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].

- Populate the MSC spreadsheet using the BOXI report.

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Surname</th>
<th>University Email</th>
<th>Sex</th>
<th>Start Date</th>
<th>Status</th>
<th>prog Code</th>
<th>Prog Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1676747</td>
<td>Ian</td>
<td>Price</td>
<td><a href="mailto:iapr565@bham.ac.uk">iapr565@bham.ac.uk</a></td>
<td>M</td>
<td>09/01/2021</td>
<td>NR</td>
<td>1707</td>
<td>Test College</td>
</tr>
<tr>
<td>1676748</td>
<td>Bill</td>
<td>Evans</td>
<td><a href="mailto:ebe556@bham.ac.uk">ebe556@bham.ac.uk</a></td>
<td>M</td>
<td>01/01/2021</td>
<td>NR</td>
<td>1708</td>
<td>Test College</td>
</tr>
<tr>
<td>1676749</td>
<td>Frank</td>
<td>Smith</td>
<td><a href="mailto:sfs756@student.bham.ac.uk">sfs756@student.bham.ac.uk</a></td>
<td>M</td>
<td>22/10/2021</td>
<td>NR</td>
<td>1709</td>
<td>Test College</td>
</tr>
<tr>
<td>1676750</td>
<td>John</td>
<td>Turner</td>
<td><a href="mailto:jtu934@bham.ac.uk">jtu934@bham.ac.uk</a></td>
<td>M</td>
<td>03/10/2021</td>
<td>NR</td>
<td>1710</td>
<td>Test College</td>
</tr>
<tr>
<td>1676751</td>
<td>Jeff</td>
<td>Johnson</td>
<td><a href="mailto:jjo936@bham.ac.uk">jjo936@bham.ac.uk</a></td>
<td>M</td>
<td>04/01/2021</td>
<td>NR</td>
<td>1711</td>
<td>Test College</td>
</tr>
<tr>
<td>1676752</td>
<td>David</td>
<td>Hoffs</td>
<td><a href="mailto:dhd493@bham.ac.uk">dhd493@bham.ac.uk</a></td>
<td>M</td>
<td>06/10/2021</td>
<td>NR</td>
<td>1712</td>
<td>Test College</td>
</tr>
<tr>
<td>1676753</td>
<td>Ginger</td>
<td>Baker</td>
<td><a href="mailto:gba996@bham.ac.uk">gba996@bham.ac.uk</a></td>
<td>M</td>
<td>06/10/2021</td>
<td>NR</td>
<td>1713</td>
<td>Test College</td>
</tr>
<tr>
<td>1676754</td>
<td>Richard</td>
<td>Morris</td>
<td><a href="mailto:rmo9016@bham.ac.uk">rmo9016@bham.ac.uk</a></td>
<td>M</td>
<td>07/10/2021</td>
<td>NR</td>
<td>1714</td>
<td>Test College</td>
</tr>
</tbody>
</table>

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.
  - Select Enrol Students by Username
    - 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.
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 refreshed 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.

**NOTE:** Please do not edit any of the spreadsheet formulas.

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

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

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

• Past the ‘External Import Data’ data into the ‘Create a batch of Externals’ page in PebblePad.

**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’.

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

Adding Students to PAT Sets
• 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’. 
• On the following page copy and paste the Student Set column from the MSC spreadsheet into the form and select 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).