

# Master Set Creator (MSC) Process

**[Personal Academic Tutoring]**

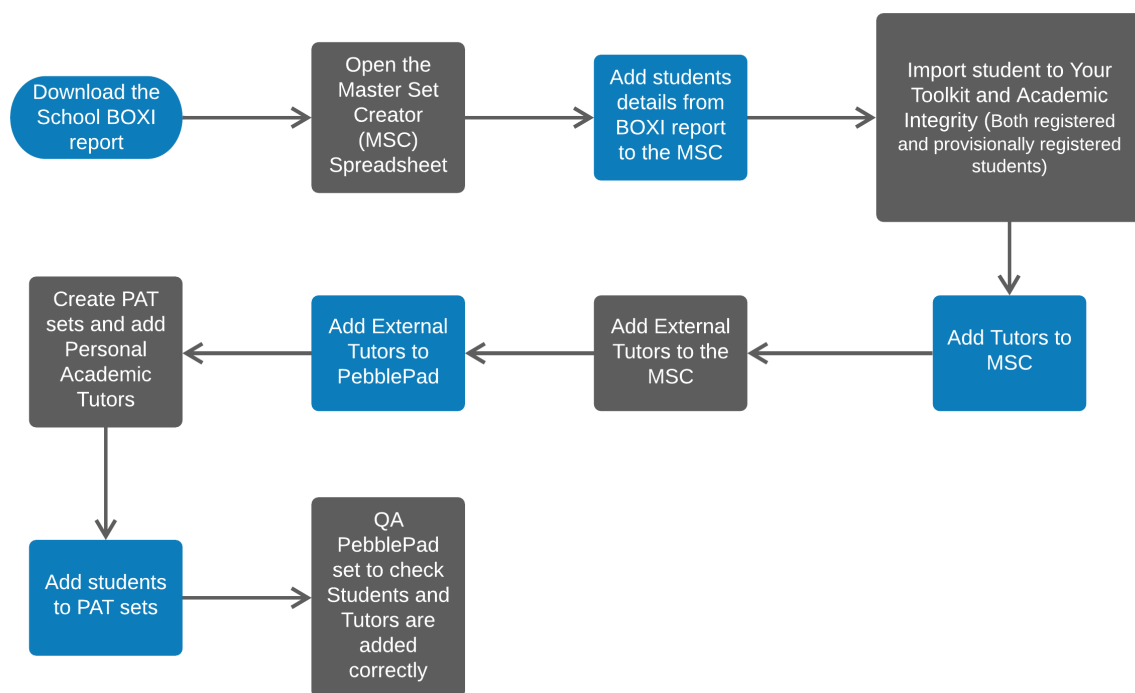
## Scope of this Working instruction

Completion of activity to be carried out by programme administration includes:

- Importing of Data into Canvas using CanvasAdmin
- Preparation of Data using the Master Set Creator Spreadsheet
- Importing Data into PebblePad and the creation of PAT Sets

This working instruction aims to set out the process for adding student to Canvas Toolkits/AI Courses and matching of Personal Tutors to students.

## Process Flowchart



## Preparation of the Data using the Master Set Creator Spreadsheet

The Master Set Creator (MSC) spreadsheet has been created to ensure the data for each of the different stages of import into Canvas (via CanvasAdmin) and PebblePad is clean and in the correct format.

Programme Administrators (PA) will need access to student cohort data downloaded from a BOXI report. This will need to be added to the MSC Spreadsheet.

### Adding Students to the MSC

- Save a copy of the MSC and rename it with the relevant school's name (e.g., Birmingham Business School Year 1).
- Edit the 'Set Name' field in the MSC using the list available in the dropdown menu, for year 2+ select the set name that contains the programme/School followed by years of study (e.g., BBS-yr2) [Figure 1]. For first years select the option with 'Intake' in the name (e.g., BBS-Intake) [Figure 2].
- Check the 'Academic session' is correct. It should read '21/22' for all years [1][2].


Figure 1: Screenshot of the MSC spreadsheet showing the 'Set Name' dropdown menu with 'BBS-yr2' selected. The 'Academic Session' is '21/22'.

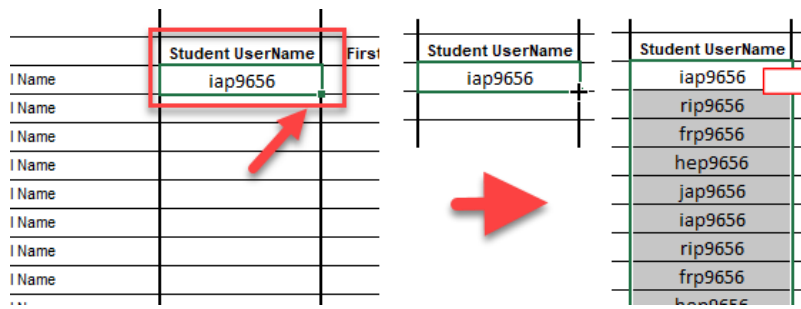
Figure 2: Screenshot of the MSC spreadsheet showing the 'Set Name' dropdown menu with 'BBS-Intake' selected. The 'Academic Session' is '21/22'.

- Populate the MSC spreadsheet using the BOXI report.

ID	First Name	Surname	University Email	Res	Start Date	Status	Prog Code	Prog Title
1670747	Ian	Price	<a href="mailto:iap966@bham.ac.uk">iap966@bham.ac.uk</a>	H	30/09/2021	NR	1707	Test College
1670748	Bill	Evans	<a href="mailto:ebi656@bham.ac.uk">ebi656@bham.ac.uk</a>	H	01/10/2021	NR	1708	Test College
1670749	Frank	Smith	<a href="mailto:sfn756@student.bham.ac.uk">sfn756@student.bham.ac.uk</a>	H	02/10/2021	NR	1709	Test College
1670750	John	Turner	<a href="mailto:tjy936@bham.ac.uk">tjy936@bham.ac.uk</a>	H	03/10/2021	NR	1710	Test College
1670751	Jeff	Johnson	<a href="mailto:jjo9366@bham.ac.uk">jjo9366@bham.ac.uk</a>	H	04/10/2021	NR	1711	Test College
1670752	David	Hoffs	<a href="mailto:dhd4936@bham.ac.uk">dhd4936@bham.ac.uk</a>	H	05/10/2021	NR	1712	Test College
1670753	Ginger	Baker	<a href="mailto:gbr996@bham.ac.uk">gbr996@bham.ac.uk</a>	H	06/10/2021	NR	1713	Test College
1670754	Richard	Manns	<a href="mailto:rmo9016@bham.ac.uk">rmo9016@bham.ac.uk</a>	H	07/10/2021	NR	1714	Test College

Only the first row of the 'Student Username' column will be automatically visible, to populate this column you will need to use the 'Fill down' function in Excel.

- Select the visible 'Student Username' cell.
- Drag the fill handle  down across the cells you wish to fill (A small cross will appear over the fill handle)



## Importing of Student Data Via CanvasAdmin

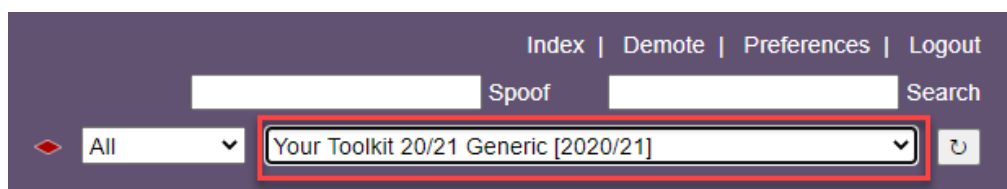
### Adding students to Toolkits and Academic Integrity courses using CanvasAdmin

**For students to be added to correct Workspaces in PebblePad they must first be added to the related Canvas Toolkit courses using CanvasAdmin.**

#### Adding Students to the Canvas Toolkit:

*NOTE: you need to be a teacher on the Canvas course to be able add students using CanvasAdmin.*

- Open Canvas Admin ( <https://tel.bham.ac.uk/canvasadmin/> ) and select the appropriate Toolkit/Academic Integrity course from the dropdown menu.



- In CanvasAdmin select Enrol Students from the Enrolment list.

## Home

CanvasAdmin comprises a range of administration functions for Canvas teach above allow you to select Canvas courses on which you are enrolled as a Teacher by a red diamond apply to the currently selected Canvas course.

Canvas Courses  
[Activate Canvas Course](#)  
[Roll Over Canvas Course](#)

User Accounts  
[User Lookup](#)

Enrolments  
[Enrol Students](#) ♦  
[Unenrol Students](#) ♦  
[Automatic Enrolments](#) ♦  
[List Enrolled students](#) ♦

- Select Enrol Students by Username

## Enrol as Students

Registered students and members of staff can be enrolled as students on Canvas courses to specify which students should be enrolled on the currently selected Canvas course.

- [Enrol Students by Department](#)
- [Enrol Students by Programme](#)
- [Enrol Students by Module](#)
- [Enrol Students by Username](#)
- [Enrol Students by ID number](#)
- [Enrol Departmental Staff as Students](#)

- Select the Student Usernames from the MSC spreadsheet (column J: Student Username) and copy and paste the list into the Usernames column in CanvasAdmin and submit.

## Enrol Students (by Username)

on **Academic Integrity 20/21 Generic [2020/21]**

Please complete the form below with details of the usernames of the individuals to be enrolled

<b>Usernames:</b>	<div>lap966 ebi656 sfn756 tic936</div>	Enter list of student usernames (xyz789)
<div>Submit Cancel</div>		

- On submission a confirmation page will load listing the students as a final check; select Enrol to confirm enrolment onto the selected course. Stay on the page until the page refreshes and returns to the 'Enrol as Students' page briefly displaying a confirmation message.

**NOTE:** Large volumes of enrolments take several minutes to process

**NOTE:** This process needs to be done ahead of Welcome Week. Students added to the Canvas course will automatically be added to the relevant workspace in PebblePad however this only refreshes every 24 hours and may not be visible in the Workspace until the following day.

Once the students have been added to both the 'Your Toolkit' and 'Academic Integrity', refer back to the MSC spreadsheet to continue the process of adding 'Tutors' and 'External Tutors'.

## Adding PAT Tutors to the MSC

- Add the tutors First name, Surname and Username into the correct column.

NOTE: If these details are incorrect this will cause problems when assigning students to their correct sets later in the process.

NOTE: It is important that you add the correct tutor in line with the student in the student data section on to the left.

- Once all PAT information has been populated select the populated cells 'Tutor Sets' (column N row 7) and 'Student Sets' (column O row 7) and fill down as before.

Personal Academic Tutor Details			Tutor Sets	Student Set
First Name	Surname	UserName		
John	Hancock	HancockJ	BBS-yr2-21/22-John-Hancock,hancockj	bbs-yr2-21/22-john-hancock,iap966
John	Hancock	HancockJ	BBS-yr2-21/22-John-Hancock,hancockj	bbs-yr2-21/22-john-hancock,ebi656
Keith	Jobs	JobsK	BBS-yr2-21/22-Keith-Jobs,jobsk	bbs-yr2-21/22-keith-jobs,sfn756
Keith	Jobs	JobsK	BBS-yr2-21/22-Keith-Jobs,jobsk	bbs-yr2-21/22-keith-jobs,tjy936

NOTE: Please do not edit any of the spreadsheet formulars.

## Adding external Tutors to the MSC

External tutors must be added to the PebblePad workspace before they can be used to create Sets.

The MSC will create import data in the correct format for bulk import into PebblePad.

- Open the MSC Tab 'External Tutors Import Data' (Second tab).
- Add the First name, Surname, Email addresses of the external Tutors.
- In the 'External Import Data' column fill down to create the information to import into PebblePad later

First name	Surname	Email	External Import Data
Aneurin	Bevan	<a href="mailto:A.Bevan@royalhospital.nhs.uk">A.Bevan@royalhospital.nhs.uk</a>	Aneurin,Bevan,A.Bevan@royalhospital.nhs.uk

- Copy First name, Surname and Email of each external into the 'Personal Academic Tutor Details' column on the 'Data Cleaning and Set Creator' Tab (First Tab) and paste in the row with the external's Tutees.

NOTE: External tutor username is their external email address, Internal tutors is their adf username

Personal Academic Tutor Details		
First Name	Surname	UserName
John	Hancock	HancockJ
John	Hancock	HancockJ
Keith	Jobs	JobsK
Keith	Jobs	JobsK
John	Hancock	HancockJ
John	Hancock	HancockJ
Aneurin	Bevan	<a href="mailto:A.Bevan@royalhospital.nhs.uk">A.Bevan@royalhospital.nhs.uk</a>
William	Bruford	<a href="mailto:bill.bruford@earthworks.co.uk">bill.bruford@earthworks.co.uk</a>

NOTE: If adding external Personal Tutors, they must be added to PebblePad before Set data containing their name is imported. Otherwise, they will not be automatically added to their Sets. This is covered in the PebblePad instructions.

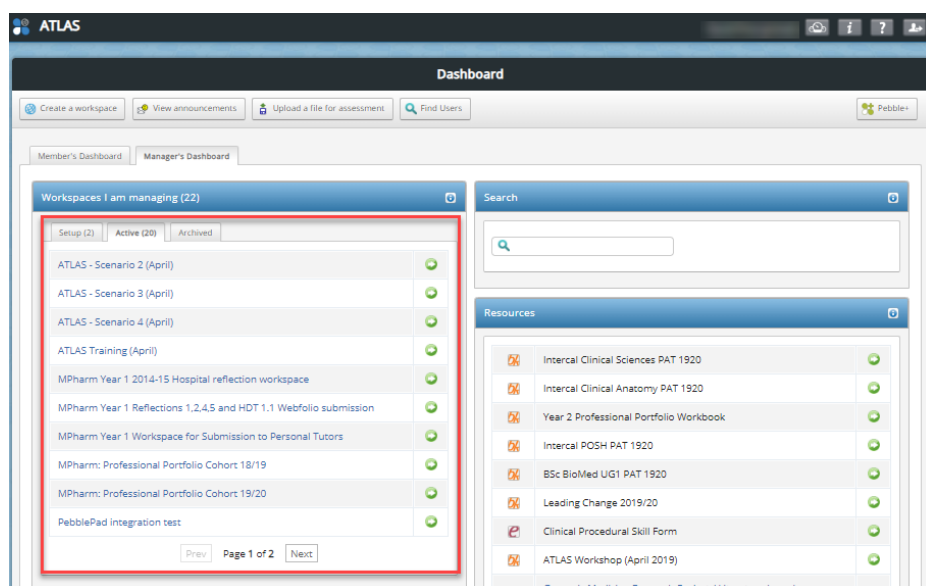
NOTE: You can view an example of what the MSC data should look like in the 'Example of clean data' (Third Tab).



## Importing of Data into PebblePad and the creation of PAT Sets

- Login into PebblePad here <https://atlas.pebblepad.co.uk/atlas/bham>. You will only view/access workspaces you have been assigned to in the 'Workspaces I am managing' panel.
- Select the workspace you wish to update.

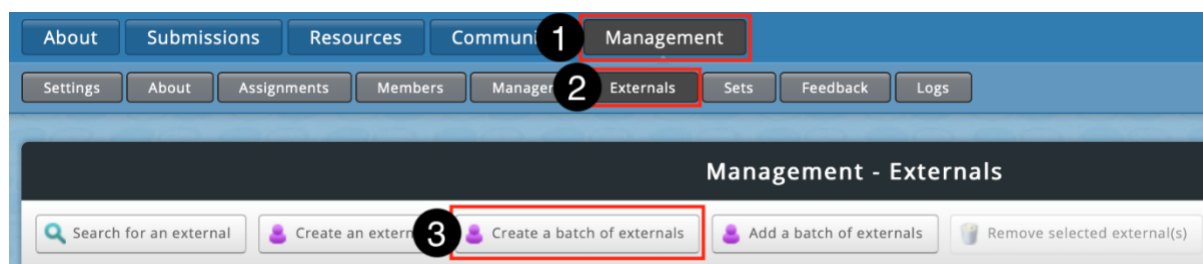
NOTE: If you cannot find the workspace you require or see workspaces you believe you should not have access to please contact your local HEFi Digital Team.



NOTE: Adding external users to PebblePad (Must be done first)

If you have external Personal Tutors (those without a bham.ac.uk email address) you need to add them to the workspace before you create their PAT Sets. Not doing this will create errors in the set creation process.

- Select the 'Management' button [1] from the navigation bar.
- This will then open a sub menu where you can select the 'Externals' button [2].
- Then select the 'Create a Batch of externals' button [3].



- Select the Tab 'External Tutors Import Data' from within the MSC and copy the 'External Import Data' column.

First name	Surname	Email	External Import Data
Aneurin	Bevan	<a href="mailto:A.Bevan@royalhospital.nhs.uk">A.Bevan@royalhospital.nhs.uk</a>	Aneurin,Bevan,A.Bevan@royalhospital.nhs.uk
James	Moore	<a href="mailto:J.Moore@nhs.ac.uk">J.Moore@nhs.ac.uk</a>	James,Moore,J.Moore@nhs.ac.uk

- Past the 'External Import Data' data into the 'Create a batch of Externals' page in PebblePad.

Management - Create a batch of Externals

Back

One line per account, comma (or tab) separated in the format: forename, surname, email

aneurin,bevan,a.bevan@royalhospital.nhs.uk

william bruford,bill,bruford@earthworks.co.uk

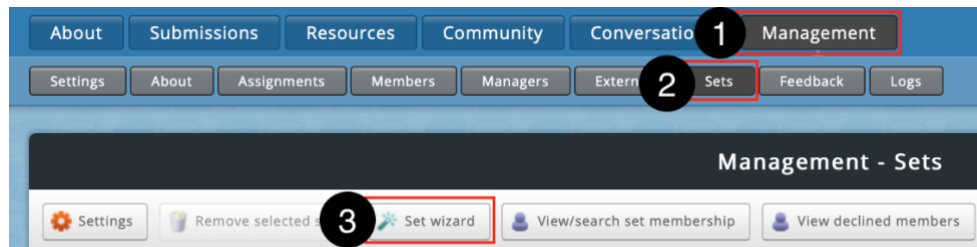
Continue

Cancel

*NOTE: External Tutors email addresses will be used as their username in PebblePad.*

## Creating PAT Sets and adding Personal Tutors

- Select the appropriate workspace from the 'Workspaces I am managing' area.
- Once the page has loaded select 'Management' [1] followed by 'Sets' [2].
- Select the 'Set Wizard' [3] button and a screen offering several options will load.



- Select the last option: 'Import a list of users into new or existing sets using a CSV format'.

What would you like to do?

- ☐ Create a single set  
*Create a single set and add members manually*
- ☐ Create multiple sets and distribute members  
*Quickly and easily create sets for tutors, moderators and evenly distribute*
- ☐ Distribute unallocated members into existing sets  
*Unallocated members will be distributed evenly into existing sets*
- ☐ Import a list of users into a single set  
*A list of usernames are required*
- ☒ Import a list of users into new or existing sets using a CSV format  
*The CSV requires a set title and a username*

- On the following page copy and paste the Tutor Sets column from the MSC spreadsheet into the form and select Continue.

Enter a set title followed by a comma (or tab) then by a username:

School\_Name-1-2021-John-Hancock,hancockj

School\_Name-1-2021-Bill-Hancock,hancockb

School\_Name-1-2021-Fred-Hancock,hancockfk

School\_Name-1-2021-Mark-Hancock,hancockm

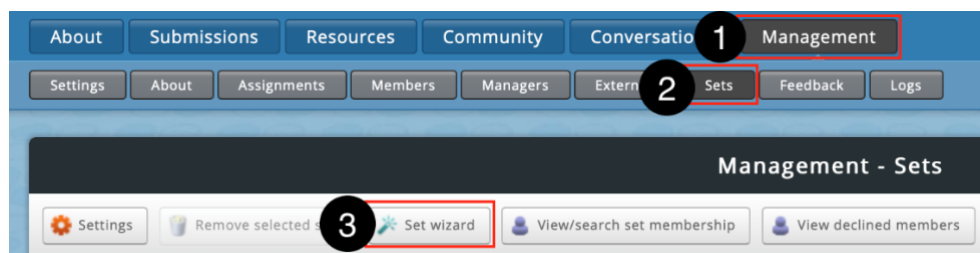
School\_Name-1-2021-Dave-Hancock,hancockd

- Once this has been completed open the 'Sets' tab within the workspace, this should contain a list of 'Sets' that have imported with the relevant personal tutor in each one each one.

<input type="checkbox"/>	Title
<input type="checkbox"/>	School of Govt and Society-Political Sci & Intern'tl Stud-1-UG-1920-
<input type="checkbox"/>	School of Govt and Society-Political Sci & Intern'tl Stud-1-UG-1920-
<input type="checkbox"/>	School of Govt and Society-Political Sci & Intern'tl Stud-1-UG-1920-
<input type="checkbox"/>	School of Govt and Society-Political Sci & Intern'tl Stud-1-UG-1920-

## Adding Students to PAT Sets

- Select the appropriate workspace from the 'Workspaces I am managing' area.
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*Unallocated members will be distributed evenly into existing sets*
- ☐ Import a list of users into a single set  
*A list of usernames are required*
- ☒ Import a list of users into new or existing sets using a CSV format  
*The CSV requires a set title and a username*

Continue

- On the following page copy and paste the Student Set column from the MSC spreadsheet into the form and select Continue.

Enter a set title followed by a comma (or tab) then by a username:

school\_name-1-2021-john-hancock,iap966

school\_name-1-2021-john-hancock,ebi656

school\_name-1-2021-keith-jobs,sfn756

school\_name-1-2021-keith-jobs,tjo936

Continue

- Once completed Sets should include Tutors and Students. To confirm Sets have been created successfully select the 'Sets' tab within the workspace and select a set out of the list to open.
- Once the set is open it will display to sections 'Unassigned students' [1] and the set information [2].
- The Personal Academic Tutor will display in green (Lead Tutor) and student will display in blue (Member).

1

+ Add selected users

Type	Name
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock

2

Remove members

Type	Name
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock
<input type="checkbox"/>	John Hancock