



Upload Advisor Assignments Guide



Upload Advisor Assignments Guide



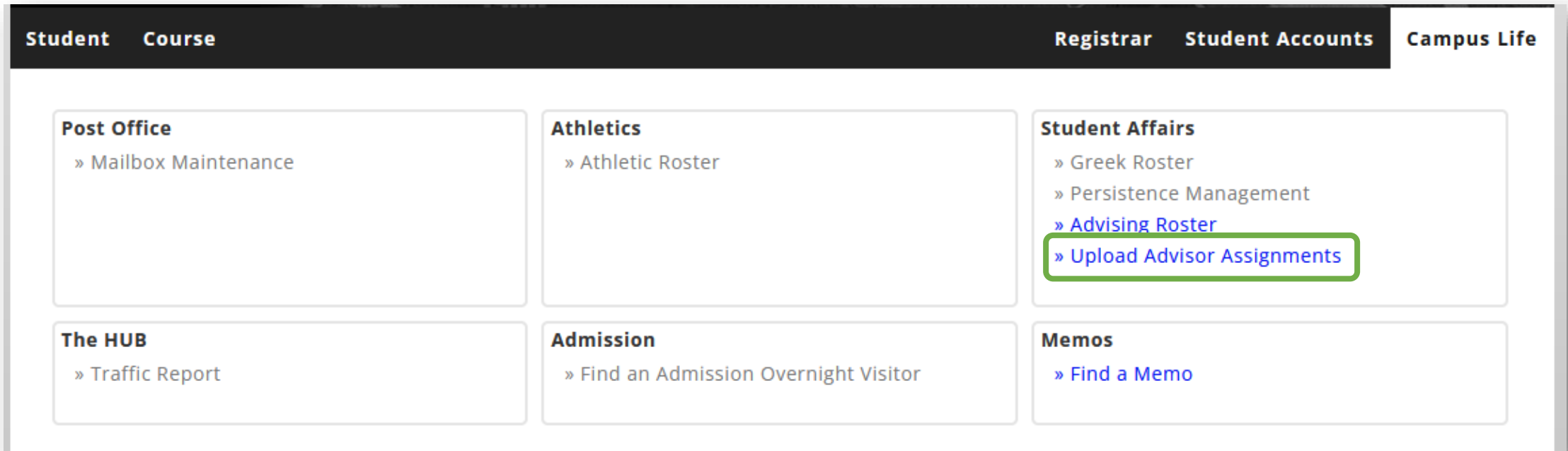
The **S3 Upload Advisor Assignments** page allows users to add, change, or remove advisors in batches rather than one by one, streamlining the advisor update process.

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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

Student Course Registrar Student Accounts Campus Life

Upload Advisor Assignments

1 Provide Advisor Assignments 2 Review Upload Errors 3 Confirm Assignments 4 Assignments Complete

Instructions

1. Download the advisor assignment template
2. Add student and advisor information
3. Save to your computer as a CSV
4. Next, upload your just-saved CSV of advisor assignments below

A blank Advisor user id on the CSV will remove the current assigned advisor from the selected Advisor Role.
The CSV file must contain the following columns, in this order: Student Last Name, Student User ID, Advisor User ID.

Advisor Assignments

Advisor Role Semester Future Semesters

Fall 2022 Update future semesters

CSV File

Browse... No file selected.

Clear Next

- 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

Student Course Registrar Student Accounts Campus Life

Upload Advisor Assignments

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Advisor Assignments

Advisor Role Semester Future Semesters Update future semesters

CSV File

[Clear](#)

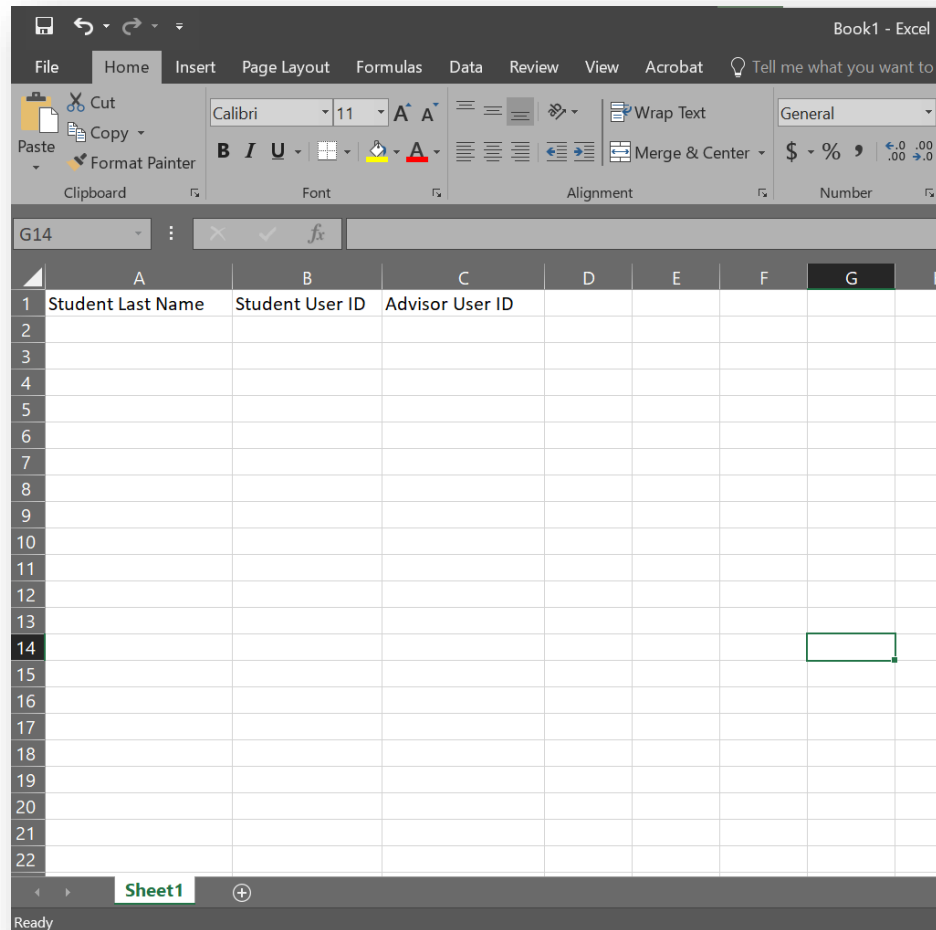
You'll start on **Step 1: Provide Advisor Assignments.**

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.)



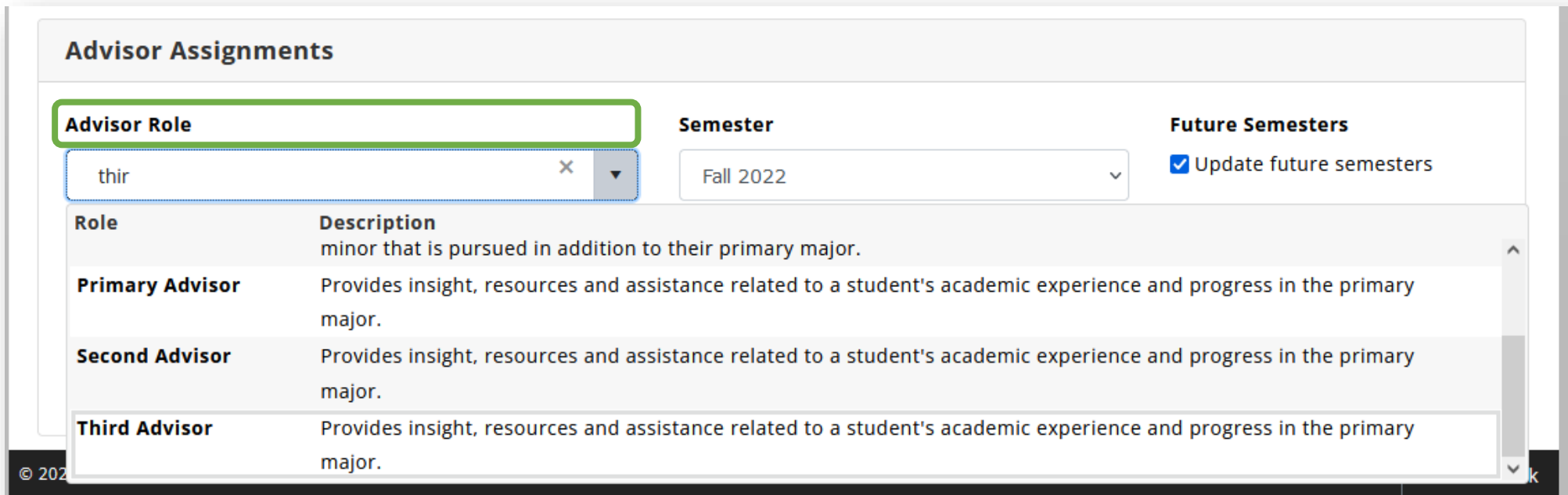
Tips for filling in your CSV template:

- 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.



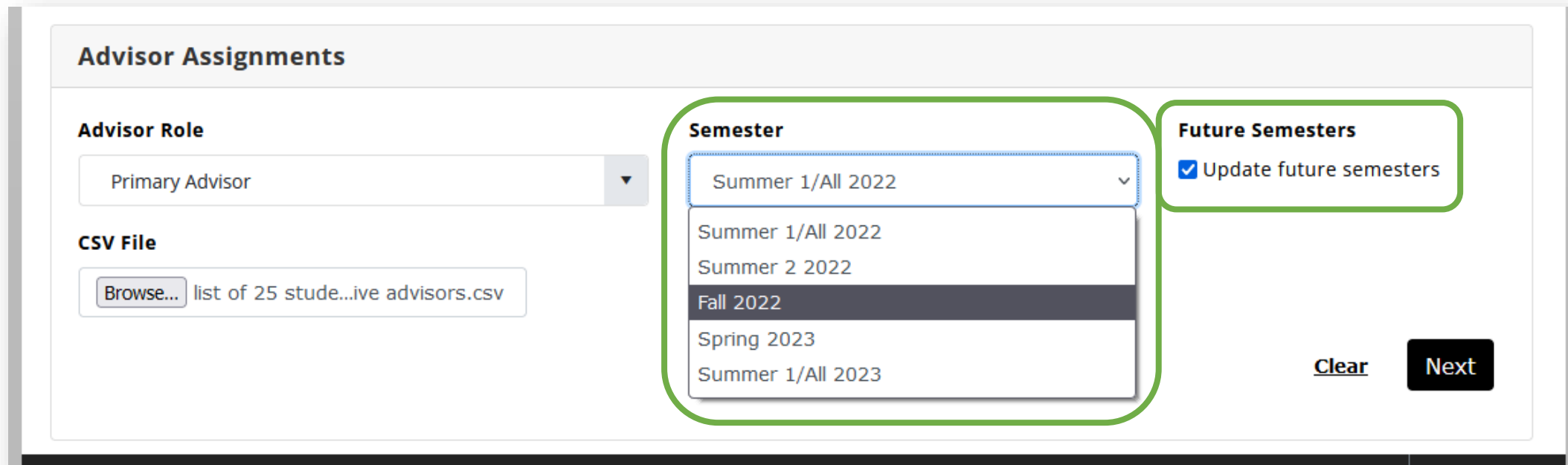
The screenshot shows the 'Advisor Assignments' form. The 'Advisor Role' dropdown menu is open, displaying a search for 'thir'. The search results list three roles: 'Third Advisor', 'Primary Advisor', and 'Second Advisor'. The 'Third Advisor' role is currently selected and highlighted. The 'Semester' dropdown is set to 'Fall 2022', and the 'Future Semesters' checkbox is checked.

Role	Description
Third Advisor	Provides insight, resources and assistance related to a student's academic experience and progress in the primary major.
Primary Advisor	Provides insight, resources and assistance related to a student's academic experience and progress in the primary major.
Second Advisor	Provides insight, resources and assistance related to a student's academic experience and progress in the primary major.

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.



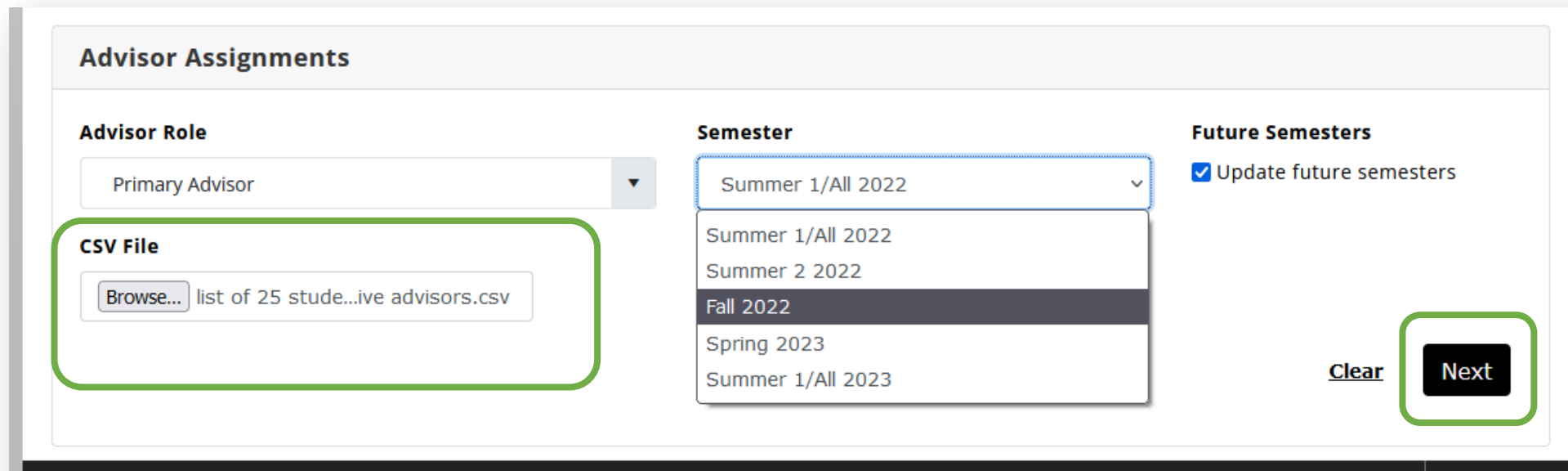
The screenshot shows the 'Advisor Assignments' form with the following elements:

- Advisor Role:** A dropdown menu set to 'Primary Advisor'.
- CSV File:** A 'Browse...' button next to the filename 'list of 25 stude...ive advisors.csv'.
- Semester:** A dropdown menu with the following options: 'Summer 1/All 2022', 'Summer 1/All 2022', 'Summer 2 2022', 'Fall 2022' (highlighted), 'Spring 2023', and 'Summer 1/All 2023'.
- Future Semesters:** A checkbox labeled 'Update future semesters' which is checked.
- Buttons:** 'Clear' and 'Next' buttons.

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.



The screenshot shows a web form titled "Advisor Assignments". It contains several fields and controls:

- Advisor Role:** A dropdown menu currently set to "Primary Advisor".
- CSV File:** A section with a "Browse..." button and the text "list of 25 stude...ive advisors.csv". This section is highlighted with a green rounded rectangle.
- Semester:** A dropdown menu with "Summer 1/All 2022" selected. The dropdown list is open, showing options: "Summer 1/All 2022", "Summer 2 2022", "Fall 2022" (highlighted), "Spring 2023", and "Summer 1/All 2023".
- Future Semesters:** A checkbox labeled "Update future semesters" which is checked.
- Navigation:** A "Clear" link and a "Next" button. The "Next" button is highlighted with a green rounded rectangle.

Step 2: Review Upload Errors

The screenshot shows a four-step process for uploading advisor assignments. Step 2, 'Review Upload Errors', is the current step and is highlighted with a red circle and a red underline. The other steps are 'Provide Advisor Assignments', 'Confirm Assignments', and 'Assignments Complete'. Below the progress bar, there are two main sections: 'Advisor Assignments Information' and 'Upload Results'. The 'Advisor Assignments Information' section contains a table with the following data:

Advisor	Semester	Also Update Future Semesters
Primary Advisor	F22 - Fall 2022	Yes

The 'Upload Results' section contains two messages:

- An information message (blue 'i' icon) stating: '3 of 9 advisor assignments will be updated.'
- An error message (red exclamation mark icon) stating: 'The 6 records listed below have validation errors and will not be updated with the other records.'

Green arrows point from the text on the right to the 'Advisor Assignments Information' header and the information message in the 'Upload Results' section.

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.)

Upload Results

i 3 of 9 advisor assignments will be updated.

! The 6 records listed below have validation errors and will not be updated with the other records.

6 Records With Errors

STUDENT LAST NAME	STUDENT USER ID	ADVISOR ID	REASON FOR ERROR
Alfonzo	aalfn	dmbldor	Student's last name does not match the Student User ID
Arcane	farcane	dmbldor	Student does not have a semester record
Arden	marden	cramp	This advisor is not an active Academic Advisor
Brooks	rmb	mcgoni	This advisor holds a similar role for the student
Crosby	Sydc	rhexta	Student's User ID does not exist
Draper	ddraper	hcrane	Multiple degrees exist; updates should be made using Degree Declaration

Page 1 of 1 25 items per page 1 - 6 of 6 items

Email Errors Use this button to have an email with error details sent to you within 2-5 minutes.

[Cancel](#) [Back](#) [Next](#)

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

Upload Advisor Assignments

1 Provide Advisor Assignments 2 Review Upload Errors **3 Confirm Assignments** 4 Assignments Complete

Advisor Assignments Information

Advisor: Primary Advisor Semester: F22 - Fall 2022 Also Update Future Semesters: Yes

Upload Results

3 of 9 advisor assignments will be updated.

Records To Be Updated

STUDENT LAST NAME	STUDENT FIRST / PREFERRED NAME	STUDENT USER ID	CURRENT ADVISOR NAME	NEW ADVISOR NAME	NEW ADVISOR ID	NEW ADVISOR DEPT
Potter	Harry	hpotter		Albus Dumbledore	dmbldor	Headmaster's Office
Granger	Hermione	hgranger	Fillius Flitwick	Minerva McGonagall	mcgonl	Transfiguration Dept
Weasley	Ron	rbweasley	Severus Snape	Minerva McGonagall	mcgonl	Transfiguration Dept

Page 1 of 1 25 Items per page 1 - 3 of 3 Items

Cancel Back **Save**

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

The screenshot displays a four-step progress bar for 'Upload Advisor Assignments'. Step 4, 'Assignments Complete', is the final and active step, indicated by a red underline and a red circle with the number 4. Below the progress bar, a message box titled 'Advisor Assignments Complete' features a large green checkmark icon on the left and the text 'Successfully updated advisor assignments for 3 students .' on the right. A 'Done' button is positioned at the bottom right of the message box.

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.



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