

Guide to Roles and Relationships

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Descriptions and Terminology:

User: A user is any person at your institution who exists within your Starfish system. Users must have a role in the system in order to access Starfish. Typical users of Starfish include students, instructors and advisors.

Role: Each user must have at least one role. Roles define relationships between users, and determine the features and functions of Starfish available to those users. Any given user may have multiple roles.

Privilege Set: Each Role is defined by a Privilege Set in Starfish, which determines the base level access for that user. For instance, privilege sets can determine whether a user has a calendar or can see student contact information and grades.

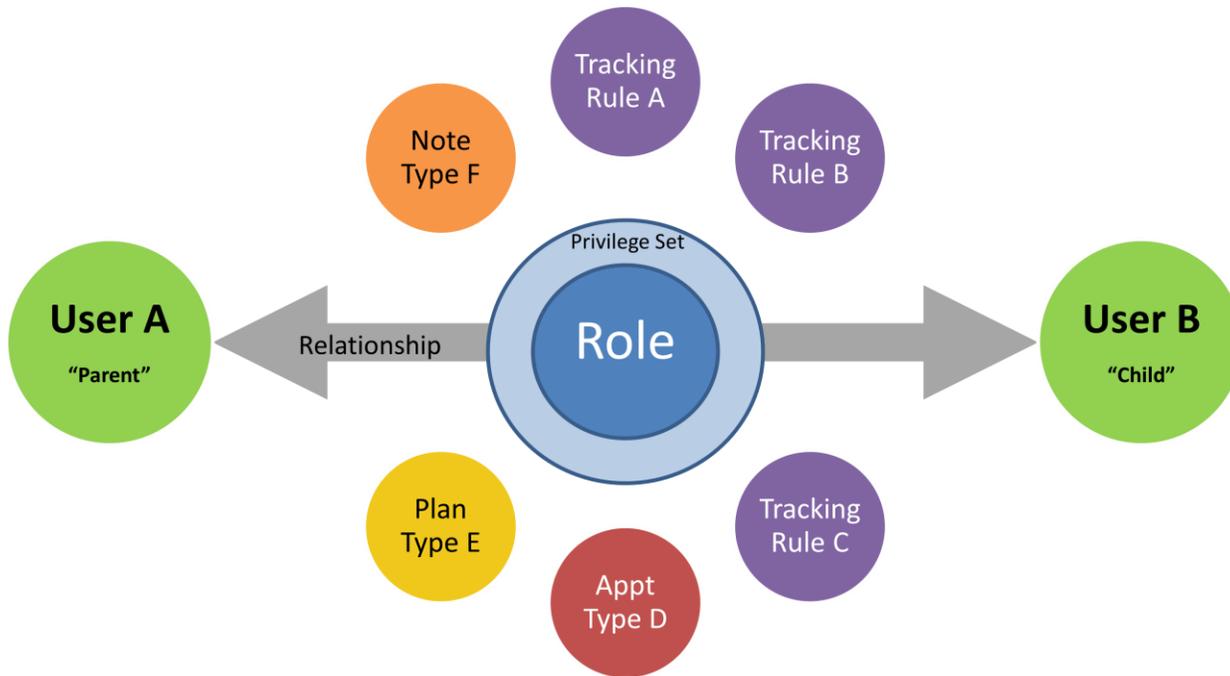
Relationship: Relationships link users and roles. All Starfish relationships are two-way. They are defined by a “parent” role (e.g., Advisor) and a “child” role (e.g., Student). One Starfish user cannot interact with another unless the two share at least one relationship. Any given user may have multiple roles with multiple sets of relationships.

Role Mapping (i.e., “Inherent” Relationships): When Starfish receives data imports about course enrollments (from the LMS or SIS), it automatically generates a relationship between instructors and teaching assistants and their students. This automation is achieved by the default Role Mapping in the system. You can learn more about this in the [Role Mapping](#) section of this document.

Additional relationships (such as those for Advisors, Coaches, and Student Services) can be created in Starfish via Batch Assignment, Role Mapping, and/or SIS Integration.

Integration ID: The unique identifier for a user. Some institutions refer to this as the External Person Key or the BatchUID.

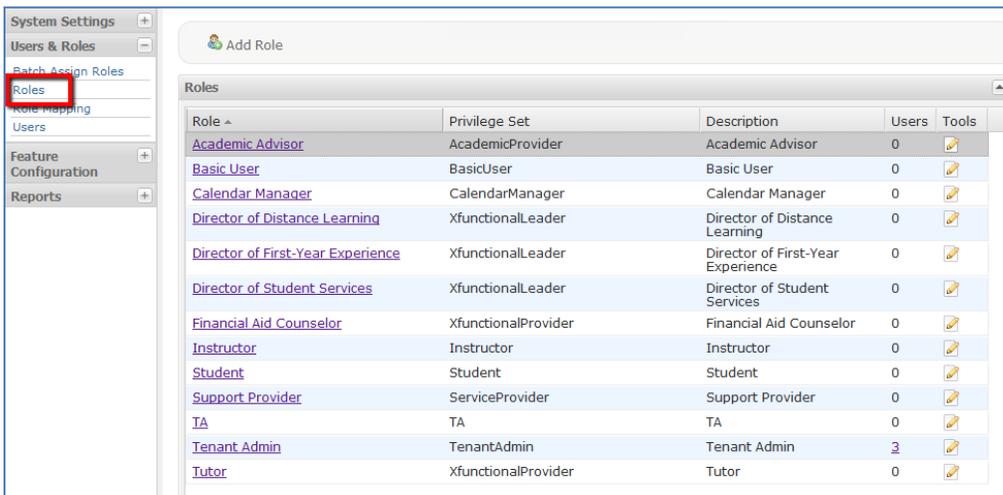
The diagram below depicts the connection between users, roles, privilege sets and relationships.



Adding and Editing Roles:

When viewing the Roles page in Starfish, the count of users that have been assigned each role will be displayed on the right. This is a cumulative count of all users who have ever held the role and is not term specific. For instance, the count of users with the Student Role will rise every term, even if enrollment remains steady.

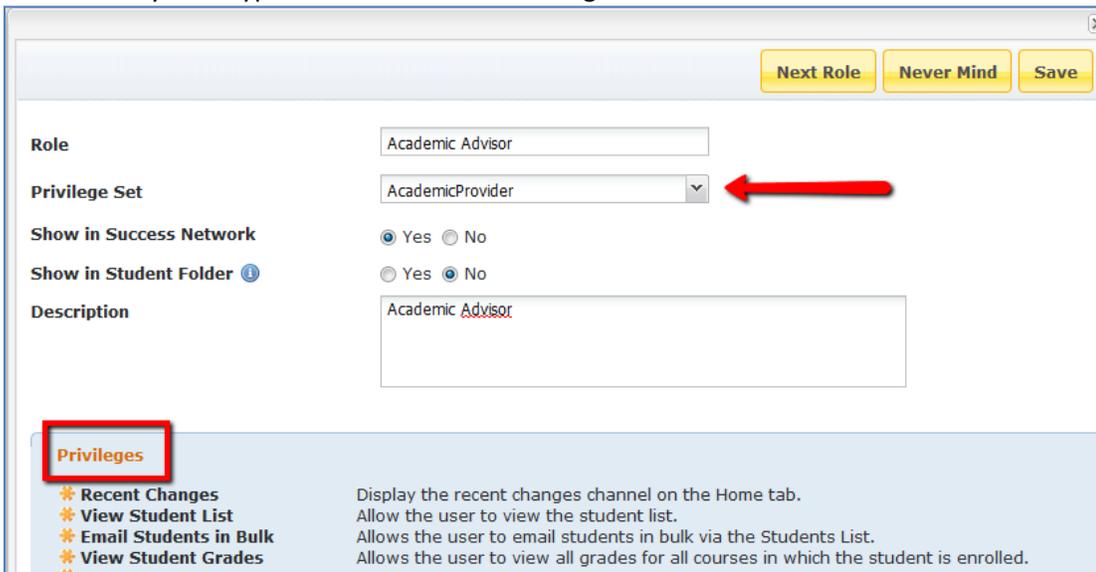
Click Add Role to add a new role to your list. Or click the Edit icon (pencil and paper) to review an existing role. Details on each role are included in the Edit Role pop-up and explained in detail below.



| Role | Privilege Set | Description | Users | Tools |
|---|---------------------|-----------------------------------|-------|-------|
| Academic Advisor | AcademicProvider | Academic Advisor | 0 | |
| Basic User | BasicUser | Basic User | 0 | |
| Calendar Manager | CalendarManager | Calendar Manager | 0 | |
| Director of Distance Learning | XfunctionalLeader | Director of Distance Learning | 0 | |
| Director of First-Year Experience | XfunctionalLeader | Director of First-Year Experience | 0 | |
| Director of Student Services | XfunctionalLeader | Director of Student Services | 0 | |
| Financial Aid Counselor | XfunctionalProvider | Financial Aid Counselor | 0 | |
| Instructor | Instructor | Instructor | 0 | |
| Student | Student | Student | 0 | |
| Support Provider | XserviceProvider | Support Provider | 0 | |
| TA | TA | TA | 0 | |
| Tenant Admin | TenantAdmin | Tenant Admin | 3 | |
| Tutor | XfunctionalProvider | Tutor | 0 | |

The system is pre-configured with a standard set of roles, each assigned the privilege set most likely to be associated with that role on a typical campus. You can use these pre-configured Roles as a guide when you create additional roles on campus.

For instance, the Academic Advisor Role that is pre-configured in Starfish has the Academic Provider privilege set, which allows for users with that role to own a calendar, view student attributes, grades, and profile information, all of which are necessary for a typical Academic Advisor using Starfish.



The following pre-configured roles should never be edited:

- Instructor
- Student
- TA
- Basic User
- Calendar Manager
- Tenant Admin

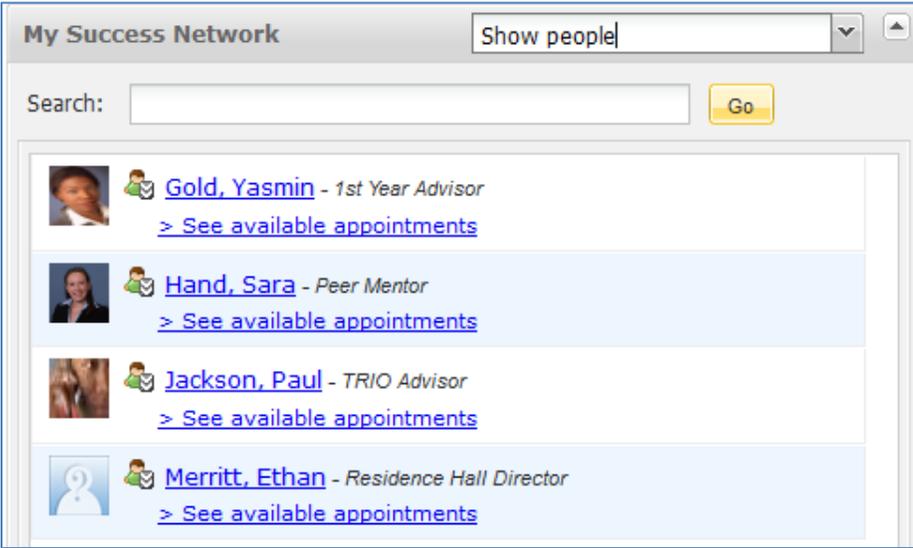
When you create or edit a role, you must make other choices, such as whether an existing relationship with that role should be viewable to the student in the My Success Network channel.



Roles displayed in the student’s My Success Network (on the student homepage) should include people on campus who should be at the student’s fingertips, to schedule appointments or find contact information. You should select “Yes” for Roles like Academic Advisor, TRIO Advisor, Athletics Coach, or others whom students frequently need to contact. The roles of Instructor and TA are shown in the My Success Network by default.

 **Tip:** Be careful about which roles you include so that only the important ones display and students will not have to sort through a long list to find the most important people.

My Success Network channel on a student homepage:



My Success Network Show people

Search: Go

-  **Gold, Yasmin** - 1st Year Advisor
[> See available appointments](#)
-  **Hand, Sara** - Peer Mentor
[> See available appointments](#)
-  **Jackson, Paul** - TRIO Advisor
[> See available appointments](#)
-  **Merritt, Ethan** - Residence Hall Director
[> See available appointments](#)

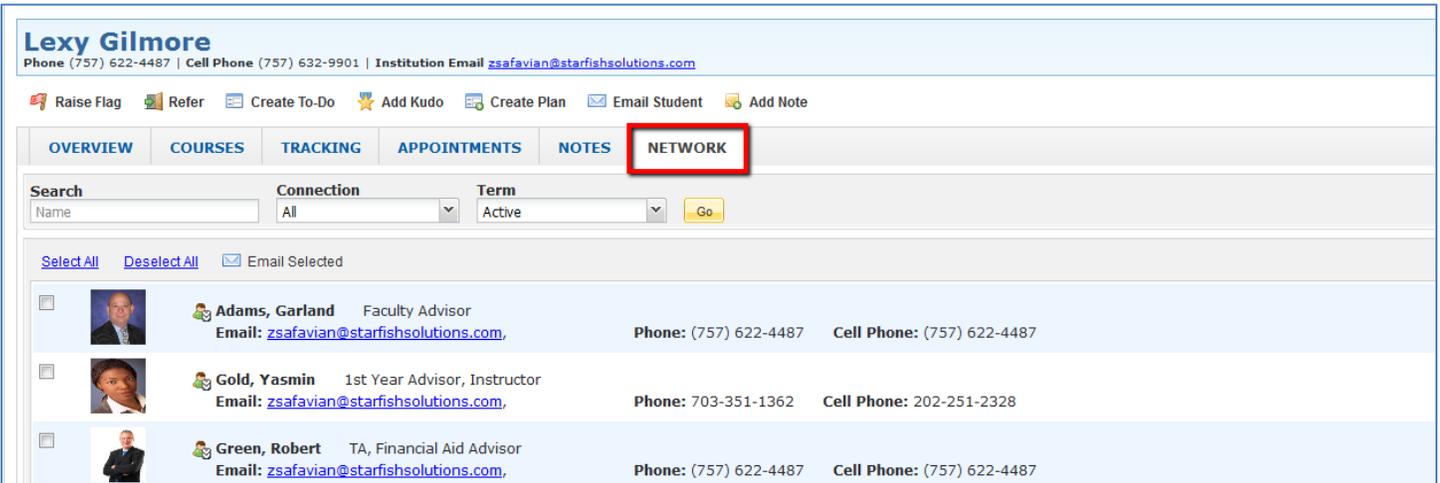
You will also need to decide whether an existing relationship with that role should be viewable by other faculty or staff users in the Network tab of the Student Folder.

Show in Student Folder i Yes No

Roles that display in the Student Folder represent the people that other faculty and staff might need to contact about a student. These roles are displayed in the Network tab of the student folder. By default, this is set to “No” for all roles. You should select “Yes,” however, for roles such as Academic Advisor which might be assigned specific relationships with students, or roles like TRIO Staff, which might have relationships with students in certain cohorts.

For example: selecting “Yes” for the Academic Advisor to display in the Student Folder allows faculty to know who the student’s advisor is so that they can use Starfish to communicate any concerns about that student.

Example of roles shown in “Network” tab of Student Folder:



Lexy Gilmore
Phone (757) 622-4487 | Cell Phone (757) 632-9901 | Institution Email zsafavian@starfishsolutions.com

[Raise Flag](#) [Refer](#) [Create To-Do](#) [Add Kudo](#) [Create Plan](#) [Email Student](#) [Add Note](#)

OVERVIEW **COURSES** **TRACKING** **APPOINTMENTS** **NOTES** **NETWORK**

Search Connection: All Term: Active Go

[Select All](#) [Deselect All](#) [Email Selected](#)

| | | | |
|---|---|-----------------------|----------------------------|
|  | Adams, Garland Faculty Advisor Email: zsafavian@starfishsolutions.com | Phone: (757) 622-4487 | Cell Phone: (757) 622-4487 |
|  | Gold, Yasmin 1st Year Advisor, Instructor Email: zsafavian@starfishsolutions.com | Phone: 703-351-1362 | Cell Phone: 202-251-2328 |
|  | Green, Robert TA, Financial Aid Advisor Email: zsafavian@starfishsolutions.com | Phone: (757) 622-4487 | Cell Phone: (757) 622-4487 |

The Description for a role is optional but can be a helpful way for you to keep track of the distinctive roles you have created, which may assist in maintaining your system over time. The Description is only viewable to Starfish Admins.

| | |
|--------------------|--|
| Description | This is the student's assigned Academic <u>Advisor</u> . |
|--------------------|--|

Once you have selected the desired privilege set and display options, you should click “Save” to complete your new role specifications.

You may contact your Implementation Manager to delete roles that are not assigned to any Starfish users.

Relationship Creation Methods and Walkthrough:

Which Method Should I Use?

Starfish accepts data about relationships in several ways, each of which has benefits and drawbacks. Many institutions use a combination of methods to create relationships, according to what best suits their needs.

Batch Assign Roles:

Batch Assigning roles is used to manually create relationships in Starfish that may not be stored in your Learning Management System (LMS) or Student Information System (SIS). This is also the easiest method for establishing a relationship between users who need a relationship to all students on campus (ex: Provost).

You can access the Batch Assign Roles area in Starfish by logging into Starfish and clicking on the Admin Tab > Users and Roles > Batch Assign Roles. In this area you may upload a flat file (commonly a .txt or .csv file) to assign roles and relationships to your users. This document outlines the steps for creating and uploading flat files. From within Starfish, you can also click the hyperlink for *data format for the batch file* to view details on the accepted formats.

Batch Assign Roles

Instructions

Browse and select a file containing role assignments for users in the system. All role assignments are term specific, so users who are assigned a role will only have the privileges associated with that role for the selected term. Select the delimiter used in the file to separate columns of data.

View detailed information about the [data format for the batch file](#).

Note: The default mode is to create new relationships for the selected group and term. If you select 'Overwrite' then ALL existing relationships for the given group and term will be completely removed and replaced with those in the file you are currently uploading.

Changes made here may take up to an hour to take effect.

Role Mapping File:

Term:

Group:

Create new groups to allow overwriting a subset of role assignments. 

Delimiter: Comma Tab

User Identifier: Integration ID Username

Overwrite: Add to existing relationships Overwrite all current relationships

Before you can create a flat file and upload it to Starfish, the roles must exist within Starfish for the relationships you are creating. If you have not yet created the roles in Starfish, you must do so before moving on.

Creating a Batch Upload File:

Starfish relationships are two-way. There is a “parent” user and a “child” user. When you upload a batch file, you are simultaneously assigning the given roles to the users listed in the file, and establishing the relationship between the users.

In order for Starfish to identify the correct users and assign the intended roles and relationships, the files you create must always use the format described below, with either usernames or integration IDs, and indicating role names identical to those in Starfish.

The general format is:

“ParentUser”, “ParentRole”, “ChildUser”, “ChildRole”

For example:

jsmith01,Academic Dean,jdoe0002,Student

In the example above, you are assigning jsmith01 the role of Academic Dean for jdoe0002, who is a student. This is a one-to-one relationship. Additional [types of relationships](#) are provided later in this document.

The screen shots used below to demonstrate the format of these files are from Microsoft Excel, but you may create the file using Notepad and other similar programs, provided that you save the file in the correct format (.csv or .txt) before loading.



Tip: When using programs like Excel to create the flat file, formatting the cells as Text cells can prevent the program from removing zeros from the beginning of integration IDs.

When creating the file, you must use **either** the username or the integration ID to assign relationships. You will specify the user identifier when loading the file into Starfish.



Recommendation: The integration ID is the unique identifier for a user and is the preferred identifier. To find a user’s integration ID, go to Starfish Admin > Users & Roles > Users.

If the parent user (Column A) is indicated by integration ID, then the child user (Column C) must also be indicated by integration ID. See below.

| | A | B | C | D |
|---|--------|---------------|---------|---------|
| 1 | 123566 | Academic Dean | 0025891 | Student |

Similarly, if the parent user (Column A) is indicated by username, then the child user (Column C) must also be indicated by username. See below.

| | A | B | C | D |
|---|----------|---------------|----------|---------|
| 1 | jsmith01 | Academic Dean | jdoe0002 | Student |

Columns A and B indicate the parent user and parent role, respectively. The user with this role generally holds a faculty, staff, or administrative position at the institution. In the example below, Column A indicates the integration ID of the parent user (123566), and Column B indicates the parent role being assigned (Academic Advisor)

| | A | B | C | D |
|---|--------|------------------|---------|---------|
| 1 | 123566 | Academic Advisor | 0025891 | Student |

Columns C and D indicate the child user and child role, respectively. The user with this role is generally a student. In the example below, Column C indicates the integration ID of the user with the child role (0025891), and Column D indicates the role that the user has in the system (Student).

Note: In most cases, Column D will be Student.

| | A | B | C | D |
|---|--------|------------------|---------|---------|
| 1 | 123566 | Academic Advisor | 0025891 | Student |

The example above creates a **One-to-One relationship** between this Academic Advisor and this student. If this Academic Advisor had 20 advisees, there would be 20 rows in the file, one for each relationship. Relationships can also be course-based, organization-based, or assigned using the allStudents construct described in the Types of Relationships section below.

Types of Relationships

One-to-One relationships are direct relationships between two specific users. When creating a flat file of these relationships, you must establish each specific relationship on a separate row. As such, One-to-One relationship files often contain many rows.

Course-based and organization-based relationships allow a user to be assigned a relationship with all students enrolled in a course or org, without the parent user actually having an enrollment in the LMS or SIS course or org. The most common use case for course-based relationships is Tutoring, where you might assign a Tutor a relationship with all students in a course section.



Tip: Wildcards, such as an asterisk (*) can be used to indicate multiple course sections that share a similar course ID. For example, using BIOL101* in Column C would create a relationship between the user in Column A and all students in sections that begin with BIOL101.

| | A | B | C | D |
|---|--------|-------|-----------------|---------|
| 1 | 123566 | Tutor | BIOL101.04.FA12 | Student |

All Students relationships can be created using a special “allStudents” construct that creates a relationship between the parent user and all students who are actively enrolled for the term.

Note: If a student is not actively enrolled during the term, Starfish will not establish a relationship between the parent user and the un-enrolled student.

| | A | B | C | D |
|---|--------|---------------|-------------|---------|
| 1 | 123566 | Academic Dean | allStudents | Student |

Although you cannot include both usernames and integration IDs in the same file, you can include a mix of relationships. For instance, you can create and load a file that contains both course-based and one-to-one relationships.



Tip: In order to maintain your files during and between terms, Starfish suggests that you make a separate file for each role and name the files accordingly.

Calendar Manager relationships allow users to see and manage each other’s calendars in Starfish. Individual users can establish calendar managers on their own by going to Starfish > Profile > Appointment Preferences. Or, a Starfish Admin can upload these relationships in a batch file.

Note: When assigning Calendar Manager relationships, the child role must always be Basic User.

Example:

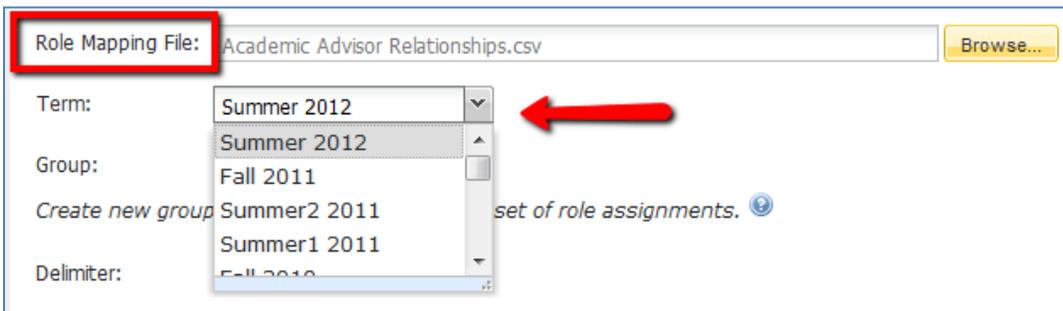
123566,Calendar Manager,456771,Basic User

Uploading the Batch File to Starfish:

Once you have created your relationship file, you need to load it into Starfish by accessing the Admin Tab > Users and Roles > Batch Assign Roles.

Browse for your file. Then use the Term drop down menu to select the term for which the relationships should be assigned.

Note: Because relationships are associated with terms, they will expire at the end of the term for which they were assigned. To learn how to keep your relationships and roles up-to-date, refer to the [Batch Assignment](#) portion of the [Maintaining Relationships During and Between Terms](#) section within this document.



Role Mapping File: Academic Advisor Relationships.csv Browse...

Term: Summer 2012

Group: Fall 2011

Create new group: Summer2 2011 set of role assignments.

Delimiter: Fall 2010

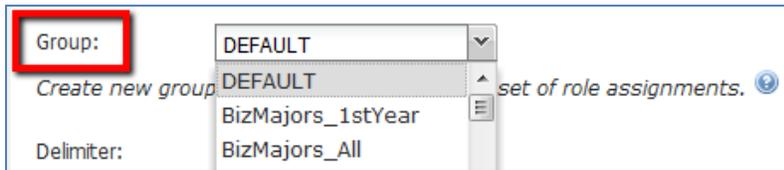
Group: Loading your file into a Group is an optional, but helpful, way for you to organize the files you upload and allow you to make changes in the system during a term. Thoughtfully using these groups will allow you to overwrite relationships in the middle of a term.



Tip: Starfish recommends loading each file into its own Group. For instance, if you wish to load Tutors into Starfish by Batch Assignment, you should consider creating a single, master file for this role and loading it into a corresponding group labeled Tutors.

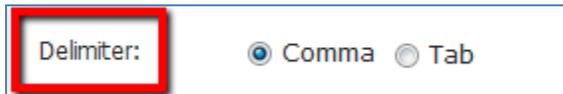
Overwriting Groups will be explained in the Batch Assignment portion of the [Maintaining Relationships During and Between Terms](#) section within this document.

To Group a file, simply check the drop down menu for any groups that already exist in your Starfish system, and add the file to the appropriate Group. If a Group does not yet exist for the file, you can create one by typing over the word “DEFAULT” in the Group window, and replacing it with the name of the group you would like to create.



The screenshot shows a form field labeled "Group:" with a red box around it. Below the label is a dropdown menu with "DEFAULT" selected. Below the dropdown is a text input field containing "DEFAULT". To the right of the text input is a help icon and the text "set of role assignments." Below the text input is a "Delimiter:" label and a dropdown menu with "BizMajors_All" selected. Below the dropdown menu is a "Create new group" link.

Delimiter: Select whether the delimiter (separator) between the fields in your Relationship file is a comma or a tab. If your file is a .csv file, you should select “Comma,” since .csv represents a Comma Separated Value. If your file is a .txt, it may be either comma or tab delimited. Please review your .txt file to make sure you have selected the correct delimiter before uploading.



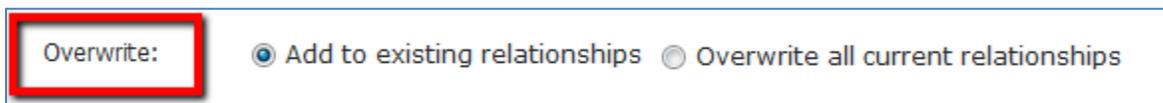
The screenshot shows a form field labeled "Delimiter:" with a red box around it. To the right of the label are two radio buttons: "Comma" (selected) and "Tab".

User Identifier: Select whether the users in your file are indicated by username or integration ID. Starfish will use these identifiers to locate the appropriate users in the system, so the users must already exist within Starfish and the identifier you use must match the indicated user exactly.



The screenshot shows a form field labeled "User Identifier:" with a red box around it. To the right of the label are two radio buttons: "Integration ID" (selected) and "Username".

Overwrite: When loading a file for the first time in a term, you should always choose “Add to existing relationships.” If you wish to replace previous relationships, refer to the Batch Assignment portion of the [Maintaining Relationships During and Between Terms](#) section within this document.



The screenshot shows a form field labeled "Overwrite:" with a red box around it. To the right of the label are two radio buttons: "Add to existing relationships" (selected) and "Overwrite all current relationships".

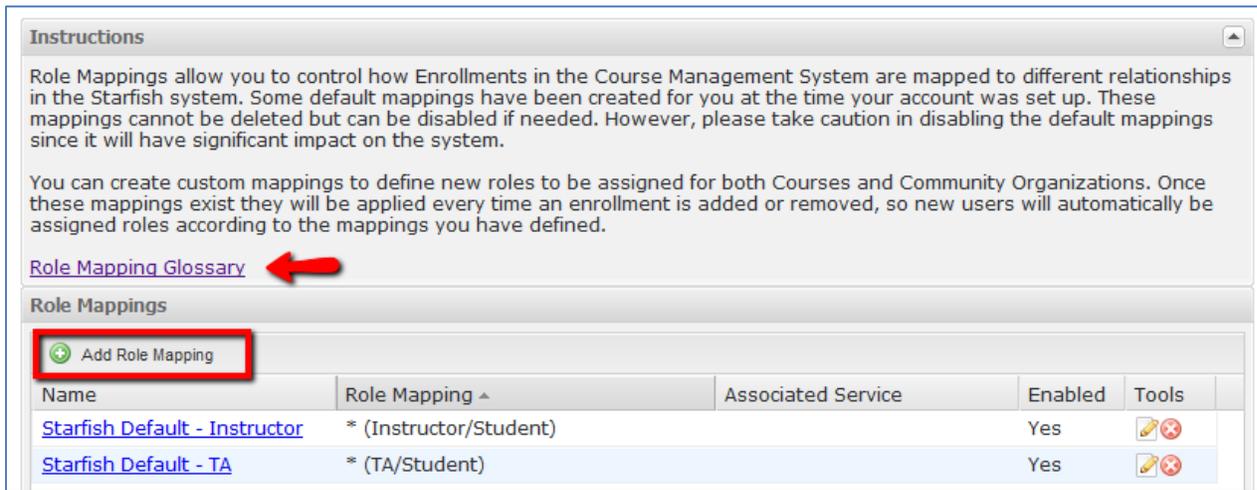
Click Save to upload the file. If the file is loaded successfully, you will see a confirmation of the number of relationships saved. If there was an error, you will receive an error message with details about why you were unable to upload the file. You must correct those errors in the file before Starfish will accept it and create the relationships. For more information about possible errors when batch assigning roles, see the [Troubleshooting](#) section of this document.

Changes made by batch assignment may take up to one hour to take effect.

Role Mapping:

Role Mappings allow Starfish to assign roles based on course and organization enrollments. Starfish includes two pre-configured Role Mappings. The first allows Starfish to recognize users enrolled as Instructors in your LMS or SIS courses to be Instructors in Starfish. The second allows Starfish to recognize users enrolled as Teaching Assistants in your LMS or SIS to be TAs in Starfish. Please consult your Implementation Manager before changing or adding to your list of Role Mappings.

Navigate to Role Mapping by accessing the Admin Tab > Users and Roles > Role Mapping. From here you can view and edit the current Role Mappings for your system, enable or disable existing role mappings, and add new Role Mappings. A Role Mapping Glossary is available within Starfish, and the relevant terminology is also described below.



Instructions

Role Mappings allow you to control how Enrollments in the Course Management System are mapped to different relationships in the Starfish system. Some default mappings have been created for you at the time your account was set up. These mappings cannot be deleted but can be disabled if needed. However, please take caution in disabling the default mappings since it will have significant impact on the system.

You can create custom mappings to define new roles to be assigned for both Courses and Community Organizations. Once these mappings exist they will be applied every time an enrollment is added or removed, so new users will automatically be assigned roles according to the mappings you have defined.

[Role Mapping Glossary](#)

Role Mappings

| Name | Role Mapping ^ | Associated Service | Enabled | Tools |
|---|------------------------|--------------------|---------|---|
| Starfish Default - Instructor | * (Instructor/Student) | | Yes |   |
| Starfish Default - TA | * (TA/Student) | | Yes |   |

Custom Role Mappings are most commonly used to create relationships in Starfish based on organization memberships. For example, if you had an organization for an athletic team where the enrolled “instructor” is the coach of the team and the enrolled “students” are the athletes on the team, you might use a role mapping to tell Starfish to recognize the relationships as such. Once these mappings exist they will be applied every time an enrollment is added or removed, so new users will automatically be assigned roles according to the mappings you have defined.



Tip: Role Mapping can be a low-maintenance way to establish relationships. The courses and organizations that generate the relationships must be continually maintained in your LMS or SIS in order for this method to be effective.

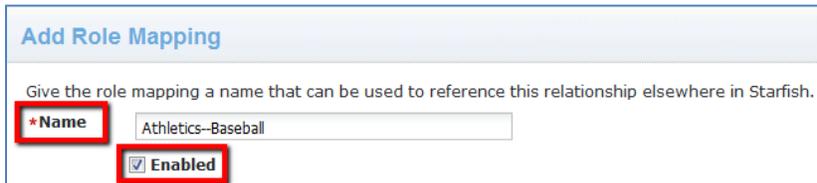
Creating Custom Role Mapping:

To set-up Role Mappings in Starfish, you must first create an Organization or Course in your LMS or SIS (depending on your integrations). This course/organization should be named uniquely enough that it is easily distinguishable from others, allowing Starfish to correctly reference it when creating the resulting relationships.

Next, navigate to the Role Mapping screen and click on “Add Role Mapping.” Assign a **Name** to the role mapping you plan to create. The name should indicate which roles and relationships are being established.

Enabled: This box is checked by default and, when selected, indicates that the role mapping is currently enabled and actively establishing relationships. When a role mapping is disabled, any relationships which had previously been created are removed and no new relationships are created until the role mapping is re-enabled.

Note: If you disable the default role mappings for Instructors and TAs these relationships will no longer exist and users will not be able to interact!



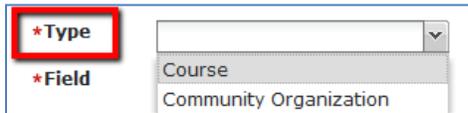
Add Role Mapping

Give the role mapping a name that can be used to reference this relationship elsewhere in Starfish.

***Name** Athletics--Baseball

Enabled

Type: Indicate the Type, either a Course or Community Organization, to which the role mapping will be directed when establishing the relationships.



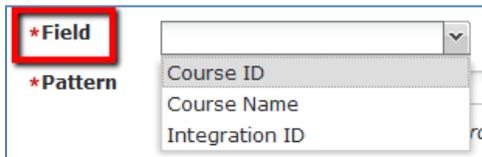
***Type**

***Field**

Course

Community Organization

Field: Indicate the Field to establish whether Starfish should reference the Course ID, Course Name, or Integration ID of the course/organization containing the role mapping enrollments. The recommended field is Course ID.



***Field**

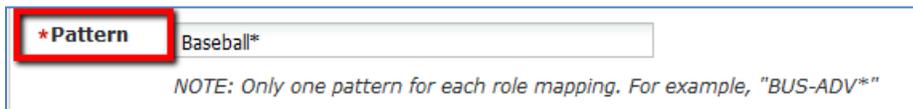
***Pattern**

Course ID

Course Name

Integration ID

Pattern: Indicate the course or organization ID pattern. The pattern is used to match courses or orgs and can include a wildcard * or be an exact match. For example, if each of your athletic organizations begin with ATH, you enter ATH* to allow the role mapping to apply to all athletic organizations.



***Pattern** Baseball*

NOTE: Only one pattern for each role mapping. For example, "BUS-ADV"*

Mapping: Indicate the types of enrollments in the course/organization to be mapped, and then the role in Starfish with which that enrollment should be associated. Often, the Parent Enrollment is Instructor and the Child Enrollment is Student, which correspond to a Starfish parent role usually held by faculty or staff, and the Starfish Student role. If you would like to map the Starfish roles differently, consult with your Implementation Manager about your options.

The example role mapping below tells Starfish to read the Parent Enrollment of Instructor in this organization as TRIO Advisor in Starfish, and to read the Child Enrollment of Student as Student in Starfish.

| | | | | |
|------------------|-------------------|------------|---------------|--------------|
| * Mapping | Parent Enrollment | Instructor | Starfish Role | TRIO Advisor |
| | Child Enrollment | Student | Starfish Role | Student |

Service: Role mapping can be used to populate a Service with memberships. If you would like the users with the Parent Enrollment to be members of a related service, select that service from the drop down menu. This is optional.

If this mapping should be used to populate a service with members, select the service in the menu below. All users with the parent enrollment in courses/organizations that match the pattern specified will be made members of the selected service.

| | |
|------------------|-------------------------------|
| Service | No Associated Service |
| * Required field | Advising for Engineering S... |
| | Advising for Fine Artists |

Once you are satisfied with the Role Mapping configurations you have entered, click “Submit” to begin establishing the associated relationships.

SIS Integration

Relationships can also be automated through SIS integration. If relationships, such as those between advisors and their advisees, are maintained in your Student Information System (SIS), they can be established in Starfish via SIS integration. SIS integration allows you to query relationships stored in your SIS and send them to corresponding roles created in Starfish. If you have not integrated your SIS with Starfish, or if your SIS integration is not taking advantage of this option, consult with your Implementation Manager to learn more.

Maintaining Relationships During and Between Terms:

Relationships may require maintenance during and/or between terms. For relationships established by Role Mapping or SIS integration, little manual intervention is needed as long as the data is flowing on a regular basis. For manually Batch Assigned roles, the relationships must be actively maintained within Starfish each term, and sometimes may need to be overwritten within a term.

Note: Many institutions establish relationships in multiple ways. Remember to consider all methods of establishing relationships and be aware of the associated maintenance.

SIS Integration:

Relationships created through SIS integration are generally maintained on a continual basis so that as relationships are updated in the SIS, they are likewise updated in the Starfish system. A process for maintaining the relationships should be established during the initial SIS integration. If you are uncertain about how your SIS relationships are maintained, check with the SIS technical lead at your institution to verify that the relationships are being regularly updated in the SIS, that Starfish is receiving daily imports from the SIS adapter, and that the Term parameters set to query the database are also updated at the start of each new term.

Role Mapping:

Relationships created through Role Mapping are generally maintained on a continual basis by continually updating the associated course or organization in the LMS or SIS that is establishing the relationships, which in turn update the relationships in Starfish.

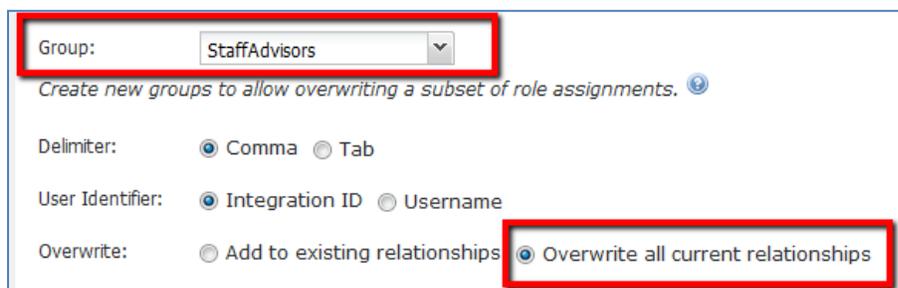
Note: If the course or organization that is generating the role mapping has an associated term, that term must remain active for the relationships to remain active. Sometimes institutions elect to create unique terms in their system that are specific to these courses. Each term, you should verify the end date is not approaching expiration by going to Starfish Admin > System Settings > Terms.

Batch Assignment:

Relationships created via Batch Assignment must be updated each term even if the relationships have not changed.

Because these relationships are assigned to a Term when created, if you do not reupload the file for the subsequent term the relationship will not persist.

During the term, you may need to make changes to existing relationships, as students are assigned new advisors, faculty and staff come and go, and tutors begin or end their employment. You may do so by updating the original file and Overwriting the Group into which you loaded that file.



Group:

Create new groups to allow overwriting a subset of role assignments. ⓘ

Delimiter: Comma Tab

User Identifier: Integration ID Username

Overwrite: Add to existing relationships Overwrite all current relationships

Please note that when you Overwrite, **you are replacing all files loaded into a Group** with the new file you are uploading. This is why using a single file per group is ideal. If you have loaded several different files into the same group, either consolidate those files into a single, updated file before choosing the Overwrite option, or **consult with your Implementation Manager to avoid accidentally deleting relationships** from your system.

Note: The DEFAULT Group should never be Overwritten. If you have uploaded relationships to the DEFAULT group and need to update them in the middle of a term, contact your Implementation Manager to discuss your options.

Viewing Roles/Relationships in Starfish:

To verify that the correct relationships have been established in Starfish, you can view them in several ways. Keep in mind that relationships must be processed before they are visible. For Batch Assigned relationships, this may take up to one hour. For relationships being established or updated through SIS or Role Mapping, this could take much longer, depending on when the information was updated in your SIS or enrollments, and when your Starfish imports are scheduled.

 **Tip:** View your recent imports and log files by going to Starfish Admin > System Settings > Import Status.

Relationships Report

To view additional details about relationships by Role and Term, the Starfish Relationships Report can be run to verify the relationships that currently exist in your system as well as how they were created. Go to Starfish Admin > Reports > Relationships. Select a term and a role. Then click the Generate Report button. When the report is ready it will be listed in your Report Queue as a hyperlink. The link will open the file in Microsoft Excel.

Relationships created via SIS will be indicated with “SIS” in the Source ID column. Relationships created via Role Mapping will be displayed with the Source ID column empty, but the associated course will be displayed in the Course column. Relationships created via Batch Assignment will be displayed with the Source ID column indicating the Group into which the file was uploaded.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|------------------|-------------|------------------|-----------|------------|----------|--------------|----------------|-------------------|--------------------|
| Source ID | Term Name | External User ID | Last Name | First Name | Username | Type | Course | Student Last Name | Student First Name |
| | Spring 2012 | 123456 | Gold | Yasmine | ygold | Role Mapping | BIOL101.109.04 | Egon | Adam |
| General Advising | Spring 2012 | 123456 | Gold | Yasmine | ygold | All Students | | | |
| SIS | Spring 2012 | 123456 | Gold | Yasmine | ygold | One to One | | Lands | Rachel |

Display of Relationships

Any user with one or more “parent” roles can view their relationships by going to Students > My Students > Connections. Users should utilize the Term drop down menu to help navigate through various relationships.

Search: **Connection:** **Term:**

| Name | Email | Phone | Cell Phone |
|--|----------------------------|----------------|----------------|
| <input type="checkbox"/> Albright, Randy | Randy.Albr | (757) 622-4487 | (757) 622-4487 |
| <input type="checkbox"/> Gilmore, Lexy | zsafavian@ | (757) 622-4487 | (757) 632-9901 |
| <input type="checkbox"/> Lands, Rachel | jburke@st | (757) 622-4487 | 512-695-6257 |
| <input type="checkbox"/> Student, Jane | zsafavian@ | (757) 622-4487 | 512-695-6257 |

Dropdown menu for Connection:

- All Students
- 1st Year Advisor
- Business Majors - First Year Only
- Instructor
- All Courses
- General Biology I
- BIOL101.109.04**
- Microbiology
- BIOL220.109.01**

Troubleshooting:

What if...

1. Batch Assigning relationships produces an error?

You may encounter an error loading your file if a username does not exist in the system, the Role does not exist in the system or does not match the name of the Role in the system, or if your file is formatted incorrectly. The error should indicate the nature of the problem, but if you have additional questions, contact Starfish Support.

2. Fewer relationships than I expected are “saved” when Batch Assigning Roles?

Relationships are saved based on the number of data rows rather than the number of unique relationships. For instance, an allStudents relationship is “saved” as a single relationship, even when there are hundreds of students with whom a relationship would be established. Similarly, if a relationship already exists in the system, it will not be counted as “saved” again. So if you load a file with 5 relationships and save it, and then reload the same file with an additional relationship, you will see one relationship saved the second time, rather than 6 relationships saved.

3. After Batch Assigning a new relationship file, old relationships have disappeared from Starfish?

Is it possible that you selected “Overwrite” when loading the relationships? If you overwrite a group with a file that does not include relationships previously uploaded to the group, the omitted relationships will be deleted when you save the file. Review the [Batch Assignment portion of the Maintaining Relationships During and Between Terms](#) section within this document as a reminder about how to overwrite relationships. Remember to never overwrite the DEFAULT group!

4. Relationships that are created from Role Mapping suddenly stop working?

Verify that the Role Mapping is still enabled. Check that the courses/organizations used to create the Role Mapping are within an active term in Starfish and that the enrollments in those courses or organizations are still active in your LMS or SIS system.

5. Starfish does not allow me to upload a relationship to a user that I know exists?

Are you filtering the data coming over to Starfish? Remember that even though Starfish is reading data from your LMS or SIS, if you are restricting the data in some way, not all users may exist in Starfish. You can check to see if a user exists in your Starfish system by going to Admin > Users & Roles > Users. Sometimes, a “dummy” course is used to enroll certain users in a course so their user accounts can come over to Starfish. Contact your Implementation Manager to discuss the best approach for your situation.

Technical Support:

Contact us at support@dostarfish.com. If you received a specific error message, please send a screenshot.