Carnegie Mellon University
Enrollment Services

Upload Advisor Assignments Guide

Upload Advisor Assignments Guide

The **S3 Upload Advisor Assignments** page allows users to add, change, or remove advisors in batches rather than one by one, streamlining the advisor update process.

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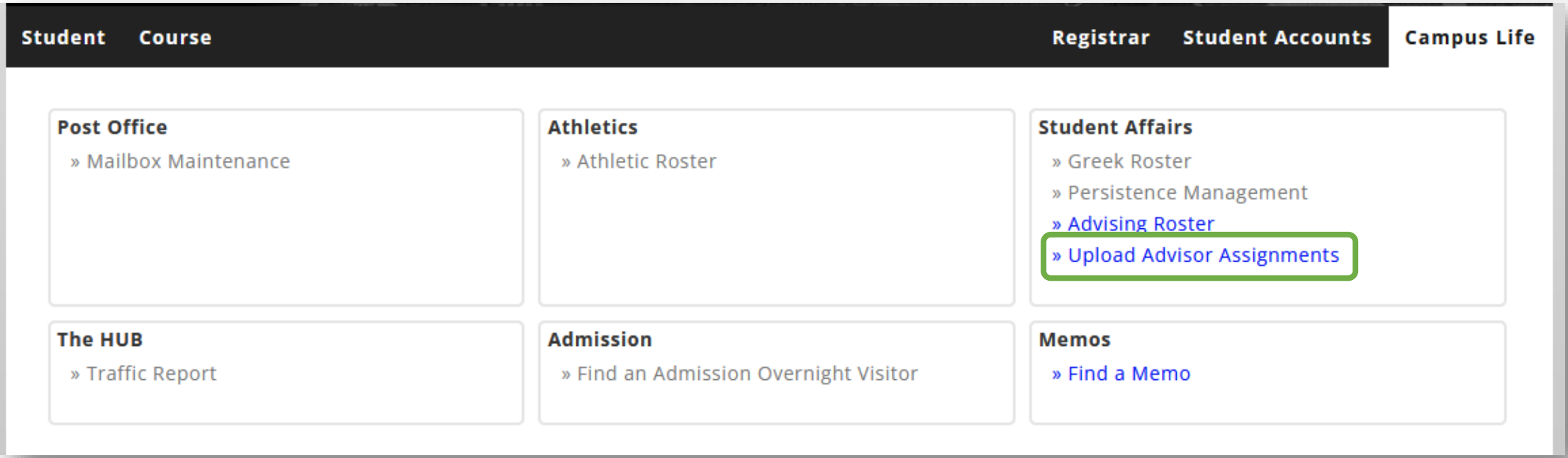
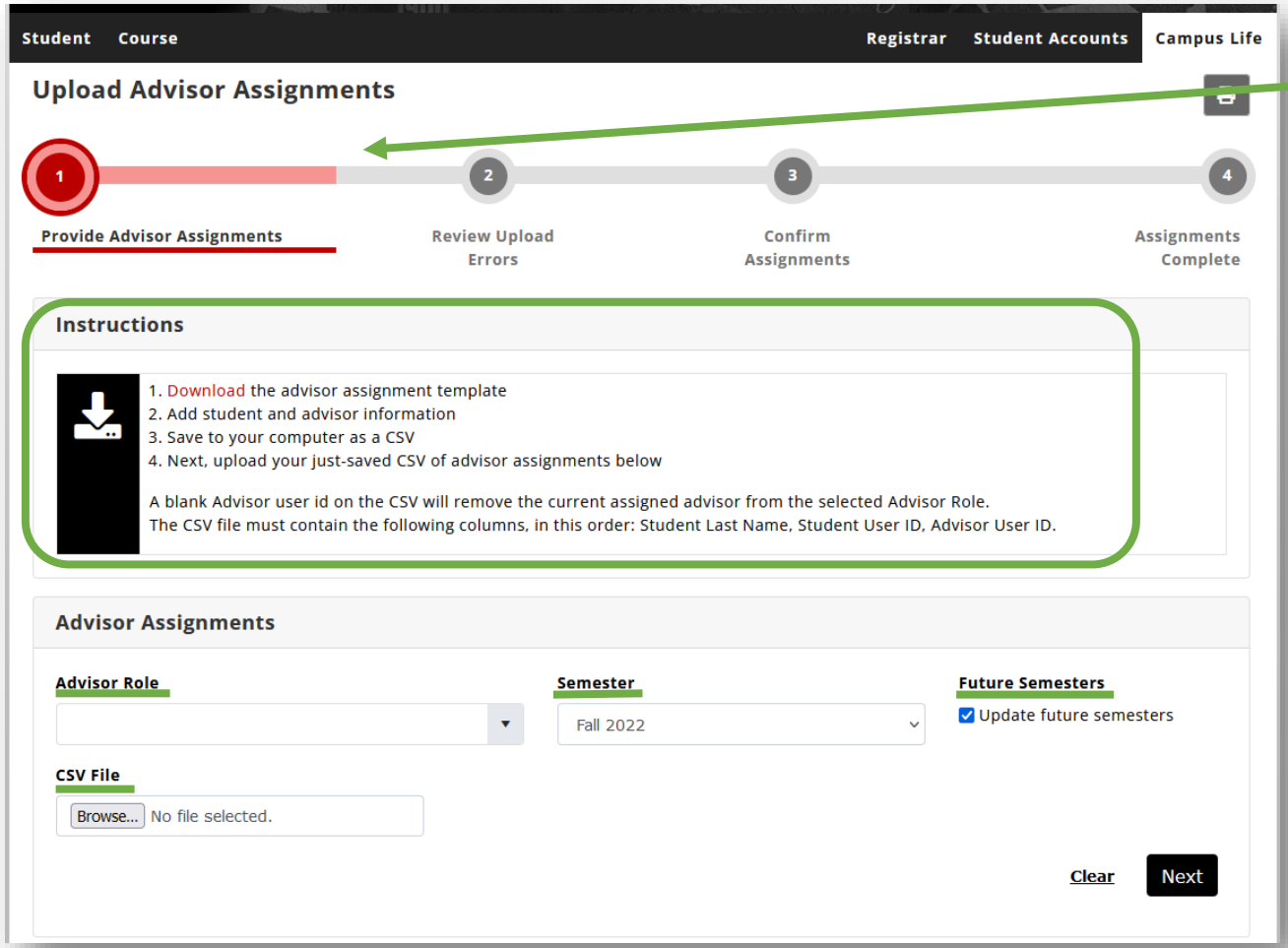
Finding the Upload Advisor Assignments Page

To navigate to the Upload Advisor Assignments page, log in to S3 and under the **Campus Life** tab, click the blue **Upload Advisor Assignments** link under the **Student Affairs** header.

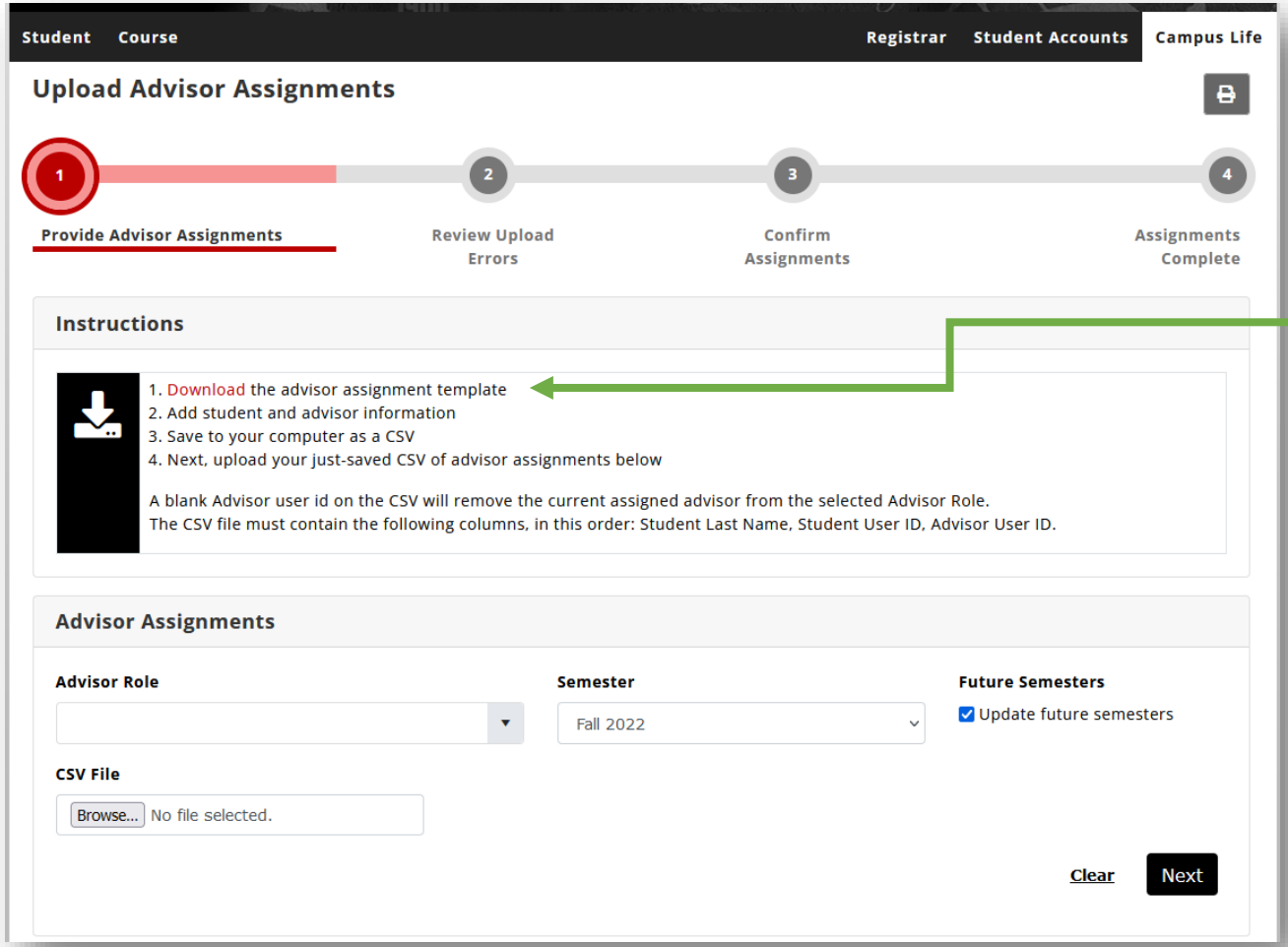


Page Overview



- The status bar helps you chart your progress.
- Simple instructions walk you through the advisor upload process.
- The **Advisor Role** drop-down allows you to choose the type of advisor you wish to update. Please note that you can only update one type of advisor at a time.
- The **Semester** menu allows you to choose when the advisor assignments should start.
- The **Future Semesters** checkbox allows you to indicate whether S3 should update advisor assignments for future semesters. If the box is checked, the assignments will apply to all existing future semesters. If it is not checked, the assignments will only apply to the semester selected in the Semester menu.
- The **Browse…** or **Choose File** button under the **CSV File** header allows you to upload a pre-populated CSV containing student and advisor information.

Step 1: Provide Advisor Assignments



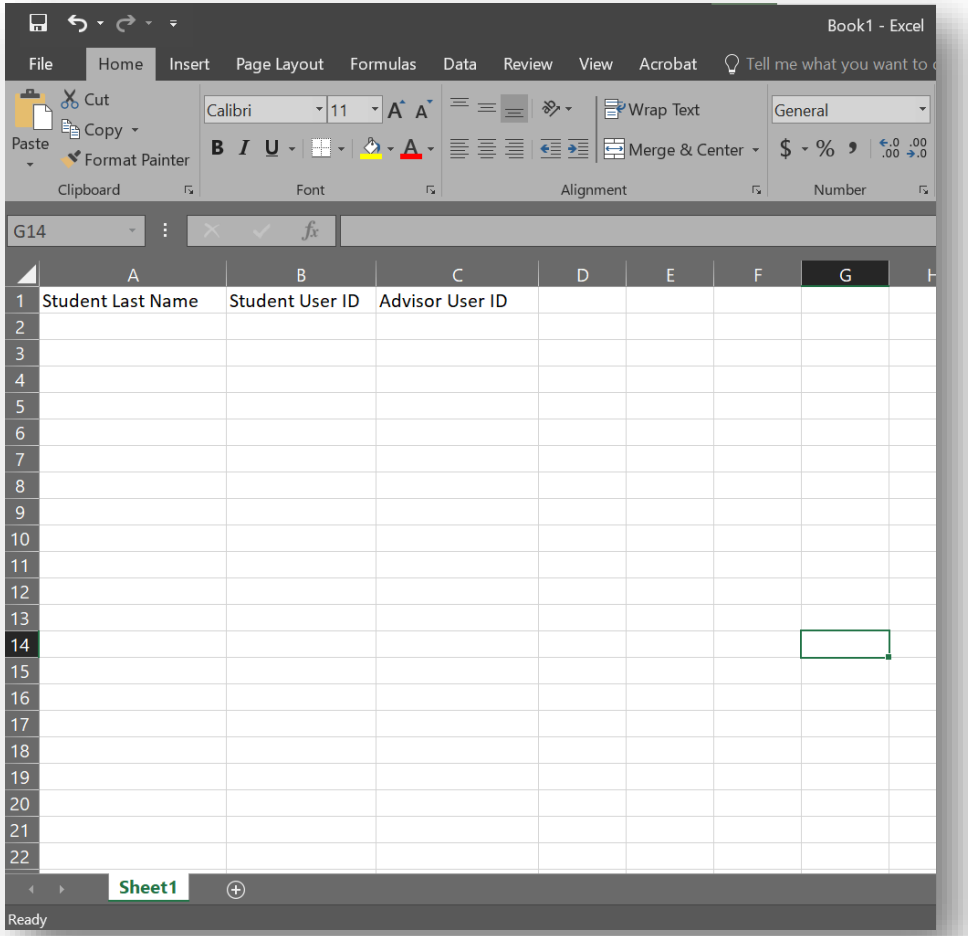
You'll start on **Step 1: Provide Advisor Assignments**.

To begin uploading advisor assignments, click the red **Download** link in the Instructions box.

A CSV file with columns titled *Student Last Name*, *Student User ID*, and *Advisor User ID* will download onto your device.

Type or copy-paste the appropriate information into each column in the CSV file.

Step 1: Provide Advisor Assignments (cont.)



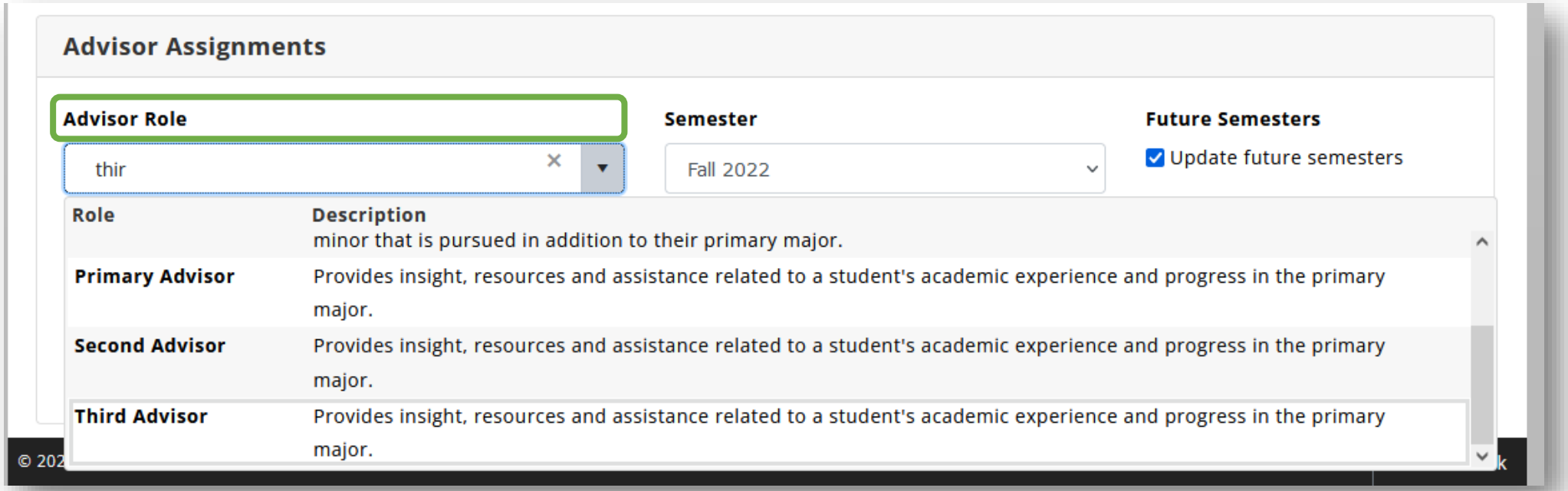
Tips for filling in your CSV template:

- The column headers must remain in this order: *Student Last Name, Student User ID, Advisor User ID*.
- All the advisors entered into any given file must fulfill the same role. For example, all Primary Advisor updates must go in one file and all Minor Advisor updates must go in a different one. You cannot mix advisor roles in the same file.
- To remove a student's advisor assignment, leave the relevant cell in the Advisor User ID column blank.
- **Remember to save your file as a CSV**.

Step 1: Provide Advisor Assignments (cont.)

Now that you've saved your CSV file, you're almost ready to upload. First, select the appropriate **Advisor Role** from the drop-down menu. Remember that you can only update one type of advisor at a time.

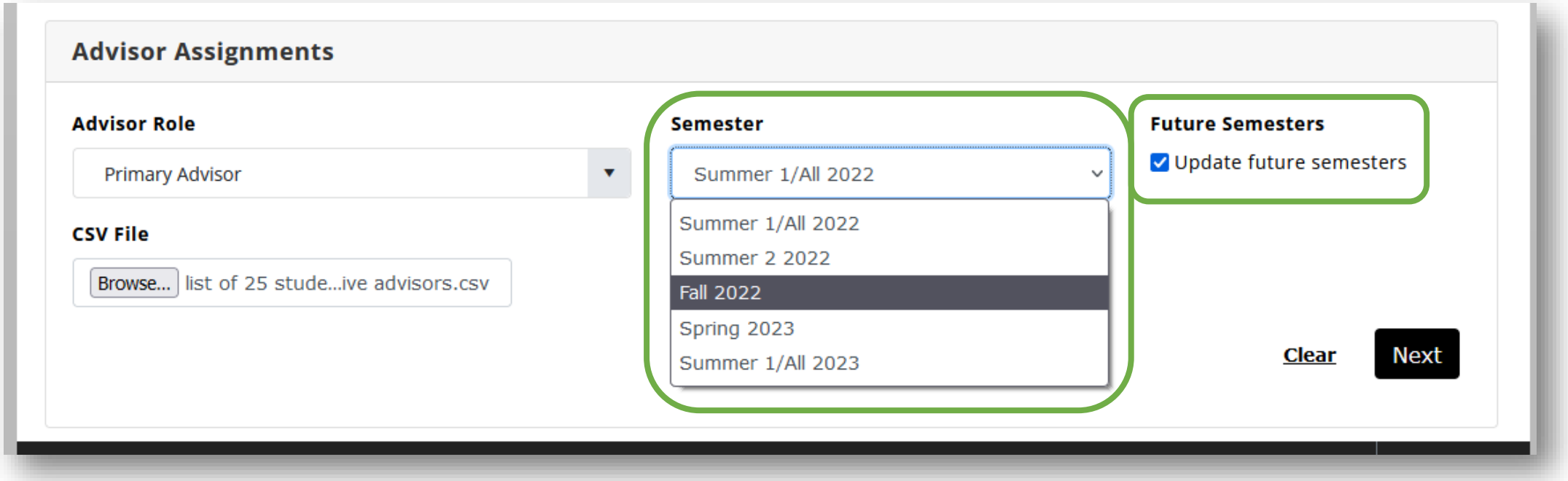
To find the correct role, scroll through the menu options or search by typing the advisor role into the menu field. When the correct role is highlighted, press enter to populate the field.



Step 1: Provide Advisor Assignments (cont.)

Next, select the **semester** when the advisor update should start.

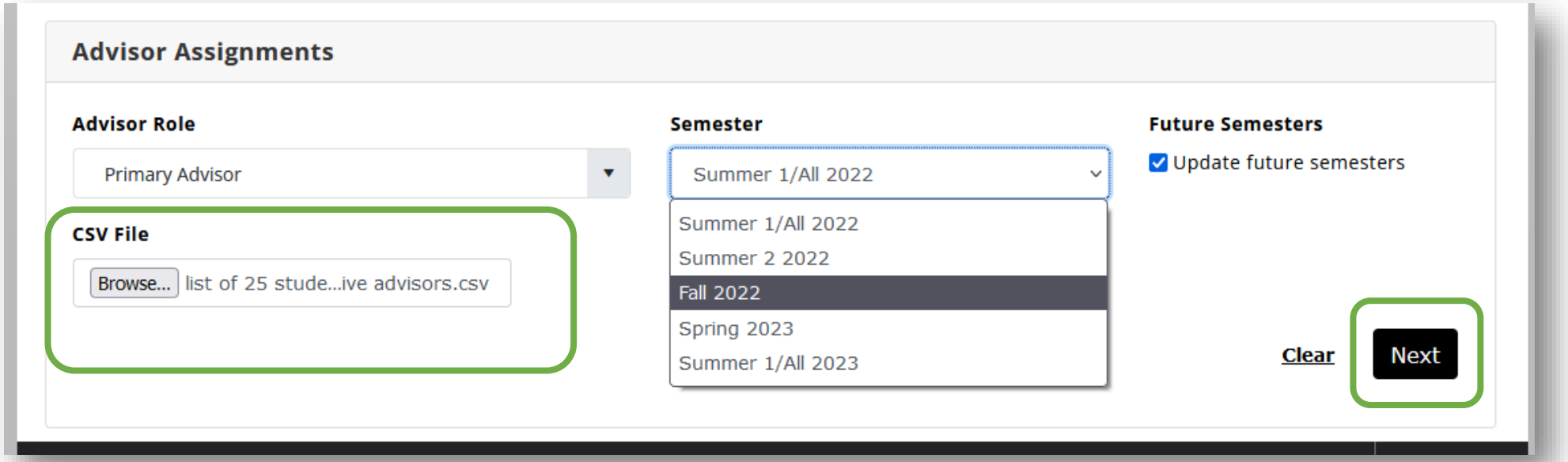
If you wish to apply these updates to future semesters, leave the **Future Semesters** box checked. If these assignments are for one semester only, uncheck the box.



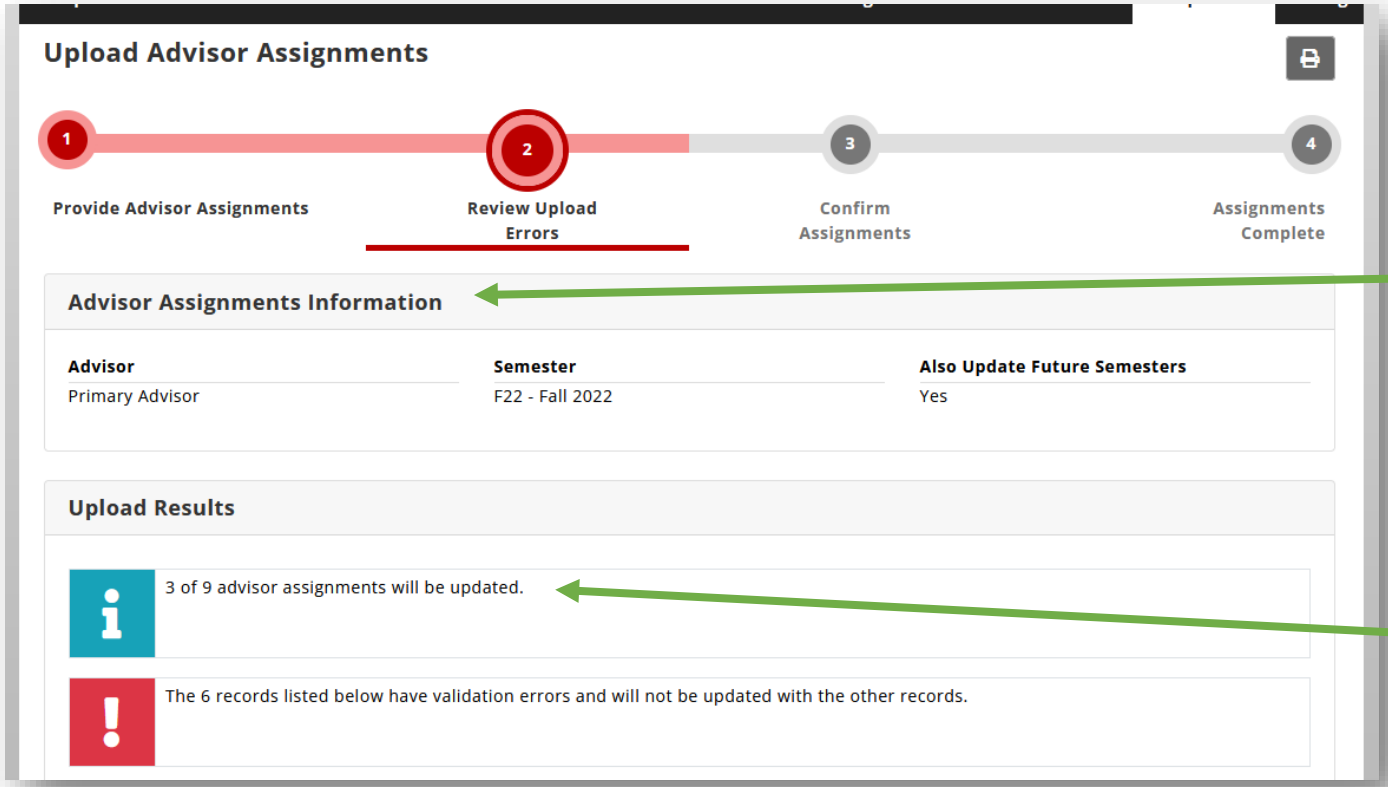
Step 1: Provide Advisor Assignments (cont.)

Under the CSV File header, click **Browse...** or **Choose File** (depending on your browser) to select and upload your CSV file.

Once the file is uploaded, click **Next**. Longer CSV files may take a few minutes to upload.



Step 2: Review Upload Errors

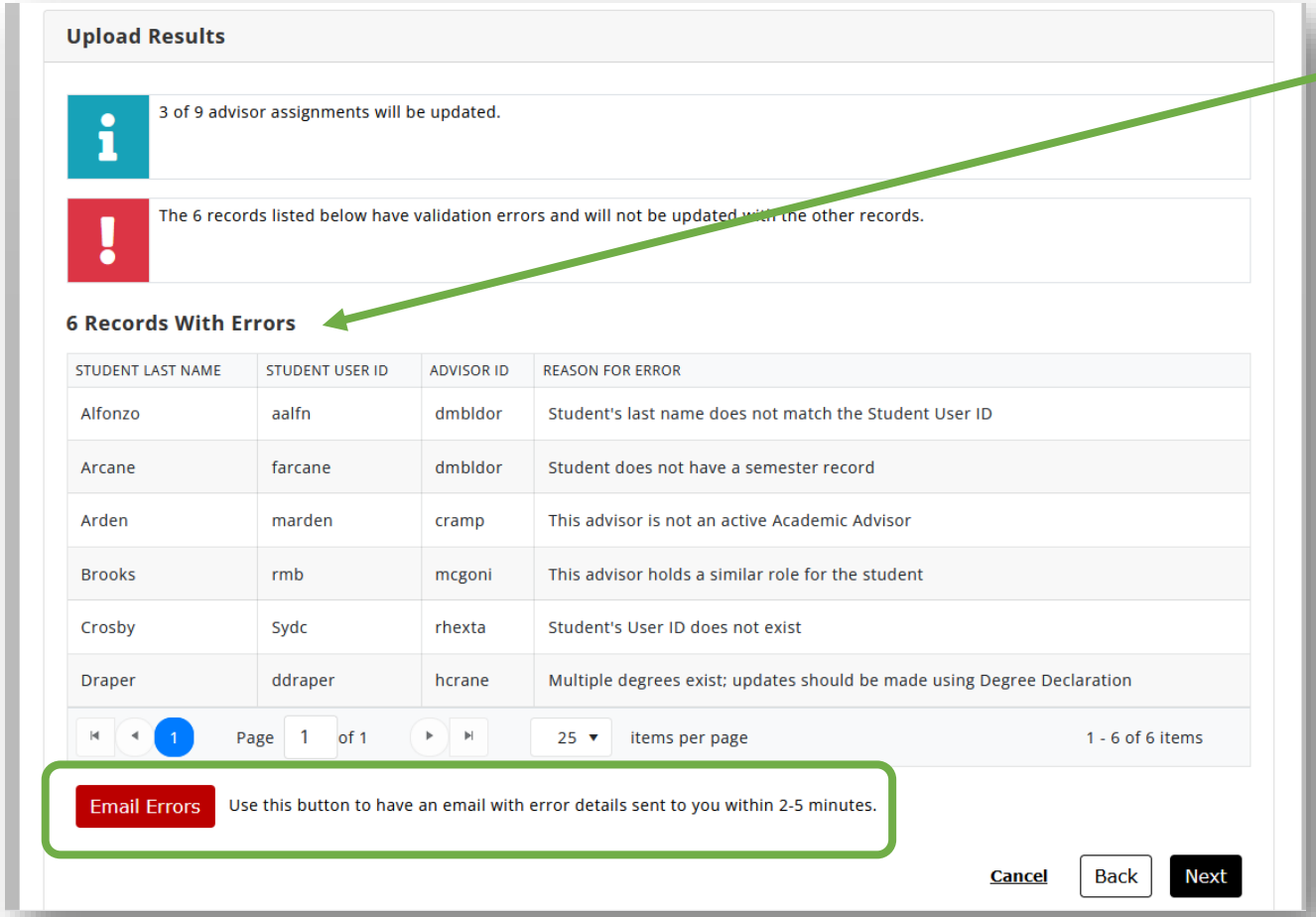


You'll be taken to **Step 2: Review Upload Errors** to review upload results before moving on to the next step.

Under the **Advisor Assignments Information** header, be sure that you've entered the correct advisor type, start semester, and that you've either checked or unchecked the Update Future Semesters box (depending on your preference).

Under the **Upload Results** header, you'll see the total number of advisor assignments that will be updated.

Step 2: Review Upload Errors (cont.)



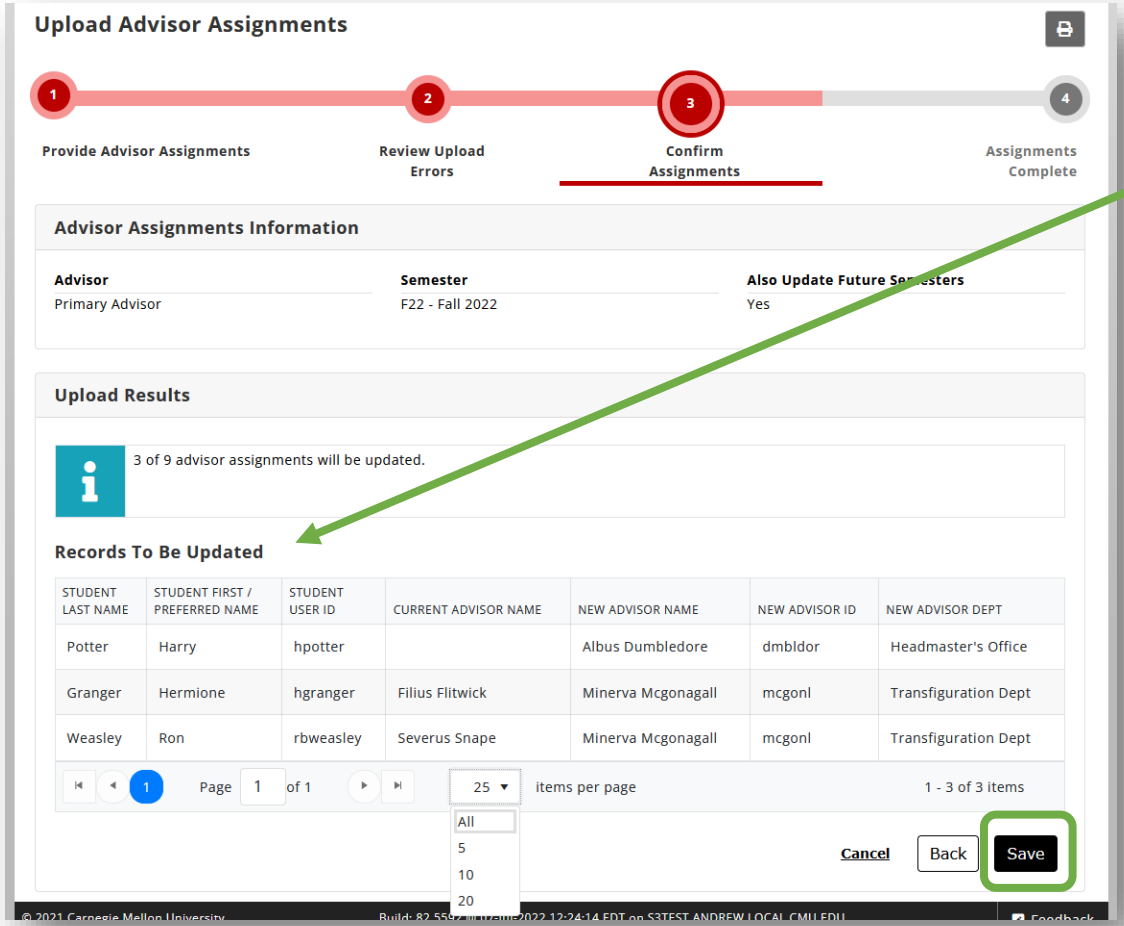
If any of the CSV rows encounter errors, you will see a list of the entries that need to be corrected and the reasons why they have been identified as errors.

You can click the **Back** button and re-upload the CSV once you've made corrections to your original file.

Alternately, if you prefer to continue with the other assignments and correct the errors later, click the **Email Errors** button to have a list of error details sent to your Andrew account. You are not required to correct the errors before moving on to the next step.

Once you are ready to continue with the process, click Next.

Step 3: Confirm Assignments

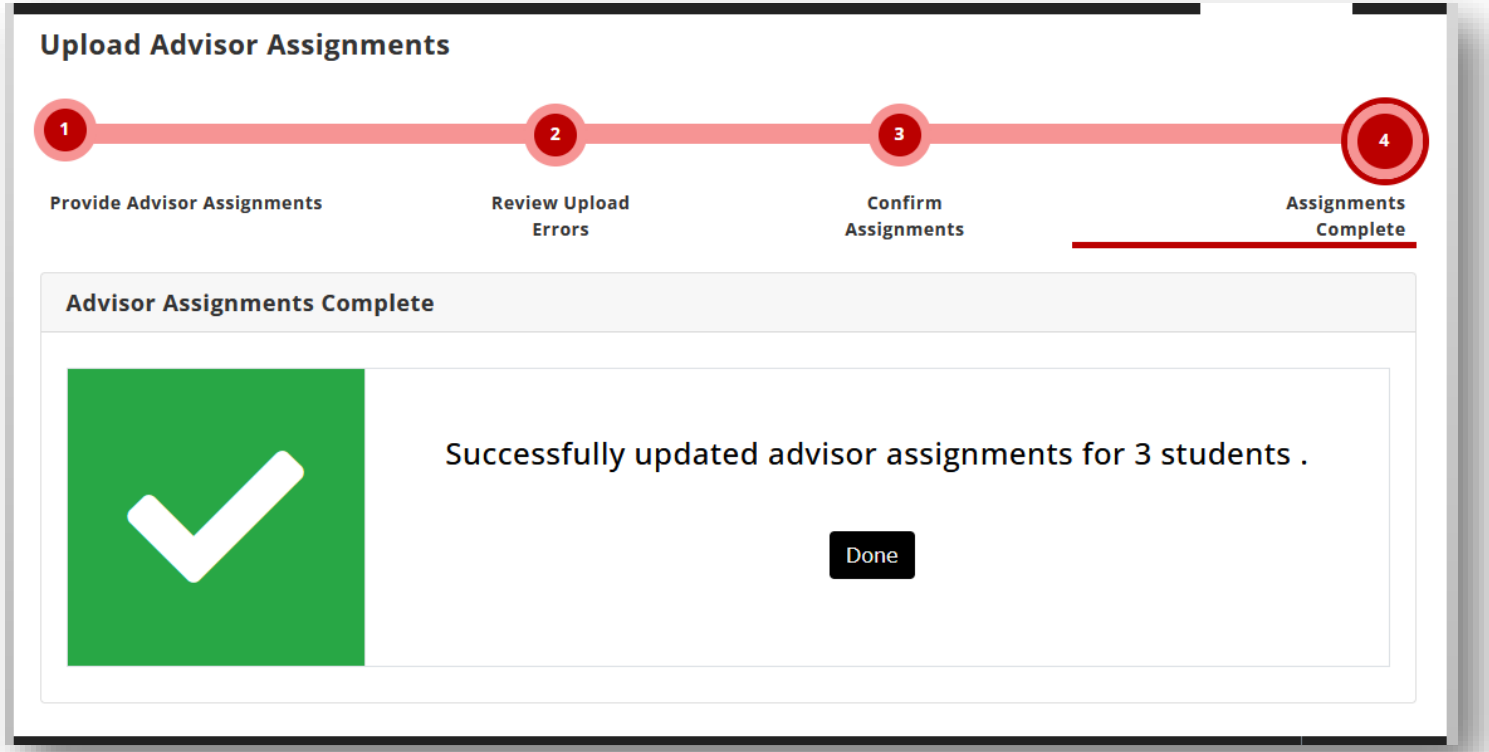


You'll be taken to **Step 3: Confirm Assignments** page. Take a moment to double-check the new advisor information for each student.

If your list looks correct, click **Save** to begin the assignment process. Longer lists may take a few minutes to complete.

Please note: Once you click the Save button, the assignment process will begin. There is no undo button, so if you realize you have made an error after saving, you will need to repeat the upload process from Step 1 with a fresh CSV in order to make corrections.

Step 4: Assignments Complete



Once your assignments have successfully saved, you will be directed to **Step 4: Assignments Complete**, where the number of successful assignments will be confirmed.

The green checkmark means you've done it! Congratulations!

Thank you for your support of the Student Services Suite (S3). For additional questions or comments, please email egrades@andrew.cmu.edu.

Be sure to stay tuned to the S3 Updates webpage for release summaries, user documentation, training sessions, and more.

Follow **@CarnegieMellonS3** on Facebook and Instagram, or @S3CMU on Twitter, for news and updates!