On 5 December 2016, SITS:Vision/eVision were upgraded. The images contained in this document may not accurately reflect the latest version of SITS: Vision/eVision.

For guidance on the changes in the latest version of SITS:Vision/eVision please refer to the SITS 9.2 Upgrade Quick Reference Guide.
Assigning College Advisors

Version 3.0
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Introduction

1 Introduction

The purpose of this manual is to provide information and the process steps for assigning and removing college advisors to and from a student and assigning students to a college advisor.

1.1 Intended Audience

This manual is intended for college administrators, who are responsible for recording the college advisors for the graduate students at their college.

1.2 Pre-requisites

- Knowledge of the University processes for assigning college advisors to students
- Basic web browser knowledge
- Basic knowledge of using a computer, keyboard and mouse

1.3 Objectives

On completion of this manual you will be able to:

- Assign college advisors to students
- Remove college advisors from a student
- Assign students to college advisors

1.4 Conventions

- Indicates additional useful information.
- Indicates an important piece of information, take particular care to read this information.
- Indicates there is something that you should not do, take particular care to read this information.

**Bold Text** Indicates menu names.

*Italic Text* Indicates window, screen or dialogue box titles.

[F4] Keys on your keyboard are indicated in **bold text** enclosed in square brackets [ ].

**File > Open** Moves through a navigation path are indicated with a >. In this case you would click on the **File** menu, then select **Open**.
# 2 Login and Logout of eVision

To access the Quick Reference Guide with instructions on how to login and logout of eVision, please enter the URL below or use the following link and select “Access and Navigate eVision” under the eVision link.

[https://www1.admin.ox.ac.uk/studentsystems/support/guides/](https://www1.admin.ox.ac.uk/studentsystems/support/guides/)
3  Retrieve Student, Add College Advisors Functionality

1) Click on the Student Records link in the menu on the left to display the Student records functionality screen.

   ![Student records functionality screen]

Note: College Records users can access ‘Retrieve Student, Add College Advisors’ through the College Records button.

3.1  Searching for Student(s) to Add a College Advisor to

1) Click the Retrieve Student, Add College Advisors link to display the Find student screen.

   ![Find student screen]

2) Enter the required data:
a) **Enrolment Status**

b) **Course Type**

c) **College** (Only the college(s) you have access to will appear).

All other fields are optional but use is encouraged to return more precise results.

You can return to the ‘Student Records’ page by clicking on [Return to Student Records Functionality](#).

- The Clear button will remove any entered/selected parameters.

3) Click on [Search](#) to display the ‘Select student’ to add screen.

**3.1.1 Ordering Search Results by Column Heading**

1) Click the up or down arrow to the right of the relevant column heading to order your search results in ascending or descending order e.g. by Number of College Advisors.
3.1.2 Refine Search Results

1) Enter free text search criteria into the ‘Search’ textbox at the top right of the screen. The search results will automatically adjust according to the search criteria entered.

3.1.3 Copy Search Results

1) Click on Copy to copy the search results.

3.1.4 Save Search Results as an Excel File

1) Click on Excel.

2) A standard browser Save as dialogue box opens.

3) Select the location you wish to save the search results, re-name the file (if required) and click Save.
3.1.5 Print Search Results

1) Click on **Print** to display a print preview of the search results and use your browser’s functions to print.

2) Press Esc in your keyboard to return to the *Select student to add* screen.
3.2 Adding and Removing a Student’s College Advisor(s)

3.2.1 Adding a Student’s College Advisor

1) Search for the student you wish to add a College Advisor to (see section 3.1 for guidance).

2) Click on **Select** to the right of the student you wish to assign a college advisor to, to display the Student profile screen.

3) Click on **Edit college advisors** to display the Edit college advisors screen.

4) In the ‘Please enter a name to add a new college advisor’ field, enter the name or web authentication ID of the college advisor and click on **Add**.
The ‘Please enter the name to add a new college advisors’ field is a dynamic search box and will display up to 25 matching names/single sign-on username details based on what is typed in to the field.

5) The college advisor will appear in the ‘Existing college advisor details’ section of the Edit college advisors screen.

6) It is possible to add more than one College Advisor to a student.

7) To add another College Advisor to the same student start from step 3 or choose Back and Select New Student to find the student and start from step 2.

3.2.2 Removing a Student’s College Advisor

1) A student’s College Advisor can be removed by locating the student (follow steps 1 and 2 from section 3.2.1) and selecting Edit College Advisors.

2) Click on Remove to take out the assigned college advisor, if required.

3) Choose Next and the College Advisor will be removed from the student’s record.

4) Click on Back to return to the Student profile screen.

The College Advisor who was removed, and any previously removed College Advisors, can be found under the ‘Display previous college advisors’ link. See Section 3.2.3.
3.2.3 Viewing Previous College Advisor(s)

1) Click on ‌next to Display previous college advisors.

2) A table of previous college advisor(s) will appear.
4  Retrieve College Advisor, Add Students Functionality

1) Click on the **Student Records** link in the menu on the left to display the **Students records functionality** screen.

4.1  Searching for a College Advisor to add students to (individually)

1) Click on the **Retrieve College Advisor, Add Students** link to display the **Find College Advisor** screen.

Note. To return data, ensure that a College has been selected, and a value has been entered for either SSO Username, Forename, or Surname. Wildcards can be used as part of the search (e.g. ‘Smith*’ in the surname field would return all surnames beginning with ‘Smith’; Smithers, Smithson etc).

Note. The Clear button will remove any entered/selected parameters.

2) Enter the required data:
Retrieve College Advisor, Add Students Functionality

a) **College** – all colleges will appear in the dropdown list

You can return to the Student Records page by clicking on Return to Student Records Functionality.

3) Click on **Search** to display the Select college advisor screen.

4) If you have multiple search results then you can click the up or down arrow to the right of the relevant column heading to order your search results in ascending or descending order e.g. by Full Name.

You can return to the Student Records page by clicking on Return to 'Find College Advisor'.

5) Click on **Select** to the right of the college advisor you wish to assign students to, to display the Find Student screen.

6) Enter the required data:
   a) Student Number (you can enter more than one by separating numbers using a comma)
   b) Year of Programme
   c) Award Programme
   d) Enrolment Status (All Students, Enrolled, Returning, or Fresher)
   e) College (only the college(s) you have access to will appear)

Choosing **Select new college advisor** will return you to the Select College Advisor screen.

7) Click on **Select** to display the Select student screen.
8) Click the up or down arrow to the right of the relevant column heading to order your search results in ascending or descending order e.g. Supervisory team. Those with no college advisor will appear at the top.

9) To add each student individually then click on the Add button to the right of the student you wish to assign to the college advisor to display the Student added screen. The Supervisory team and Action column are highlighted in green when updated.

10) If you return to this record later, then you will see the updated record and a ✗ instead of the Add button.

4.2 Searching for a College Advisor to add students to (multiple)

1) Follow steps 1-7 from section 4.1. The students returned in step 6 should be all of the students you intend to add to the college advisor.
2) Choose **Add all students to this advisor where the relationship does not yet exist**

3) The following pop-up will appear. Choose OK.

4) The Advisor will be added to all students listed and the Supervisory team and Action columns updated.

5) Further students can be assigned to the same college advisor without starting again at the beginning on the task. If you wish to continue adding students to this advisor then choose the *Search for more students to add to this advisor*. To add students to a different advisor then you can choose the *Search for new advisor* button or choose *Finish* to return to the *Student Records Functionality* screen.
5  Further Help & Information

5.1  Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University's student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre website:

http://www.admin.ox.ac.uk/studentsystems/

5.2  Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford's IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

http://www.admin.ox.ac.uk/aad/studentsystems/programme/

5.3  Data Protection

You should familiarise yourself with the University’s policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/policy/

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml

5.4  Document Information

This document is subject to change, please ensure you have the latest version.

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<thead>
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<th>Revision Date</th>
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<td>Gillian Crosby</td>
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<td>Abi Taylor</td>
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