in the Actions area. You will be asked to confirm this action, since it is irreversible. College Offices need not process all pending reports together; they may instead mark individual reports, or sets of reports, as processed for payment.

- Click <u>Yes - Make changes</u>.

Alternatively, you may deal with all pending reports at once:

- Choose <u>Manage Supervisor Payment Data</u> from the main menu.

- Click <u>Mark all approved, unpaid reports as processed for payment.</u> You will be taken to a confirmation page, which will display the number of reports which are about to be marked as processed.

- Click <u>Yes - Mark reports as processed for payment</u>. You will be returned to the 'Management of Supervisor Payment Data' screen.

Downloading payment details of reports

Whichever method you choose for marking reports as processed for payment, you should now download the payment details of the processed reports, so that you can load them into your College's payment system.

- If you are not already on the 'Management of Supervisor Payment Data' screen, click <u>Manage Supervisor Payment Data</u> on the main menu.

- Ensure that *both* the text boxes contain today's date in the form dd/mm/yyyy, so that you only export those reports which you have marked as processed today.

- If required, use the check boxes to filter the reports according to the payment method requested by the supervisor.

- Click Download all to export the processed reports as a CSV file, which may be transferred to other systems (see Section 4.1). By default, the name of this file takes the form `camcors_payment_data_yyyymmdd`, where `yyyymmdd` represents today's date.

The downloaded file is in CSV format, with each line containing a number of comma separated fields (Section 4.1.) The first line contains the column headings; the second and subsequent rows the payment data, one row for each processed report. The fields contain the following information (reading from left to right):

Supervisor CRSid The supervisor's CRSid.

Supervisor surname The supervisor's surname.

Supervisor first name The supervisor's preferred name.

Supervisor title The supervisor's title.

Supervisor initials The supervisor's initials.

Supervisor college The supervisor's College, if applicable.

Supervisor email The supervisor's preferred e-mail address.

NI number The supervisor's National Insurance number, if they have one, or `NONE` if they do not. National Insurance numbers always take the form `XX 99 99 99 X`, where `X` and `9` represent any letter and any digit, respectively.

Date of Birth The date of birth of the supervisor, in the form `dd/mm/yyyy`.

Category One of the following official categories:

```
A1 - CTO or NUTO of this college,

A2 - CTO or NUTO of another college,

B - UTO and Fellow of this college,

C - UTO and Fellow of another college,

D - UTO but not a Fellow of any college,

E - Research Fellow of this college,

F - Research Fellow of another college,

G - Other College Fellow,

H - University Fellow or Research Associate,

I - Postgraduate student,

J - Other,

K - Unknown.
```

Corresp. address The supervisor's address for payment, if being paid by cheque. New lines are represented by the string \n.

Corresp. postcode The postcode of the supervisor's payment address.

Home address The supervisor's home address for tax purposes.

Home postcode The postcode of the supervisor's home address.

Payee One of the words SUPERVISOR, COLLEGE, or NONE, indicating who is to be paid for this report.

Payment method One of the words BACS, CHEQUE, COLLEGE, or NOPAY, indicating how the supervisor prefers to be paid.

Cheque name The payee name for payment by cheque. If the 'payment method' field is not CHEQUE, this will be n/a.

Bank The name of the supervisor's bank. If the 'payment method' field is not BACS, this and the next five fields will be n/a.

Branch The name of the supervisor's bank branch.

Bank address The address of the supervisor's bank.

A/C number The supervisor's bank account number.

Sort code The sort code for the supervisor's bank.

A/C name The account name for the supervisor's bank account.

Building Society Ref The Building Society reference number. In order to identify building society accounts for payment by BACS, this reference number may be required in addition to the account number.

If the 'payment method' field is not BACS, this and the previous six fields will be n/a.

Student CRSid The student's CRSid.

Student surname The student's surname.

Student first name The student's preferred name.

Student title The student's title.

Student initials The student's initials.

GS1 The number of hours of supervision attended in a group of 1.

GS2 The number of hours of supervision attended in a group of 2.

GS3 The number of hours of supervision attended in a group of 3.

GS4 The number of hours of supervision attended in a group of 4.

GS5 The number of hours of supervision attended in a group of 5.

GS6 The number of hours of supervision attended in a group of 6 or more.

6+ size The actual group size, for supervisions of 6 or more.

Missed The number of hours of supervision the student has missed.

To come The number of hours of supervision the student is yet to receive.

Tripos The H01 code for the Tripos Part the student is studying.

Paper The H03 code for the paper the student is studying, or `ZZZ!` if the supervisor selected 'Not specified' for this option.

Term One of the words `Michaelmas`, `Lent`, or `Easter`.

Year The calendar year in which the relevant Term fell (four digits).

Approved by The CRSid of the person who approved payment for the report.

Estimate CamCORS' estimate, in pence, of the amount due to the supervisor. This figure is based upon the payment rates agreed for the year by the Senior Tutors' Commitee, and the number of supervisions attended at each group size.

XRNLI A unique code for the report and associated claim represented by this row.

Date processed The date on which the data for this report and associated claim was marked as 'processed for payment' within CamCORS.

Downloading payment totals

- If you are not already on the 'Management of Supervisor Payment Data' screen, click Manage Supervisor Payment Data on the main menu.

- Select an appropriate date range if you do not wish to generate a report pertaining only to the current day.

- If required, use the check boxes to filter the reports according to the payment method requested by the supervisor.

- Click Download totals to export the processed reports as a CSV file, which may be transferred to other systems (see Section 4.1). By default, the name of this file takes the form `camcors_payment_totals_yyyymmdd`, where `yyyymmdd` represents today's date.

The downloaded file is in CSV format, with each line containing a number of comma separated fields (Section 4.1.) The first line contains the column headings; the second and subsequent rows the payment data, one row for each processed report. The fields contain the following information (reading from left to right):

Payee One of the words `SUPERVISOR`, *A COLLEGE* (*e.g.*, `NEW HALL`), or `NONE`, indicating who is to be paid for this report.

Payment method One of the words `BACS`, `CHEQUE`, `COLLEGE`, or `NOPAY`, indicating how the supervisor prefers to be paid.

Supervisor CRSid The supervisor's CRSid.

Supervisor surname The supervisor's surname.

Supervisor first name The supervisor's preferred name.

Supervisor title The supervisor's title.

Supervisor initials The supervisor's initials.

Supervisor college The name of a college, or the word NONE

Supervisor email The supervisor's preferred e-mail address.

NI number The supervisor's National Insurance number, if they have one, or NONE if they do not. National Insurance numbers always take the form XX 99 99 99 X, where X and 9 represent any letter and any digit, respectively.

Date of Birth The date of birth of the supervisor, in the form dd/mm/yyyy.

Coresp. address The supervisor's address for payment, if being paid by cheque. New lines are represented by the string \n.

Coresp. postcode The postcode of the supervisor's payment address.

Home address The supervisor's home address for tax purposes.

Home postcode The postcode of the supervisor's home address.

Cheque name The payee name for payment by cheque. If the 'payment method' field is not CHEQUE, this will be n/a.

Bank The name of the supervisor's bank. If the 'payment method' field is not BACS, this and the next five fields will be n/a.

Branch The name of the supervisor's bank branch.

Bank address The address of the supervisor's bank.

A/C number The supervisor's bank account number.

Sort code The sort code for the supervisor's bank.

A/C name The account name for the supervisor's bank account.

Building Society Ref The Building Society reference number. In order to identify building society accounts for payment by BACS, this reference number may be required in addition to the account number.

If the 'payment method' field is not BACS, this and the previous six fields will be n/a.

GS1 hours The number of hours of supervision in a group of 1.

GS2 hours The number of hours of supervision in a group of 2.

GS3 hours The number of hours of supervision in a group of 3.

GS4 hours The number of hours of supervision in a group of 4.

GS5 hours The number of hours of supervision in a group of 5.

GS6+ hours The number of hours of supervision in a group of 6 or more.

Total hours The total number of hours supervised

Payment estimate (pence) CamCORS' estimate, in pence, of the amount due to the supervisor. This figure is based upon the payment rates agreed for the year by the Senior Tutors' Commitee, and the number of supervisions attended at each group size.

Downloading historical payment data

You can use the same form to obtain details about payments that have been processed previously, for example during a tax year.

- If you are not already on the 'Management of Supervisor Payment Data' screen, click Manage Supervisor Payment Data on the main menu.

- Enter a date range in the two text boxes, in the format dd/mm/yyyy. Leading zeros are expected, *i.e.* 03/09/1989 and not 3/9/89. When downloading historical payment data, you can choose reports which were marked as processed in any date range (and not just 'on or after' a date.)

- If required, use the check boxes to filter the reports according to the payment method requested by the supervisor.

- Click Download to export the processed reports as a CSV file, which may be transferred to other systems (see Section 4.1). By default, the name of this file takes the form camcors_account_data_yyyymmdd, where yyyymmdd represents today's date (note: *not necessarily* either end of the date range you requested.)

4.6 Managing inter-College payments

Supervisors may select 'Pay my College' as their preferred method of payment. Although the actual payment is expected to take place under existing arrangements, it is useful for College Offices to be able to see information about payment due from other Colleges, including estimates of the amount due. This information may be viewed online or downloaded as a CSV file.

CamCORS provides information about payments due to a supervisor's College from other Colleges.

- On the main menu, choose List Payments Due from other colleges.

- Either specify the year and term desired, or enter a date range in the two text boxes, in the format dd/mm/yyyy. Leading zeros are expected, *i.e.* 03/09/1989 and not 3/9/89.

- Click Show payments due to display a list of reports submitted within that date range, for which the supervisor requested that your College should be paid. The list is sorted first by College, and then by supervisor.

- *Alternatively*, click Export CSV file to save a CSV file containing this information to your local hard disk. By default, the name of this file takes the form `payment_due_yyyymmdd`, where `yyyymmdd` represents today's date (note: *not necessarily* either end of the date range you requested.)

The downloaded file is in CSV format, with each line containing a number of comma separated fields (Section 4.1.) The first line contains the column headings; the second and subsequent rows the payment data, one row for each processed report. The fields contain the following information (reading from left to right):

Paying college The name of the College from which you are due payment.

Term One of the words `Michaelmas`, `Lent`, or `Easter`.

Year The calendar year in which the relevant Term fell (four digits).

Supervisor crsid The supervisor's CRSid.

Supervisor surname The supervisor's surname.

Supervisor title The supervisor's title.

Supervisor first name The supervisor's preferred name.

XRNLI A unique code for the transaction represented by this row.

H01 code The H01 code for the Tripos Part the student is studying.

Submission date The date on which the supervisor submitted this report.

State The current state of the report, whether claimed, approved, refused, or processed.

1 The number of hours of supervision attended in a group of 1.

2 The number of hours of supervision attended in a group of 2.

3 The number of hours of supervision attended in a group of 3.

4 The number of hours of supervision attended in a group of 4.

5 The number of hours of supervision attended in a group of 5.

6 The number of hours of supervision attended in a group of 6 or more.

6+Size The actual group size, for supervisions of 6 or more.

Estimate (pence) CamCORS' estimate of the amount due to the supervisor, based upon the payment rates agreed for the year by the Senior Tutors' Commitee, and the number of supervisions attended at each group size. This is expressed as a whole number of pence.