CamCORS

Cambridge Colleges' Online Reports for Supervisions

Version 4

Manual for Supervisors

February 22, 2006

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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 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):

- 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.

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[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.
[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 pass-words, 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

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[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

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[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.

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[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

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. (See Section 2.8) 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.

Obtaining a Supervisor account on CamCORS

Senior Members of the University or of a College (*i.e.* members of the Regent House) are entitled to register for CamCORS directly, either through

the WWW form at https://jackdaw.cam.ac.uk/camcors/register

If you also have a College role at one or more Colleges, for example as a Tutor or Director of Studies, you should consult the relevant College Office(s) for details of how to obtain College roles on CamCORS.

Obtaining a Supervisor account as a graduate student

Graduate students, or any other persons wishing to supervise who are not members of the Regent House, may not directly register themselves for CamCORS Supervisor accounts. To obtain an account, contact either:

a College, whether your own or one for which you have been asked to supervise (you may use the generic e-mail address `supervisions@college.cam.ac.uk` for this purpose), or

the Course Director for the relevant course in the Department or Faculty where you are supervising.

The College or Faculty will then pass on your application to the Computing Service, who will send you a password for your first CamCORS session.

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

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[7]or whichever other system is appropriate

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,

the main menu, allowing you to perform various actions within CamCORS, and

The summary table

This table contains summary information about the reports you have created, so you can see at a glance what you need to do.

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

Created You have created the report, but have not yet submitted it.

Submitted You have submitted the report, but the College has not yet taken any action.

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

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

Processed As a result of the approval of the student's 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, so you should allow some time after reports reach this state.

Each of the five states in this table is independent, thus the total of all cells is also the total number of reports which you have created in CamCORS' database.

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:

Create new supervision reports If you do not wish to clone an existing supervision report, you may generate new reports from scratch using this option. (Section 4.1.)

Edit or view supervision reports Choose this option to search for and edit reports that you have created (Section 3.1.)

Manage payment claims Choose this option to manage reports that you have not yet submitted, or to view claims you have previously made (Section 4.6.)

Change personal details Choose this option to enter, update, or correct the information CamCORS holds about you, such as your contact details and payment information (Section 2.8.)

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 Changing your details

The main menu option Change personal details allows you to see all the information CamCORS holds about you, and to alter it if necessary.

It is important that you review this information periodically, and check that it remains current. If it is not current and complete, Colleges will encounter problems when they come to process your claims for payment. Your information is *not* submitted to Colleges along with the reports, but fetched from the database when your claims are processed. If you have submitted some reports and your circumstances change, keeping your details up to date will ensure that Colleges can pay you in the correct manner.

You do not have to fill in all the fields at once, but you will not be able to receive payment for any reports until you fill in all the required fields *and* tick 'This form is complete'.

The fields available are:

Preferred name Your preferred first name. Both this and the next field must be completed.

Surname Your surname.

Title Your title, *e.g.* Ms., Dr., Prof.

Status Your status; choose the item from the drop-down list that best applies to you.

College The College to which you are affiliated. If you do not have a College, choose "I have no College", and ensure you have filled in your correct correspondence address in the fields below.

Email address An e-mail address where you may be reached. As a supervisor you may use any e-mail address, though e-mail sent to you through CamCORS in any other role will assume an e-mail address of the form `crsid@cam.ac.uk`. You may use any e-mail address as your preferred contact address, and not only your `crsid@cam.ac.uk` address.

Correspondence address A postal address where you may be reached. If you have selected 'I have no College' above, this and the next field must be completed. If you leave these fields blank, Colleges using CamCORS will contact you through your own College.

Postcode The postcode for your correspondence address.

Home address Your home address for tax purposes, if different from above. (This is not currently required, but may become so in future versions of CamCORS.)

Postcode The postcode of your home address.

Payment method The default way you would like to be paid for your supervision work. One of 'Pay me directly (preferably by BACS)', 'Pay me directly (preferably by cheque)', 'Pay my college', and 'I do not require payment'. If you choose 'Pay my College', you must have selected a College from the drop-down list above. You should choose 'I do not require payment' only if neither you nor your College require payment for supervisions. As part of the personal details held about you on CamCORS, you can specify that you do not generally require payment for supervisions. The option 'Pay my College' means that payment should be made to your college rather than to you personally.

Note that the payment method can also be selected on a report-by-report basis (see Section 4.2.)

The payment method field here is the default setting that is copied on to all newly created report forms. The payment method you have chosen as the default setting can be varied for individual reports or batches of reports without changing the default setting (see Section 4.2.)

Account name The name on your bank or building society account. Bank, etc., details *must* be filled in, because some Colleges will only pay supervisors via direct bank transfer. Even if you have selected 'Pay my college' or 'I do not require payment' as your default setting, you must fill in bank details to enable direct bank transfers to be made if you later choose 'Pay me directly...' for an individual report (see section 4.2.) All your personal details are subject to Data Protection legislation, and will not be divulged by CamCORS or its administrators except to authorized parties.

Account number The number of your bank or building society account. This must be an eight-digit number; if your account number has fewer than eight digits, you should prefix it with zeros.

Sort code The sort code of your bank or building society account. This must take the form `99-99-99`, where `9` represents any digit.

Building society ref. This may be needed if you wish payment to go to a building society account. If you are unsure then contact your building society or seek guidance from your college. It may not be longer than twenty characters.

Branch name The name of your bank or building society branch.

Branch address The address of your bank or building society branch.

Cheques payable to The name to which cheques should be made payable. This field must be filled in, because some colleges insist on paying by cheque. Even if you have selected 'Pay my college' or 'I do not require payment', you must fill in this field in case you later choose 'Pay me directly...' for an individual report (see section 4.2.)

I am a graduate student with no NI number Check this box if you do not have a National Insurance number. If you have a National Insurance number, the NI field must be filled in, and this box must not be checked.

NI Number Your National Insurance number, if you have not checked the box above. It must be of the form `XX 99 99 99 X`, where `X` represents any letter and `9` any digit, for a total of thirteen characters. If you are *not* a graduate student, and do not have an NI number, and nevertheless require payment, you must make arrangements outside CamCORS with the College which will pay you. For CamCORS purposes, pretend to be a graduate student without an NI number.

Date of birth Your date of birth, in the form `dd/mm/yyyy`. Leading zeros are required, *i.e.* `03/09/1989` and not `3/9/89`.

This form is complete Check this box to certify that your details are complete and correct. You may untick this box at any time if you know you will need to revise the data; you will then be prevented from making further claims until you have updated your details and ticked the box once more. There is an additional box on the Personal Details page, which tells CamCORS when you believe your details to be correct and complete. You will not be able to submit reports whilst this box remains unchecked.

When you have completed the form and checked the 'This form is complete' box, click Save changes to register your new details. If you have not completed the details in a way that satisfies the requirements of CamCORS, you will be invited to resubmit the form. Red lettering will draw attention to the field you need to correct or to fill in before you can claim for payment, and prominent messages will be displayed at the top of the page enumerating what details remain to be provided.

3 Viewing and processing reports

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

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 Anthonys, 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 <u>http://www.cam.ac.uk/global/search/</u>. 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.

Student college The name of the student's College.

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 designated by you when you created the reports. 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.

Predicted class The class predicted by yourself for students on whom you have submitted reports.

College action Check this box to search for reports where you recommended that College action be taken.

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.)

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.

College The student's College.

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.)

Rel. 'Yes' if this report has been released by the appropriate College authority for viewing by the student; 'No' if it remains unreleased.

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 Term 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.

3.3   Viewing reports

Once you have made a selection, click Edit or view to display the full 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 Section 4.2), the Save Changes button.

Full reports are not normally available to Course Directors.

3.4   Printing out 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 second 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 <u>Yes</u> 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 <u>Back to report summaries</u> 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 <u>Export data</u> facility. See section 5.2 for more details.

3.5   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 described 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. Thus, to send an e-mail to all of your students (*e.g.* in case of illness,) you would run a search for all relevant reports and click Email.

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. (In the above example, you would click on the Students link.) 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 simultaneously,

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 second 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 supports 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 e-mail address (as given by you on your Personal Details page; see section 2.8.) 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.

3.6 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].

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

Supervision reports may be read by the Director of Studies, Tutor[2] and Senior Tutor. Non-attendance or poor performance at supervisions is often an early warning sign for the College that a student is experiencing difficulties of a non-academic nature, which it may be important for your Tutor or other pastoral caregiver to know about.

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[2]or person in equivalent position, *e.g.*, a Tutorial Advisor

4 Writing reports

4.1 Creating supervision reports

You should create supervision report forms as soon as you know which students you are supervising, whether you have been asked to supervise by a Director of Studies, a Course Director in a department or faculty, or directly by the student where this is a recognised procedure. This is so that the student's College can check that supervision arrangements are in place. You need take no further steps to inform the College that you are supervising the student. In addition, the created reports will contain e-mail links allowing you to keep in contact with the students to confirm or change your supervision arrangements.

Once you have created the reports, they will be visible in stub form (see section 3.3) to the student (if their College allows it), their Tutor(s), Director(s) of Studies, Senior Tutor, College Office or any appropriate Course Director. They will remain visible only in this form until you submit the completed report. If you write reports and save without submitting (section 4.2) your work will remain visible only to you.

Creating new reports

Reports need not be created from scratch; you may duplicate information from reports you have already created (See section 4.1).

To create reports manually:

- Select Create new supervision reports from the main menu. You will be presented with a new webpage containing a form requesting the Tripos Part you are supervising.

  Note that the order of the examinations in the list is by H01 Code. This ordering is broadly alphabetical by Tripos name, but groups together with standard Tripos Parts all the Preliminary Examinations, Qualifying Examinations, Diplomas and Certificates associated with that Tripos. A list of H01 codes is available at http://www.admin.cam.ac.uk/offices/students/codes/h01.html.

  CamCORS tries to remember your "favourite" courses, to save you from hunting through the Tripos list or memorising H01 codes; courses in respect of which you have ever submitted a supervision report should appear both at the top of the list and in their alphabetical place. The same scheme applies to searching for reports.

- Click Create. You will be taken to a 'Creation of New Supervision Report Forms' page.

- Choose the paper for which you are supervising from the drop-down list, or 'Not Specified' if this is not applicable. The paper titles are the official (H03) titles for all examination options in this part of the Tripos. A full list is available at http://www.admin.cam.ac.uk/offices/students/codes/h03.html.

If the subject you are supervising is not supervised according to to particular papers, but some other division (*e.g.* subject area,) choose 'Not specified' from this list. You should then be sure to describe the topic you are supervising in the next box.

- In the box below, type in a brief (up to 50 characters) description of the topic of your supervisions, if the paper title is insufficient. This description will appear in the stub report form as soon as the report is created. Your department or faculty may recommend a particular description to use for each topic; in any case, you should use a consistent form for the topic, so that you and others can easily search for reports concerning a particular topic (see Section 3.1.)

- Use the next two drop-down lists to select the term in which you are giving the supervisions, if different from the current term. The payment you will receive is determined by the rate applicable to the term you choose.

- Type the CRSid of all the students you are supervising for this topic into the large text box, putting one CRSid on each line. You do not have to create a report form for each student separately; there is no practical limit on the number of report forms you can create in a single action. If the Director of Studies or Course Director has supplied you with the CRSids in a suitable form[1], you need only highlight, copy and paste them into the text box. You might find it useful to create a file (e.g. on your computer's desktop) in which you store CRSids sorted by Tripos Part so that you can create new reports if you are supervising the same people for different papers or topics later in the year. If you will only be supervising the students for the same Tripos Part, the same paper and the same topic you can also clone and update new reports ones created earlier (see Section 4.1.)

- Check the details you have entered, and click <u>Create Reports</u>. After a confirmation screen, you will be invited to return to the Main Menu.

Problems creating reports

If you do not have the CRSids of the students for whom you wish to create reports, you should obtain them by contacting the person who asked you to supervise, the relevant College's `supervisions@college.cam.ac.uk` address, or the students by some other means. Alternatively, you may be able to find the CRSids using the University's e-mail search facility at <u>http://www.cam.ac.uk/global/search/</u> (depending on the students having consented to their publication.) Remember that the CRSid is only the text to the left of the `@` in a student's `@cam.ac.uk` e-mail address, and not the whole address.

If you attempt to create reports for a student who is not taking the specified Tripos in the term and year you selected, you will be shown an error message and returned to the 'Creation of New Supervision Report Forms' page. You should first check that the CRSid of the student(s) referred to in the error report is correctly entered.

If you are sure that the CRSid is correct, you should confirm that you have entered the student in the correct Tripos Part. It is worth remembering that some students who are

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[1]CamCORS is reasonably tolerant of attempts to paste in email-style addresses with various quotation marks; *e.g.*, entering ˜`Kat. O'Shea`˜ `<kao20@cam.ac.uk>` will yield just the CRSid `KAO20`

supervised for Part II (or, in a minority of cases, Part IB) may be entered for the Preliminary Examination, rather than for the Tripos. Directors of Studies and Course Directors are advised to inform you of students' Tripos Parts, together with their CRSids, when they ask you to supervise. If you have not received this information, you should contact the person who asked you to supervise. A similar problem might arise if a student is being supervised for a Qualifying Examination as a medic or vet, where that examination is available both as an Exemption and as part of the Tripos.

If you are certain that the CRSid and Tripos Part are both correct, then you should contact the student's College at its `supervisions@college.cam.ac.uk` address to sort out the problem. The College may need to check and correct its own data entry for this student. The University Computing Service cannot help you with this problem, since responsibility for the accuracy of data relating to students lies exclusively with their Colleges.

Creating sets of reports by cloning other report forms

CamCORS has a facility permitting the creation of multiple copies of supervision report forms; this can be used to avoid re-entering details such as Tripos parts and student identities.

To clone reports for a new term:

- On the Report Search and Selection page, find and select the reports you want to clone (see Section 3.1.)

- In the first row of the Actions panel, select Clone report forms.

- Provided you have not attempted to create forms for students not taking the Tripos specified, you should now be presented with the Creation of New Supervision Report Forms form, but with its details already filled in, but on the basis of the cloned reports you specified. You may now change any of the details on this form, and should then select Create reports in the usual way.

If you attempt to create reports for a student who is not taking the Tripos of the original report in the term and year you selected, you will be shown an error message and returned to the Report Search and Selection page.

New report forms may be created by cloning reports from previous terms.

4.2   Writing reports

When you have created report forms, you (and only you) can see them in their full form. There is no need to write the reports all at once. You may find it useful to use the forms to keep a record of the number of hours of supervision you have agreed to give and for which you will claim payment, how many have been missed and how many are yet to come. You can also keep notes on the supervisions as you give them, which can then be edited into a final report before submission. CamCORS will keep these notes accessible only to you until you have submitted the report. Note, however, that the text box has a maximum size of 16 lines each of 60 characters.

If you do this, you will have access to your supervision reports, and any notes you have made over the course of the term, from any computer with secure Internet access.

As always, you should save your work regularly, say every 10–15 minutes. Whilst writing reports, you may wish to save the text (and any decisions you record) after you have finished working on each report. You can continue to edit your reports as you like, including deleting them entirely, at any point up to the moment you submit it. You *must* save any changes you wish to keep before leaving the 'Report Viewing and Editing' page for any reason.

To reach the 'Report Viewing and Editing' page:

- Click <u>Edit or view supervision reports</u> on the main menu.

- Find and select a group of reports which you wish to edit (see Section 3.1.)

- Click <u>Edit or view</u> in the first row of the 'Actions' panel.

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 <u>Cancel</u> button at the bottom, or if you have made changes you wish to save (see below), the <u>Save Changes</u> button.

Each report consists of three sections: a header at the top, the body of the report below it, and a footer at the bottom.

The report header

The header contains basic administrative information common to all reports, as well as providing some useful e-mail links (Section 3.5.) 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,

- 'Supervised by', followed by your 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 should be used for 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 their College has released it.)

If you have created a report but not submitted it, College users will be able to see a stub report consisting of this header only.

The body of the report

The report body is divided into three sections.

Ratings

At top left are drop-down boxes for recording the customary standard broad judgments on a student's progress:

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; either a single class, a pair of adjacent classes, or 'Not specified'.

If you wish to give emphasis or nuance to your judgements, you should elaborate in the main text of the report.

If you use a wheel on your mouse to scroll through the drop-down lists, remember to deactivate the list before making further use of the wheel.

Attendance

This section of the report is very important. It records the number of hours' supervision for which you are claiming payment. The payment rate is based on an *hourly* rate determined annually by the Senior Tutors' Committee in agreement with the Bursars' Committee. It is not the number of supervisions: if you give four two-hour supervisions, you need to claim for eight hours. Part hours can be claimed up to two decimal places, *e.g.* 1.25. Boxes you leave blank will be interpreted as zero.

Payment is determined by multiplying the number of hours you have given by the standard rate for one student in groups of different sizes. Enter the total number of hours for which you expect to be paid in the relevant text box on the bottom row. The top line gives the number of students in the group; the first five boxes have a fixed number and you need only type the number of hours in the box beneath. The sixth box defaults to 6, but you can replace this with a different group size, along with the number of supervisions organized in a group of that size below. There is a single rate that applies to all groups of six and above: each College contributes the appropriate share of the hourly payment in respect of each of its students, so for eight students from eight different Colleges, each College will pay one eighth of the total due.

Supervision is understood as small-group teaching, and the expectation is that the vast majority of supervisions will be given in groups of no greater than six. In the event that you supervise the same student for the same paper in groups of (say) seven, eight, and ten, you will have to submit three separate reports. You can use the report cloning facility to create these reports (Section 4.1) and copy and paste the text of the report from one to the other, or do one of the reports and submit supplementary reports containing only the words 'This report supplements the claim made in XRNLI-yyyy-nnn', where XRNLI-yyyy-nnn is the reference number of the original report.

It is assumed that you will be paid for supervisions the student has missed, although you should not in any event allow more than a single supervision to be missed without contacting the College, Director of Studies or Tutor (see Section 3.5) or without asking the student for an explanation. In some Colleges, students are fined (*i.e.* have to pay for themselves) supervisions missed without good cause. Supervisions should only be

recorded as 'missed' when the student has missed them through idleness or negligence; supervisions rearranged or cancelled with good reason should not be recorded in the 'missed' box. Hours of missed supervisions should be included in the total counts for each group size, as above.

It is also assumed that you will give, and be paid for, supervisions which are still to come at the time of submission. Hours to come should therefore be included in the total counts for each group size. In the event that supervisions which you have already submitted reports for are not given, you should inform the College and amend your claim, quoting the XRNLI numbers of the affected reports (see Section 3.5.)

It is very important that you claim for the correct number of hours in the correct group sizes. Your claim for hours of supervision is not only important to you, as a basis for the payment that will be made, but also to the student as a record of their attendance at supervisions. It may be important in the event of the reports being used in support of an application to the University for an allowance towards the degree of B.A., or in the event of an appeal against a classification in Tripos examinations. You should bear in mind that the number of hours claimed and the group sizes will be visible to the student, and that they have a proper interest in the accuracy of this information.

If the student's Director of Studies (or other authorised person) knows or believes the claim to be inaccurate, they can either refuse payment for it or return the report to you for correction, usually with an explanation. This may take the form of a comment in the 'additional comments for students' section at the bottom of the report, which will be cleared when you resubmit the form (and in any case before the report is seen by the student; see Section 4.5.)

The written report

This is the most important part of the report. The entry should be in plain text only; HTML tags will be ignored. It is intended to provide students and their advisors with a formative assessment of their work for you during the term. It should provide fair and constructive advice on how to improve, praise where it is due, criticism where it is in order. The reports should always be considered as open, not as confidential (as sometimes in the past.) Students may see their reports as they will have an entitlement to the reports for their Personal Development Files, soon to be introduced in line with national requirements. They may also request reports under the Data Protection Act. Most Colleges will allow students access to read, save, or print their reports once they have been released by their Director(s) of Studies or Tutor(s); some may allow them to be seen as soon as they have been submitted.

It will be in no one's interest if reports are vague, bland or unhelpful, but they must be fair and accurate—your opinions, however tough, should be expressed in a way that recognises they are to be read by the student and not only by your colleagues or College staff.

The length of the report is limited to 16 lines, each of 60 characters. If you really feel there is more to be said, you may follow up your report with an e-mail to Directors of Studies or Tutors (Section 3.5.)

The spellchecker

To spellcheck your report:

Whilst viewing or writing reports on the 'Report Viewing and Editing' page, click Check spelling at the bottom of the page.

The page will refresh, and a new window should open containing a skeletal copy of the reports in the same order as they were on the 'Report Viewing and Editing' page. Words that the spellchecker does not recognise will be written and underlined in red.

If the new window does not open, your browser either does not support Javascript or has it disabled. Click on the link that has appeared to open the spellchecker window without using Javascript.

In all likelihood the new window has blocked your view of the report editing window, so you may close it to return to your editing, or keep it for reference if you prefer and navigate back to the editing window by some other means.

The report footer

The final section of the report form contains various other information supplementary to the report.

College action recommended Check this box if you wish to draw the attention of Colleges to particular concerns. The text should indicate what kind of action is recommended. You may decide to follow up such reports with an e-mail (Section 3.5) or telephone call to the relevant person.

Payment method This drop down list can be used to change the method of payment you request for *this report only.* By default, the method of payment you chose in your Personal Details is selected. Note that some Colleges insist on paying supervisors in their own way; you may only use this menu to express a preference.

This report is ready to be submitted Check this box when you are happy with the report and wish to submit it. The report will be submitted when you click Save changes at the bottom of the page. Once a report is submitted, this box is replaced by text detailing the payment decision the College has made (or that the report still awaits a payment decision) and the date on which you submitted the report. See below for more information on submitting reports.

Additional comments for students Directors of Studies and Tutors may use this section to convey any comments they wish to add to the report. Each comment is prefixed with the CRSid of the person who made it.

As supervisor, you cannot write in this box; it becomes active only after submission. The College Office, Senior Tutor, Director of Studies or Tutor may add comments on the report you have submitted. Such comments can be seen not only by them, but also by you and the student if it is released. Comments added to a report that is returned to you will be erased when you resubmit.

It is imagined that this facility will normally be used to add a helpful gloss for the benefit of the student. It also, however, enables comments to be added to the report correcting errors, recording why payment was not made, or explaining why the student was not allowed to receive the report. The comments are permanent and

cannot be modified once saved. They are not intended as a substitute or alternative to communication by e-mail.

4.3 Submitting reports

Once you have filled in all the relevant parts of a report form, and are satisfied that the opinions and attendance record you have entered are fair and accurate, the report is ready to be submitted to the appropriate College. It may become visible to the student immediately you have submitted the report, depending on College policy. Alternatively, a College authority may need to make a decision to release the report to the student. You can submit reports individually if you wish, or you can submit a group of reports together.

To submit reports to the appropriate Colleges:

- Whilst viewing or writing reports on the 'Report Viewing and Editing' page, check the This report is ready to be submitted box at the bottom right of each report you wish to submit. 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, set the criteria to search for reports you wish to submit, review the list—deselecting any that you do not wish to submit at this time—and click Submit in the first row of the 'Actions' panel. The next screen will give the number of reports you are about to submit; you should check that this is what you expected, and confirm. If you wish to return to the Report Summary Page, click Cancel.

  If you have selected any reports which have already been submitted, CamCORS will generate an error message. Including the 'State: Not yet submitted' search criterion will ensure that the only reports that are listed are those awaiting submission.

Once you have submitted a report, you will no longer be able to edit it, although you will be able to see when the College makes a decision on its payment. If you discover you have made a mistake in the body of a report after submitting it, you will have to e-mail the College's `supervisions@college.cam.ac.uk` address and ask them to return the report to you. You may use CamCORS' own facilities for this: see Section 3.5.

You can continue to access any report you have written after it has been submitted, and read, save or print it as necessary.

4.4 Changing payment method

Although you have a preferred method of payment set in your Personal Details (section 2.8) you may override this for individual reports or sets of reports. You might want to do this, for example, if you give an extra supervision for which you do not expect to be paid.

The payment method is sent to Colleges at the time of processing, not the time of submission; thus, you do not need to use these methods if your circumstances change

after you submit the reports. You should instead make sure that your personal details are up to date. However, if you do override your default using these methods, and then change your default, reports which you have already overridden will not change. You cannot alter your preferred method of payment for reports once submitted.

Note that some Colleges insist on paying supervisors in a particular way; you can only use these facilities to express a preference.

There are two ways you can alter your preferred method of payment for reports:

- Whilst writing reports on the 'Report Viewing and Editing' page, choose an item from the 'Payment method' drop down list for each report whose payment method you want to change. 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.

  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 those reports from the list for which you wish to change the payment method. Choose a method from the drop-down list on the bottom row of the 'Actions' panel, and click Change payment method to:. Again, you will be shown a confirmation screen listing the number of reports that will be affected.

  You may select a payment method for individual reports, as well as having a globally preferred payment method.

4.5 Claiming payment for reports

If you have submitted supervision reports, you do not have to claim payment for them as a separate action (previous versions of CamCORS did however require this). Colleges will normally make a single total payment per term per supervisor. A report cannot be processed for payment through CamCORS until you have submitted it. If you have indicated that you do not require payment for a report or set of reports, you should still submit them so that the College can mark them as processed.

In addition, you must ensure that your personal details are current and correct before submitting (Section 2.8.) If CamCORS detects a problem with your personal details, or if you have not checked the 'This form is complete' box on the 'Change Personal Details' screen, it will not allow you to make claims.

Your reports constitute claims for payment, and are sent to the appropriate College(s), which will make a payment decision about each report. When a decision is made, you will be able to see it on the report form, together with the name of the person who made it. Three things may happen next:

- The College (*i.e.* the student's Director of Studies, the Senior Tutor, or the College Office acting on their behalf) approves payent in respect of the reports. They will pass your details, including your preferred means of payment for each report, directly to their Accounts Office; you need take no further action.

If payment has been approved and you feel that there is undue delay over the payment reaching you, first check that you have claimed for payment by doing an appropriate search (Section 3.1.) Reports must be approved before they can be processed for payment. You should e-mail the student's Director of Studies or the College's `supervisions@college.cam.ac.uk` address (Section 3.5) to prompt attention. It is, of course, sensible to allow reasonable time after approval for College processing, for BACS transfers to clear, or for cheques to arrive. If you have claimed early in the Term, you should bear in mind that supervision claims are normally dealt with towards the end of the Term for which the teaching is given.

- The College returns the report to you, in which case you will need to make alterations to it and resubmit the report. It is envisaged that Colleges will do this if you have made a clerical error, for example in reporting the number of hours supervised. If you realise that you have made a mistake which you wish to correct, you can contact the Director of Studies or the College and ask for the report to be returned to you for correction. This can be done as long as it has not already been processed for payment.

  A returned report will appear in the list as if it had been created but not yet submitted. Colleges are advised to alert supervisors by e-mail when they do this.

- The College refuses payment for the report. It will be frozen in its current state, and cannot be altered. Colleges are advised to contact you by e-mail to explain why they have refused payment.

  You will need to create and submit a revised report before payment can be made; since this report will be for the same student and paper as the refused report, you can easily create it by cloning the report whose payment was refused (Section 4.1.)

If there is a delay in making a payment decision for a report, you should know that in most Colleges it is the Director of Studies who does this; you might e-mail them to prompt attention (Section 3.5.)

4.6 Viewing payment information

You can use CamCORS to produce summaries of all the claims for payment you have made in any date range, and to predict future payments. To do either of these, first, click the Manage payment claims option on CamCORS' main menu. If you have any outstanding claims for payment (*i.e.*, reports created but not submitted), then you will be presented with information about them, followed by a form for generating historical data about received payments. Where no claims are outstanding, only the historical payments form will be visible.

Projected payment information

You will be presented with a table, organised by college, of your outstanding supervision reports and an estimate of how much you will be paid in respect of them. The estimate is made in accordance with the following assumptions: that you are paid separately for supervising and paid at the normal rate; that you have submitted accurate details of

student numbers, group sizes, and hours; and that payment will be approved in respect of each report.

Teaching for your college includes only those reports for which you have selected the payment method "pay my college". Your own college is expected to interpret this as "pay me in the normal agreed manner". By this means the total hours includes what you do for your college by way of exchange arrangements as well as directly.

Historical payment information

To see historical payment information, scroll down to the form at the bottom of the page. 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`,) and click <u>View historical data</u>.

The next screen lists the reports, grouped by term then by the students' colleges; the information displayed is the name of the student, the number of hours supervised in various group sizes, and the XRNLI number of each report are listed, together with the amount CamCORS estimated that each College would pay you for those claims.

Both the claims and a summary thereof (by term and college) may be exported as CSV files, by selecting <u>Export as CSV file</u> or <u>Export totals as CSV file</u> as appropriate. The separation of totals from the rest of the data keeps the format of the CSV files simple.

When exporting historical data for Income Tax returns you should be aware that CamCORS will employ the standard rates for supervisions, which may or may not be the same as you received.

5 Working with data files

5.1 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 Import.

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

- Check the 'commas' box, and *uncheck everything else.* Click Next.

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

- Click on Text in the Formatting Options pane.

- Click Finish.

- Click OK 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.

5.2   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 all your students, or simply want to view CamCORS data in your own spreadsheet or database package. You may export CamCORS data directly onto your own computer.

To export data:

- Choose Edit or view reports 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 Export data.

- 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.

If you attempt to export any fields whose contents you are not authorized to view, the entry in each line for that field will be exported as the string `HIDDEN`.

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.