

PGR Manager Supervisor and Approvers Guide

Directly Support and
Affiliated Research Centres (ARCs)

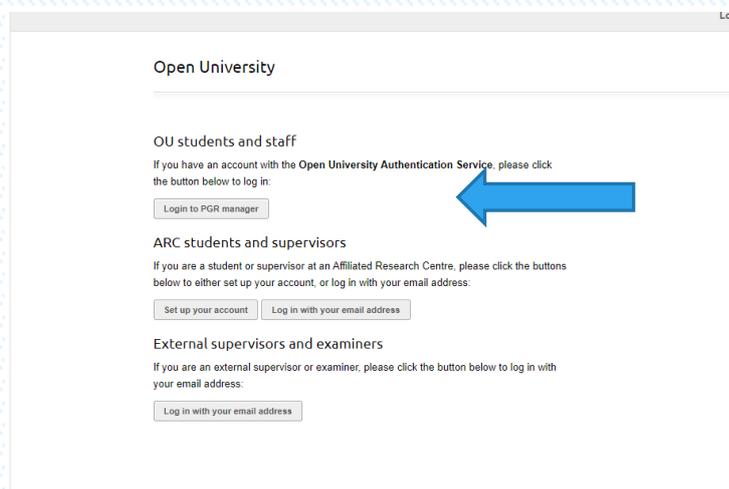
Contents Page

Logging in for the first time	Page 3
Introduction and Supervisor View	Page 4
Confirmation and Project Page	Page 5
Supervision Meetings	Page 6
.....	Page 7
.....	Page 8
Change Requests	Page 9
.....	Page 10
.....	Page 11
.....	Page 12
.....	Page 13
.....	Page 14
.....	Page 15
.....	Page 16
.....	Page 17
.....	Page 18
.....	Page 19
.....	Page 20
.....	Page 21
Absences	Page 22
.....	Page 23
.....	Page 24
Upgrade	Page 25
.....to	Page 34
Re-Registration	Page 35
.....	Page 36
Examinations.....	Page 37
.....to	Page 51
Additional Information	Page 51

Logging in

- Logging into the PGR Manager system for the first time.
- To log into the system or the first time you will be presented with a Login Page as shown.

Fig 1.



Open University

OU students and staff
If you have an account with the **Open University Authentication Service**, please click the button below to log in:

ARC students and supervisors
If you are a student or supervisor at an **Affiliated Research Centre**, please click the buttons below to either set up your account, or log in with your email address:

External supervisors and examiners
If you are an external supervisor or examiner, please click the button below to log in with your email address:

- If you are a **Directly Supported student at the Open University**, please select the login button as shown, to enter the system you will need to provide an email address using your OUCU and OU password.
For example: OUCU@open.ac.uk No other email addresses will be permitted.
- If you are a student from our **Affiliated Research Centres (ARC)** then you will be presented with this screen. Using your ARC email address supplied by your relevant ARC.

Fig 2.

ARC account setup

If you are an ARC student or supervisor who is logging in for the first time, please input your email address below. An email will be sent to you with instructions on how to set up a password and access PGR manager.

Email address:

If you have previously setup your account, click the link below to go to the login page.

[Log in with your email address »](#)

Introduction and Supervisor View

- Once signed into the system you are presented with a Noticeboard Screen. To view all students that are assigned to you select the My Students screen on the right-hand side of the screen as shown.

Fig 3

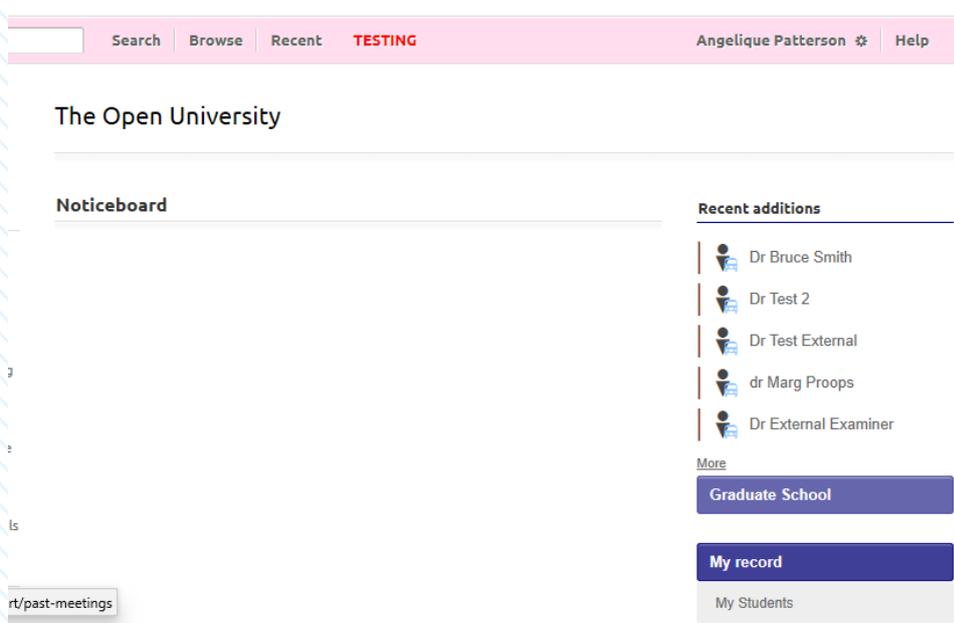
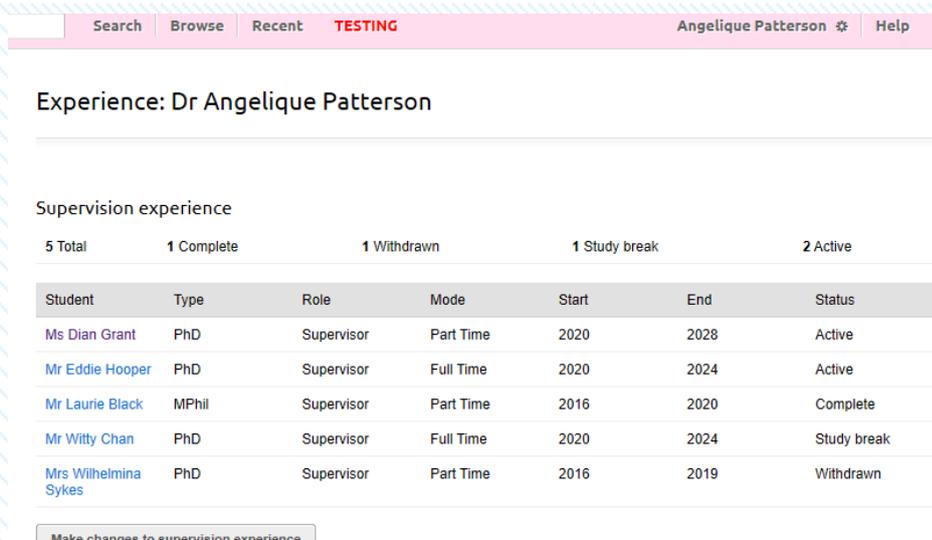


Fig 4



This screen details the students assigned to the supervisor. Also shown on the screen shot is the status, mode, start and end of the student's registration.

- This preview shows the status of all activities during the student journey, showing important dates as the student progresses.
- To view any student assigned, click on the student in question on the Experience: Supervisor name screen as shown below:

Fig 5

Experience: Dr Angelique Patterson

Supervision experience

5 Total 1 Complete 1 Withdrawn 1 Study break 2 Active

Student	Type	Role	Mode	Start	End	Status
Ms Dian Grant	PhD	Supervisor	Part Time	2020	2028	Active
Mr Eddie Hooper	PhD	Supervisor	Full Time	2020	2024	Active
Mr Laurie Black	MPhil	Supervisor	Part Time	2016	2020	Complete
Mr Witty Chan	PhD	Supervisor	Full Time	2020	2024	Study break
Mrs Wilhelmina Sykes	PhD	Supervisor	Part Time	2016	2019	Withdrawn

[Make changes to supervision experience](#)



- Once selected you are presented with the project details screen of the student you have selected. By selecting on the tabs on the right-hand side of the screen you can see the status of any action or activity that the student has requested and the status showing where in the process it lies. The screens will also show who the current request is with. Also noted on the screen is an overview of the Title of the student's Thesis title, current supervisors, Students, Project Status, Project Mode, and important dates. This screen also shows any activities that are outstanding and/or requested.

Fig 6

Fact person by and level state community president

Title	Fact person by and level state community president
Student	Ms Dian Grant
Supervisor	Prof Lyn Carter Dr Angelique Patterson
Student Project Status	Active
Project mode	Part Time
Student Project Type	PhD
Student Project Stage	Registered

	Date completed	Deadline	Reminder sent
Project start	29 May 2020		
Project end		29 May 2028	

- [Project history](#)
- [Project dates](#)
- [Supervision meetings](#)
- [Induction](#)
- [Progress review](#)
- [Re-registration](#)
- [Examination](#)



Supervision Meetings

- The student or supervisor can add records on to the PGR Manager system as evidence of the meetings. Once the student has submitted their notes all members of the supervising team are issued with an email advising them of the recent addition to the system and that there is an action attached to it.

Fig 7

Supervision meeting - 15 Feb 2021 - Ms Dian Grant

Supervision Meeting

Student	Ms Dian Grant
Title	Supervision meeting - 15 Feb 2021 - Ms Dian Grant
Date	15 Feb 2021
Project	Fact person by and level state community president
Participant	Ms Dian Grant Prof Lyn Carter Dr Angeliq Patterson
Academic year	2020 - 2021

Meeting

Participants
Ms Dian Grant
Prof Lyn Carter
Dr Angeliq Patterson

Date, time and location

Meeting date
15 Feb 2021

STATUS
Waiting for Prof Lyn Carter to review the notes

CURRENTLY WITH
Lyn Carter

Supervision notes

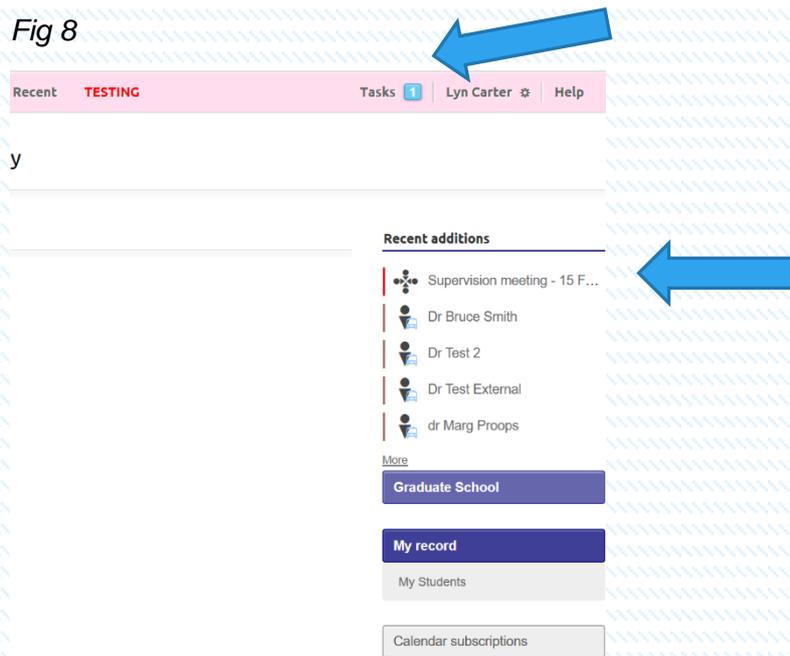
Meeting did not take place

Download printable PDF...

CHECKLIST
✓ Date scheduled
✓ Researcher's notes
✓ Meeting has taken place
✓ Action points

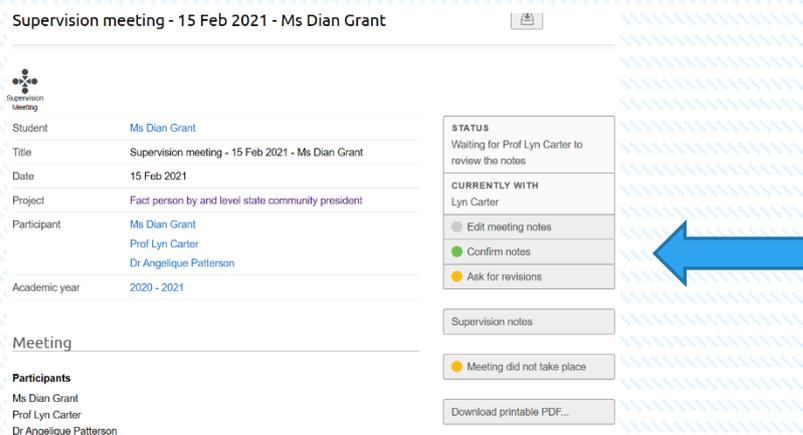
- Shown in the screen above is the submitted information to the supervisor from the student showing notes from the supervision meeting. Also noted on the right-hand screen in Fig 7 is the STATUS bar showing who the request is currently with and what action needs to be taken. In this instance this request shows that the STATUS is Waiting for Prof Lyn Carter to review the notes.
- To note the student can also see the STATUS and who the request is with.
- Once the supervisor Prof Lyn Carter signs into the system she will notice a new task/request at the top showing that she has 1 Task to action. Also noted in the Recent additional field that this also shows an outstanding task.

Fig 8



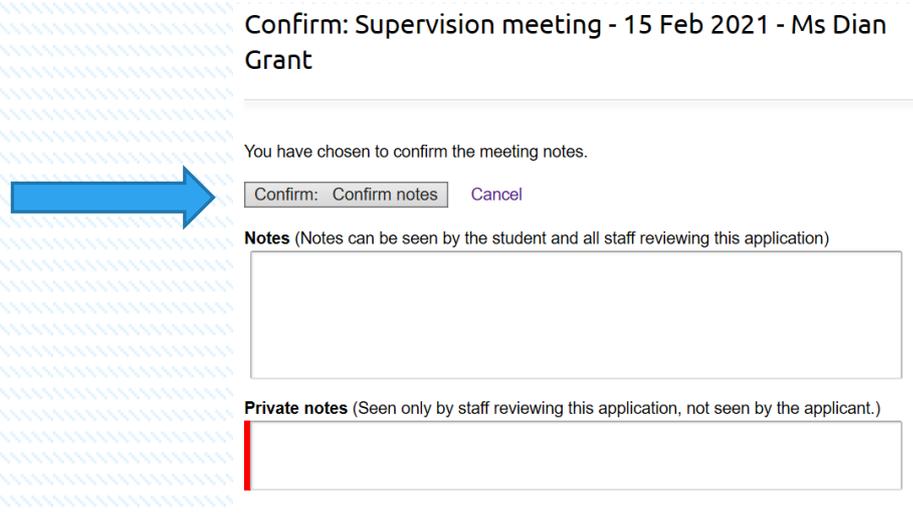
- Either selection can be made I have chosen the Recent additions function which shows.

Fig 9



- Once accessed you (the supervisor) are asked to confirm notes which are indicated by the green dot confirm notes on the right-hand side of the screen as indicated by the blue arrow. You can also review the notes in a different format by clicking the Supervision notes on the right-hand side or you may wish to Download printable PDF as indicate on the right-hand side.
- Once you ready to approve and confirm the notes select the green dot to Confirm notes. As indicated below.

Fig 10



Confirm: Supervision meeting - 15 Feb 2021 - Ms Dian Grant

You have chosen to confirm the meeting notes.

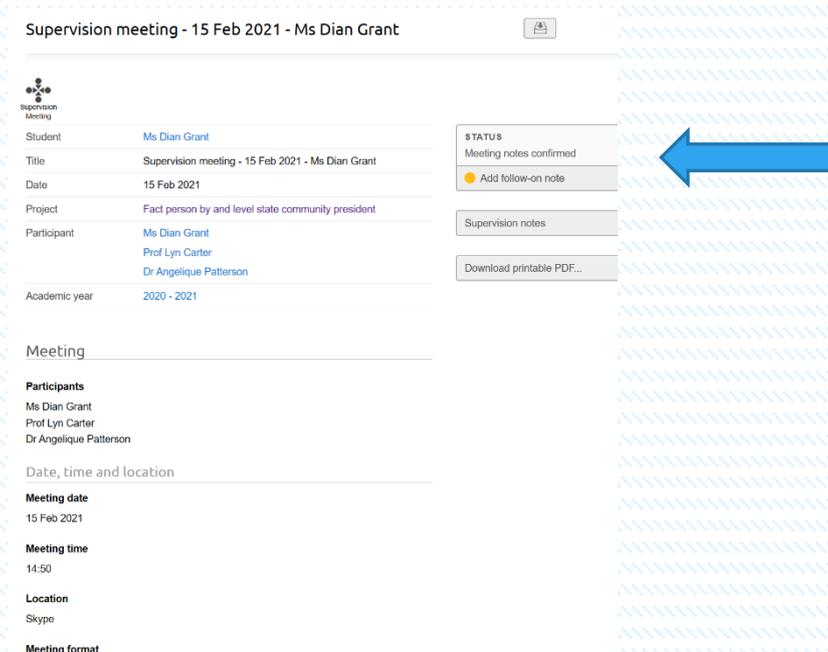
Confirm:

Notes (Notes can be seen by the student and all staff reviewing this application)

Private notes (Seen only by staff reviewing this application, not seen by the applicant.)

- Once confirmed you are presented with the Confirm: Supervision meeting – date and student name screen.
- Where, as the supervisor you can confirm the notes. You can also provide any additional notes here, bearing in mind that the student and other supervisors can read the notes (as indicated in the box) by the Private notes below the Notes screen is a private Staff Only screen that can only be seen by members of the staffing team.
- Once happy to confirm. Select the Confirm button.

Fig 11



Supervision meeting - 15 Feb 2021 - Ms Dian Grant

Student	Ms Dian Grant
Title	Supervision meeting - 15 Feb 2021 - Ms Dian Grant
Date	15 Feb 2021
Project	Fact person by and level state community president
Participant	Ms Dian Grant Prof Lyn Carter Dr Angelique Patterson
Academic year	2020 - 2021

Meeting

Participants
Ms Dian Grant
Prof Lyn Carter
Dr Angelique Patterson

Date, time and location

Meeting date
15 Feb 2021

Meeting time
14:50

Location
Skype

Meeting format

STATUS
Meeting notes confirmed

- Once confirmed the Status bar changes and advises you that the Meeting notes are confirmed. Please note as previously advised, that this function can be initiated by any member of the supervising team or the student. Supervision notes stay on the system and can be reviewed at any time. There is also an archive system so all previous notes for the student can be reviewed and downloaded as appropriate throughout the student journey.
- All supervisors are obliged to confirm the notes using the same process as above. Email confirmations to all supervisors and student take place throughout the functions until all are completed.

Change requests

- A change request is typically submitted by the student or supervisor to request a change to registration e.g. study break, extension and change of mode and attendance etc. Upon approval, project dates and status are updated.
- You (the supervisor) will notice that on your Experience: supervisor name screen that there is an outstanding task for one of your students.
- Select the Tasks button as shown. This task is showing that you have an outstanding action for your review and approval. In this case a Study Break for student name.

Fig 12

The Open University

Search Browse Recent TESTING Tasks Tamarra Giles Help

Experience: Prof Tamarra Giles

Supervision experience

5 Total 2 Complete 3 Active

Student	Type	Role	Mode	Start	End	Status
Mrs Ilka Brennan	PHD	Supervisor	Full Time	2019	2023	Active
Mr Aamir Butcher	PHD	Internal	Full Time	2020	2020	Active
Mrs Jonis Marsh	MPhil	Supervisor	Full Time	2019	2023	Active
Sergeant Ellis	PHD	Supervisor	Part Time	2013	2018	Complete
Mr Stanwood Stephenson	PHD	Supervisor	Full Time	2014	2019	Complete

Make changes to supervision experience

- Select the study break as indicated below. Also noting that you would have received an email notifying you of the outstanding action.

Fig 13

Tasks

Show future tasks

Study break - Mr Aamir Butcher
Please review this change request
Full info...

Fig 14

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

Tasks

- Study break
 - Waiting for supervisor to review
 - Aamir Butcher started the process 01 Dec 2020, 12:04
 - Aamir Butcher submitted the request 01 Dec 2020, 12:06

STATUS: Waiting for supervisor to review

CURRENTLY WITH: Tamarra Giles

Buttons: Delegate this task, Submit supervisor review, Return to submitter



To delegate the task to another member of the supervising team select this button and delegate.

- Once selected the Study Break – student name appears showing the STATUS – Waiting for supervisor to review is shown and whom the action is currently with. In this case the task is with Tamarra Giles who is the student’s supervisor.
- Also noted on the screen under the Tasks box is the current action awaiting review and any historical events relating to the student journey.
- You the supervisor can at this point delegate this task to another member of the supervisory team or the other members of the team can also take this task for approval. To delegate the task, select the Delegate the task button on the right-hand side of the screen.
- All member of the possible supervisors who can undertake this task are shown on the Delegate: Study Break – student name screen as shown below.

Fig 15

Delegate: Study break - Mr Aamir Butcher

Study break - Mr Aamir Butcher

Delegate this task to:

Buttons: Cancel, Dr Fred Peters, Dr Tami Rahman, Dr Duffy Warren



- Select the appropriate supervisor to delegate the task to.

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

STATUS: Waiting for supervisor to review

CURRENTLY WITH: Fred Peters

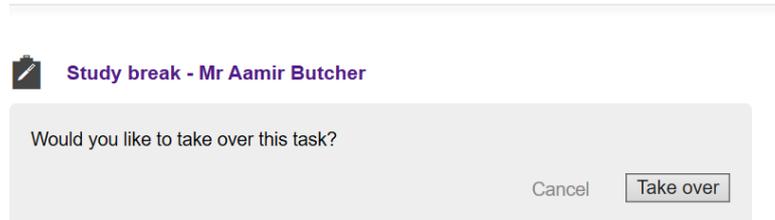
Buttons: Take over this task, Change request form



- A prompt is displayed for the approver to confirm that they task is to be taken over.
- In this instance Dr Duffy Warren.
- Once selected the delegate needs to confirm that this task is to be taken over.
- Select Take over button on the Take-over: study break student name screen

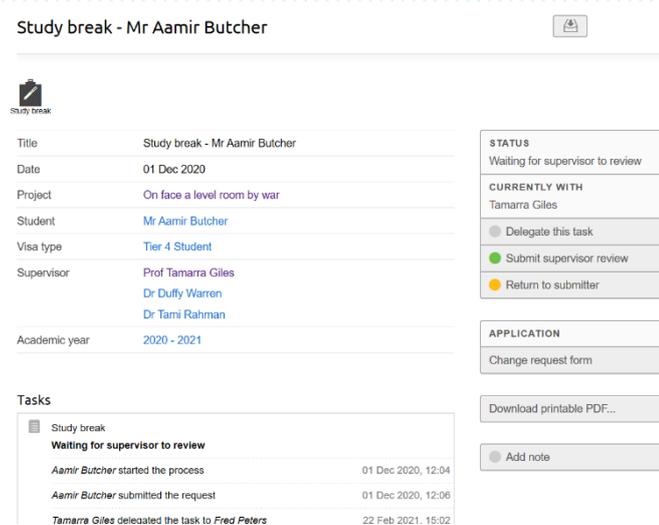
Fig 16

Take over: Study break - Mr Aamir Butcher



- Once ready to approve. View the study break request by selecting the Application field Change request form. Which enables the approver to review the task approve/decline information within it. The request can also be sent back to the student if the information provided is incorrect etc.

Fig 17



- Once selected all details entered by the student can be reviewed here. Once happy to approve select the back arrow on the left of the top of the screen, which takes you back to the approver screen once again.

Fig 18



[← Back](#)

Study break - Mr Aamir Butcher: Change request form

Home

Open University
Faculty of Arts & Social Sciences
Faculty of Science, Technology, Engineering and Mathematics
Faculty of Wellbeing, Education and Language Studies
The Open University Business and Law Schools
ARC Institutes

Committees
Upcoming meetings
Past meetings

Thesis title

Thesis title
On face a level room by war

Do you wish to update your thesis title?
No

Request

Start date of study break
01 Dec 2020

Length of study break
1 month

Main reason for study break
Internship or placement

Students in receipt of a stipend taking a study break on the grounds of partit

Fig 19

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahiman
Academic year	2020 - 2021

STATUS
Waiting for supervisor to review

CURRENTLY WITH
Tamarra Giles

Delegate this task

Submit supervisor review

Return to submitter

APPLICATION
Change request form



Fig 20

- Once happy with the approval select the green button Submit supervisor review screen

Edit Supervisor form: Study break - Mr Aamir Butcher

Please include a statement in support of this request and include information about the student's progress to date *

[Save and continue](#) [Save for later](#)



- As indicated on the Edit Supervisor form: study break – student name screen. Add a statement in support of this request and include information about the student's progress as indicated in the required field.
- Don't forget to Save and continue to confirm your approval. You (the supervisor) will be asked to confirm the details and once happy to approve select the green Continue button.

Fig 21

Review: Study break - Mr Aamir Butcher

Review Confirm

Please review the information below before continuing.

Continue

Thesis title

Thesis title
On face a level room by war

Do you wish to update your thesis title?
No

Request

Start date of study break
01 Dec 2020

Length of study break
1 month

Main reason for study break

Fig 22

Progress: Study break - Mr Aamir Butcher

Review Confirm

You have chosen to progress the application to the next stage

Confirm: Progress Cancel

Notes (Notes can be seen by the student and all staff reviewing this application)

- To confirm the approval, select the Confirm Progress button and add any notes as appropriate, noting that the student can see the notes box.

Once the approver in this instance the supervisor has approved the request. It is then passed up the chain to the next approver for their authorisation. In this case this is an Affiliated Research Centre, student so the next step is for the ARC Coordinator for their approval.

Affiliated Research Centre students only

Fig 23

Study break - Mr Aamir Butcher

Study break

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

Tasks

Study break

Waiting for ARC Coordinator to review

Aamir Butcher started the process	01 Dec 2020, 12:04
Aamir Butcher submitted the request	01 Dec 2020, 12:06
Tamarra Giles delegated the task to Fred Peters	22 Feb 2021, 15:02
Tamarra Giles took the task over from Fred Peters	22 Feb 2021, 15:05
Tamarra Giles delegated the task to Duffy Warren	22 Feb 2021, 15:05
Tamarra Giles took the task over from Duffy Warren	22 Feb 2021, 15:09
Tamarra Giles progressed the request	22 Feb 2021, 15:25

STATUS
Waiting for ARC Coordinator to review

CURRENTLY WITH
Jeanie Hudson

APPLICATION
Change request form

ASSESSMENT
Supervisor form

Download printable PDF...

Add note



- As you can see from the STATUS field that the action is Waiting for ARC Coordinator to review the task and approve/decline as appropriate.
- The ARC Coordinator will be issued with an automated email informing them that a task is waiting for action. And shown on the system in the Tasks bar at the top of the screen as shown.

Fig 24

Browse | Recent | TESTING | Tasks 1 | help

iversity

Recent additions

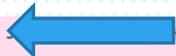
- Dr Bruce Smith
- Dr Test 2
- Dr Test External
- dr Marg Proops
- Examination - Mr Aamir But...

More

Graduate School

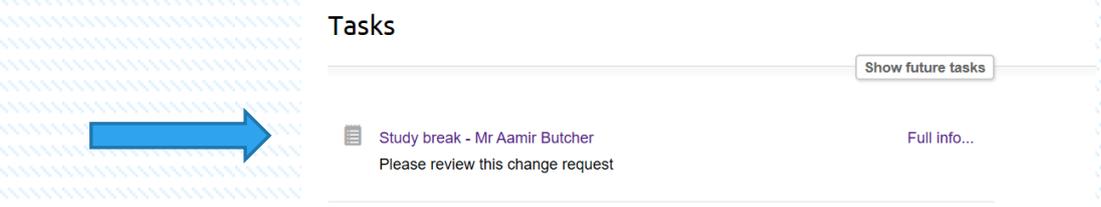
My record

My Students



- Select the Tasks button to view the task request. Once selected it shows an outstanding task for a Study break – student name.
- Select the Study break as shown

Fig 25



Tasks Show future tasks

 Study break - Mr Aamir Butcher
Please review this change request Full info...

Study break - Mr Aamir Butcher 

 Study break	
Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

Tasks

-  Study break
Waiting for ARC Coordinator to review

STATUS
Waiting for ARC Coordinator to review

CURRENTLY WITH
Jeanie Hudson

- Submit endorsement
- Return to supervisor

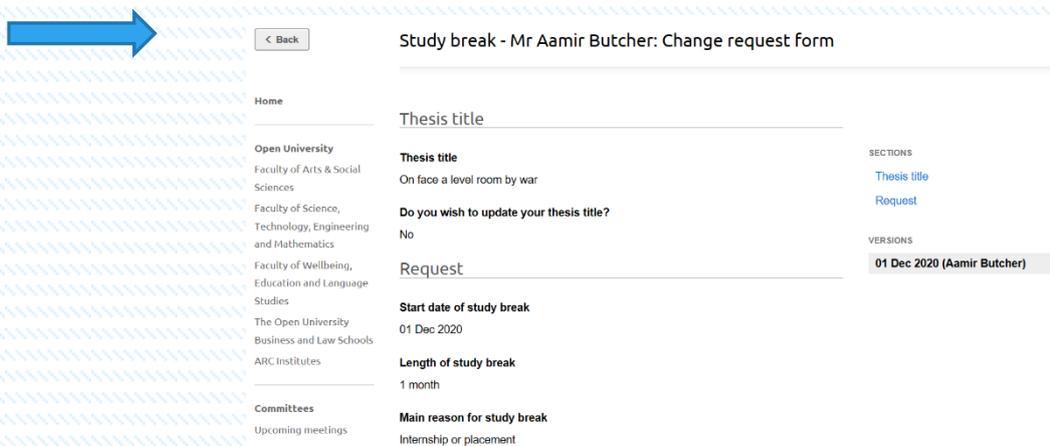
APPLICATION
Change request form

ASSESSMENT
Supervisor form

To review the change request, select change request form here

- As with the supervisor approval the process is the same in selecting the Application field, Change request form to review as shown.

Fig 26



< Back Study break - Mr Aamir Butcher: Change request form

Home

Open University

Faculty of Arts & Social Sciences

Faculty of Science, Technology, Engineering and Mathematics

Faculty of Wellbeing, Education and Language Studies

The Open University Business and Law Schools

ARC Institutes

Committees

Upcoming meetings

Thesis title

Thesis title
On face a level room by war

Do you wish to update your thesis title?
No

Request

Start date of study break
01 Dec 2020

Length of study break
1 month

Main reason for study break
Internship or placement

SECTIONS

[Thesis title](#)

[Request](#)

VERSIONS

01 Dec 2020 (Aamir Butcher)

- Again as in the previous approval review the request and once that you are happy with the content select the back arrow as shown above to return to the main screen where you are presented with the green submit endorsement button.

Fig 27

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

STATUS
Waiting for ARC Coordinator to review

CURRENTLY WITH
Jeanie Hudson

Submit endorsement

Return to supervisor

APPLICATION
Change request form

- Once submitted the request. You the ARC Coordinator are presented with an Edit ARC Coordinator for: Study Break – student name screen.

Fig 28

Edit ARC Coordinator form: Study break - Mr Aamir Butcher

I endorse this request

I do not endorse this request

Notes

- Select the I endorse this request or I do not endorse this request and add notes as appropriate. Not forgetting to Save and continue.
- If I do not endorse this request is selected this form is sent back to the previous endorser for their amendments and all processes from the approver perspective are to be repeated.
- To complete the task check the information provided and select the green Continue button as indicated below on the Review: Study break screen

Fig 29

Review: Study break - Mr Aamir Butcher

Review Confirm

Please review the information below before continuing.

Continue

Change request form

Change request form
Supervisor form
ARC Coordinator form

Thesis title

Thesis title
On face a level room by war

Do you wish to update your thesis title?
No

Request

Start date of study break
01 Dec 2020

Length of study break
1 month

Main reason for study break

- Once confirmed complete the process by selecting the Confirm: Progress button and adding any notes as appropriate.

Fig 30

Progress: Study break - Mr Aamir Butcher

Review Confirm

You have chosen to progress the application to the next stage

Confirm: Progress Cancel

Notes (Notes can be seen by the student and all staff reviewing this application)

Both Directly Support and Affiliated Research Centres

- The request is then passed to the Research Degrees Team for their review and comments.

Fig 31

Study break - Mr Aamir Butcher

Study break

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

Tasks

- Study break
Waiting for Research Degrees Team to review

STATUS
Waiting for Research Degrees Team to review

CURRENTLY WITH
Research Degrees Team

APPLICATION
Change request form

ASSESSMENT
Supervisor form
ARC Coordinator form

Download printable PDF...

Affiliated Research Centres ONLY

- The next step for ARC's is for the ARC Management Group to approve the request. The Research Degrees Team review this request and assign the Chair or Deputy Chair of the ARCMG group to review the request.

Fig 32

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

STATUS
Waiting for ARCMG Chair to review

CURRENTLY WITH
Avrom Turnbull

APPLICATION
Change request form

ASSESSMENT
Supervisor form
ARC Coordinator form

- Once the selection is made this approval is moved onto the ARCMG level for approval.
- As in all tasks the task bar will show the outstanding tasks for review.

Fig 33

Tasks

Show future tasks

Study break - Mr Aamir Butcher
Please review this change request
Full info...

- As in previous approvals to view the form select the Application field and Change request form to view the completed request.

Fig 34

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

STATUS
Waiting for ARCMG Chair to review

CURRENTLY WITH
Avrom Turnbull

Delegate this task

Submit recommendation

Return to ARC Coordinator

APPLICATION
Change request form

- Once the review of the form has taken place and the approver is happy to endorse select the green submit button.

Fig 35

Edit ARCMG Chair form: Study break - Mr Aamir Butcher

Recommended

Not recommended because

Approved

Save and continue Save for later

- Once recommended don't forget to Save and continue.
- Check that all the information is correct and select the green Continue button

Fig 36

Review: Study break - Mr Aamir Butcher

Review Confirm

Please review the information below before continuing.

Continue

Confirm approver

Select approver

Choose approver
ARCMG Chair

Confirm approver
Change request form
Supervisor form
ARC Coordinator form
Research Degrees Team form
ARCMG Chair form

- To complete the task select the Confirm and Progress button and adding any information as required.

Fig 37



Progress: Study break - Mr Aamir Butcher

Review Confirm

You have chosen to progress the application to the next stage

Confirm:

Notes (Notes can be seen by the student and all staff reviewing this application)

Directly supported and Affiliated Reserch Students

- So far, the student has submitted their study break, it has been approved by the supervisor, been sent to the DAD for directly supported students ARC Coordinator (if ARC) then to the ARCMG (if ARC). Then all were sent to the Research Degrees Team for comments.
- In the case of a Study break the last approver is the Graduate School Director.
- The Graduate School Director as in the case of all approvers, will be sent an email advice of an outstanding task. As in previous approvals the Task bar is opened to see what tasks are outstanding.

Fig 38

Tasks

Show future tasks

- [Outstanding updates to complete](#) Full info...
47 updates to complete.
- [Conferment: Examination - Taber Jennings](#) Full info...
Waiting for confirmations of award & receipt by the Research Degrees Team
- [Progress review - Becka Begum](#) Full info...
Please select users responsible for ARCMG roles at this workflow
- [Thesis amendments: Examination - Ms Nollie Wells](#) Full info...
Waiting for confirmation by the Research Degrees Team
- [Post-examination: Examination - Mr Aamir Butcher](#) Full info...
Please provide the requested information
- [Progress review - Ms Amabel Collier](#) Full info...
Please select users responsible for ARCMG roles at this workflow
- [Study break - Mr Aamir Butcher](#) Full info...
Please review this change request



- As you can see there are outstanding tasks awaiting approval from the Graduate School; Director. We are looking for a Study break for Amir Butcher shown at the bottom of the screen.
- Select this Study Break which opens up the view for the student in question.

Fig 39

Study break - Mr Aamir Butcher

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021

Tasks

- Study break
- Waiting for Graduate School Director to review**
- Aamir Butcher started the process
- Aamir Butcher submitted the request 01 Dec 2020, 12:06
- Tamarra Giles delegated the task to Fred Peters 22 Feb 2021, 15:02
- Tamarra Giles took the task over from Fred Peters 22 Feb 2021, 15:05
- Tamarra Giles delegated the task to Duffy Warren 22 Feb 2021, 15:05
- Tamarra Giles took the task over from Duffy Warren 22 Feb 2021, 15:09
- Tamarra Giles progressed the request 22 Feb 2021, 15:25
- Jeanie Hudson progressed the request 22 Feb 2021, 15:51
- Barb Owens added a note: Approved by Research Degrees Team 22 Feb 2021, 15:54
- Barb Owens progressed the request 22 Feb 2021, 15:54
- Barb Owens confirmed the request 22 Feb 2021, 15:58

STATUS
Waiting for Graduate School Director to review

CURRENTLY WITH
Sashenka Sharp

- Delegate this task
- Progress
- Return to submitter
- Return to supervisor
- Return to ARC Coordinator
- Return to Research Degrees Team
- Return to ARCMG Chair

APPLICATION
Change request form

ASSESSMENT
Supervisor form
ARC Coordinator form
Research Degrees Team form
ARCMG Chair form

Download printable PDF...
Add note

Tasks here show the student journey for the current request, the approvers and who the request is currently with.

- Noted on this screen the Graduate School Director (GSD) has the option of delegating the task, progressing, return to submitter, return to supervisor, return to ARC Coordinator etc. If the return to options are selected then the process from that point is to be actioned. Also to note on this screen that all actions so far for the student are listed.
- In this instance we are going to Progress this application by selecting the green button Progress as indicated by the blue arrow above.

Fig 40

Edit Graduate School Director form: Study break - Mr Aamir Butcher



Authorised
 Not authorised because

- The GSD can then select to authorise or not authorise the request as appropriate or refer back for amendments.
- Save and continue.
- Once approved the GSD is presented with a Study Break dates screen which allows the GSD to add new dates for study. This includes Start date of the study break, the length of the study break and the expected date of return to study. This is confirmed
- Noting that study breaks can be made during mid month.
- And the main screen shows the authorised STATUS of the request and updated on the students project.

Fig 41

Study break - Mr Aamir Butcher Edit 📄

Study break

Title	Study break - Mr Aamir Butcher
Date	01 Dec 2020
Project	On face a level room by war
Student	Mr Aamir Butcher
Visa type	Tier 4 Student
Supervisor	Prof Tamarra Giles Dr Duffy Warren Dr Tami Rahman
Academic year	2020 - 2021
Absence dates	01 Dec 2020 to end of 01 Jan 2021

Tasks

Study break	
Aamir Butcher started the process	01 Dec 2020, 12:04
Aamir Butcher submitted the request	01 Dec 2020, 12:06
Tamarra Giles delegated the task to Fred Peters	22 Feb 2021, 15:02
Tamarra Giles took the task over from Fred Peters	22 Feb 2021, 15:05
Tamarra Giles delegated the task to Duffy Warren	22 Feb 2021, 15:05

STATUS
Authorised

APPLICATION
Change request form

ASSESSMENT
Supervisor form
ARC Coordinator form
Research Degrees Team form
ARCMG Chair form
Graduate School Director form

Download printable PDF...

SUPPORT TOOLS
Move back...

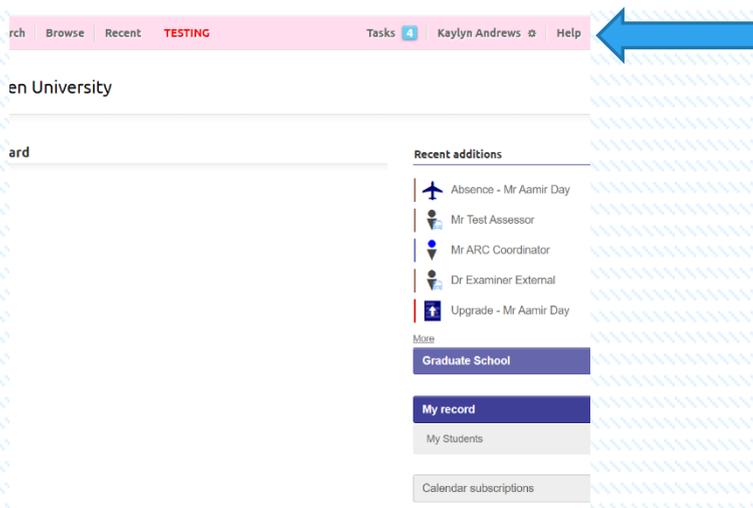


- If the Graduate School Director sends the request back to the supervisor or student the student/supervisor will see the change request back in their queue informing them of changes required. The process of sumitting the change request again follows the same route as before.
- All change requests work in the same way and follow the same routes. At each level of authorisation and email is sent to the student/supervisor/approver to indicate a task is awaiting action. Also noting that the students profile is updated with the task showing its status.

Absences

- If you have a student who has is a Student Route Visa Holder (previously known as Tier 4 student) there is an absence function on the main page which the student will be able to complete. Once the student has completed this task you will be advised by email notification and a task will appear in your outstanding task bar.

Fig 42



- Once you have opened your profile you will be presented with any outstanding actions/tasks as seen above . Open the appropriate task; in this case the Absence request for Aamir Day.

Fig 43

Search | Browse | Recent | TESTING | Tasks 4 | Kaylyn Andrews | Help

Absence - Mr Aamir Day

STATUS
Waiting for Supervisor

CURRENTLY WITH
Kaylyn Andrews

- Review request
- Return request to Student
- Not approve absence request

FORMS
Absence

Add note

Title	Absence - Mr Aamir Day		
Student	Mr Aamir Day		
Project	Others the friend of by		
Date	09 Mar 2021		
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson		
Academic year	2020 - 2021		

Absence
Waiting for Supervisor

Aamir Day started the workflow	09 Mar 2021, 10:29
Aamir Day confirmed details	09 Mar 2021, 10:29
Aamir Day submitted an absence request	09 Mar 2021, 10:29

- As in previous change requests you will be presented with a Status table showing who the task is currently with and the actions available as an approver. In this case we want to review the request so select the green button Review request. Once selected you will be able to view the request made by the student.
- Fig 44

Review: Absence - Mr Aamir Day

Review | Confirm

Please review the information below before continuing. Continue

Student absence form

Reason for absence
Annual leave

Start
24 Mar 2021

End
31 Mar 2021

Will you be travelling to a different country during your leave?
No

Student contact details whilst absent

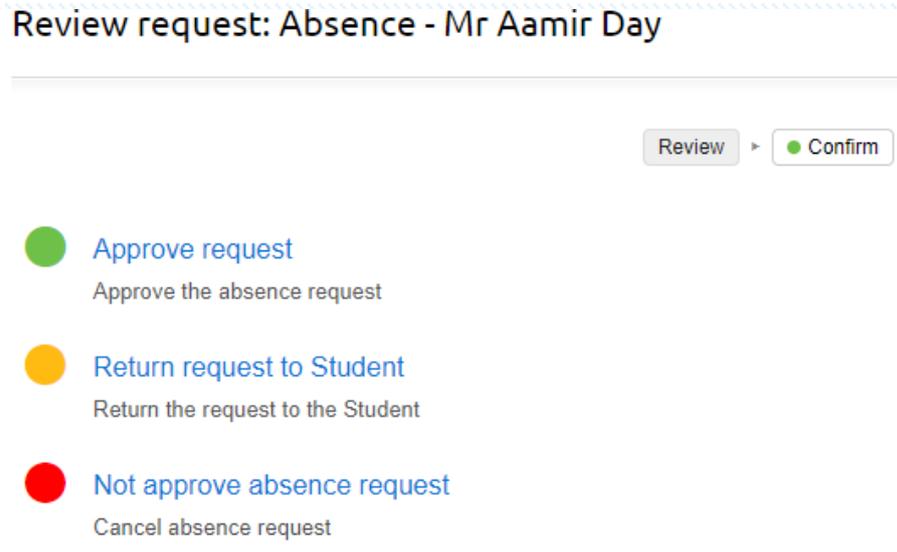
Method of maintaining contact with supervisory team whilst absent
email and skype

Address
dddd

Telephone number
334343

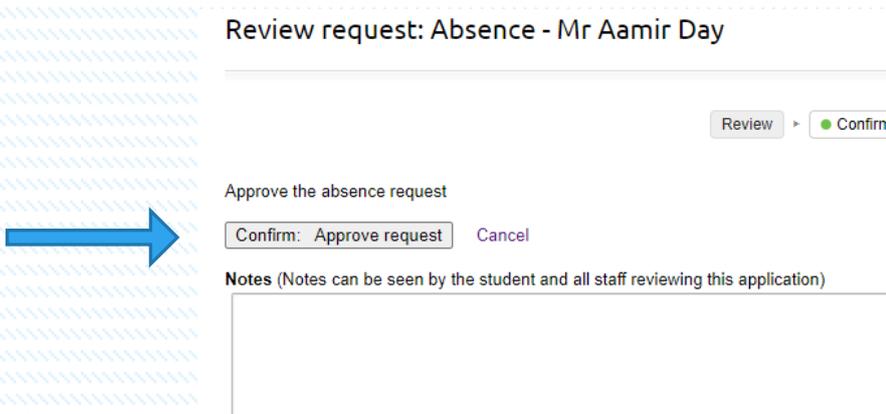
- Select the green button Continue to access the approval screen. You can then select the appropriate decision screen as indicated below.

Fig 45



- Once approved select the confirm approve request or other option as appropriate.

Fig 46



- Once confirmed the STATUS changes to Approved or not approved depending on decision made.

Fig 47

Absence - Mr Aamir Day

Title	Absence - Mr Aamir Day
Student	Mr Aamir Day
Project	Others the friend of by
Date	09 Mar 2021
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Academic year	2020 - 2021
Absence dates	24 Feb 2021 to 24 Mar 2021

STATUS
Approved

FORMS
Absence

● Cancel absence request

- Once again the approver can reject the request and refer it back to the student for amendments. I can also be cancelled as necessary.

Upgrade

- All students are required to complete the upgrade process before their 1st anniversary. Once the student has completed the Upgrade process as in all requests you (the supervisor) will be emailed advising you that there is a task for processing.
- Go to your task bar as before and select the appropriate task, in this case the Upgrade for the student in question.

Fig 48

Upgrade - Mr Aamir Day

Title	Upgrade - Mr Aamir Day
Student	Mr Aamir Day
Project	Others the friend of by
Date	12 Feb 2021
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Academic year	2020 - 2021
Student Project Type	MPhil

STATUS
Waiting for supervisor

CURRENTLY WITH
Kaylyn Andrews

Delegate this task

Edit supervisor form

Return to Student

APPLICATION
Student form

Download printable PDF...

Add note

Tasks

Upgrade	Waiting for supervisor
Aamir Day confirmed details	12 Feb 2021, 16:50
Aamir Day submitted the application	12 Feb 2021, 17:00

This window shows status of request and who the request is currently with.,

This window shows the request being made and what date is was submitted.

- Once selected you are presented with an Upgrade overview screen of the student you have selected. To view the request select the green button Edit supervisor form on the right hand side of the screen as indicated above.
- As the supervisor you are then presented with 2 tabs which need to be completed. You are asked to complete these fields to confirm your student's profile.
- All fields are required to be completed.

Fig 49

Progress
Ethics

Has the student achieved the upgrade benchmarks?

Yes

No

Has the student achieved satisfactory academic progress? *

Yes - recommend to register for PhD

No - recommend revisions

No - de-registration recommended

If you are recommending revisions or de-registration, please detail the issues

Please give an evaluative commentary and any feedback about the upgrade period and overall achievements / areas for development. *

If de-registration is recommended, have procedures for addressing failure to make satisfactory academic progress been followed as per Research Degree Regulations?

Yes

No

Have the mandatory training courses been completed? *

E.g. GDPR and Prevent

Yes

No

Save and continue

Save for later

Progress
Ethics



- Once all fields are completed don't forget to Save and continue before moving to the Ethics tab.

Fig 50

Progress **Ethics**

Has the need for ethical review been discussed with the student? *

Yes
 No

If no, please describe specific steps for how and when this will be addressed

If yes, have the relevant bodies (e.g. HREC) been contacted to assess whether an ethics review is required?

Yes
 No

Please identify the relevant bodies from whom formal approval is required, such as HREC.

HREC

Is an ethics review required for the research? *

Yes
 No

If yes, has ethics approval been granted?

Yes
 No

Please provide HREC/AWERB reference number (UK), if allocated

HREC 22222

If yes, please upload a copy of the ethics approval

↑ Drag files here or [choose file...](#)

Test test test.docx ✕

Save and continue

Save for later

Progress **Ethics**



- Once you have completed all the fields and uploaded any relevant documentation as requested you can Save and continue.
- As before in other requests you will be able to view the screen, Once you are happy with the information select the green Continue button to confirm action.

Fig 51

Progress: Upgrade - Mr Aamir Day



Review ▶ Confirm

You have chosen to progress the application.

Confirm:

Notes (Notes can be seen by the student and all staff reviewing this application)

- Confirm as appropriate and add any notes if required noting that the student can see the notes entered here.

Fig 52

Confirm project details

Please confirm the details, as shown below, are correct.

Student	Mr Aamir Day
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Research institute	Stowers Institute for Medical Research
Project mode	Full Time
Student Project Type	MPhil

	Date completed	Deadline	Reminder sent
Project start	10 Aug 2015		
Project end	23 Aug 2018		

- You are now in the Upgrade process. Please complete all tabs shown here remembering to Save and continue at each stage. Noting that in the Absences and Project report tab that there is a required Upload file field required. If the information is sensitive and or confidential you can send this directly to the Research Degrees Team in confidence. This will not be shared with any parties.

Fig 53

Edit Student form: Upgrade - Mr Aamir Day

Thesis title Absences Project report Progress Objectives

Thesis title
Others the friend of by

Do you wish to update your thesis title? *

Yes
 No

Save and continue Save for later

Thesis title Absences Project report Progress Objectives

Fig 54

Edit Student form: Upgrade - Mr Aamir Day

Thesis title Absences **Project report** Progress Objectives

Please complete all the required fields.

Please upload your project report *
If your evidence is sensitive this can be submitted directly to the Research Degrees Team not uploaded here.

Drag files here or [choose file...](#)

test.docx X

Not enough entries, 1 required

The project report is attached.

Save and continue Save for later

Thesis title Absences **Project report** Progress Objectives

- Do not forget to Save and continue to move to the next tab.
- You will be presented with a Progress tab. Please include your supervision meetings here and entering your training events etc as indicated in the fields. All fields are required to be completed. Last but not least you will be required to complete the Objective fields. Once again these fields are all required to be completed. Once completed you can check your entries, once you are happy that all fields are completed to your satisfaction press the continue button. Then click the Confirm and Submit button and add any notes as required.
- Once again after completing the process you are presented with a summary screen indicating the status of the request and who it is currently with. As in all requests you will receive an email confirmation regarding your request and your approver (in this case your supervisor) will also receive an email advising them that they have an outstanding action. You as the student can also check this status by viewing the main student page as per below.

Fig 55

Upgrade - Mr Aamir Day



Title	Upgrade - Mr Aamir Day
Student	Mr Aamir Day
Project	Others the friend of by
Date	12 Feb 2021
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Academic year	2020 - 2021
Student Project Type	MPhil

STATUS
Waiting for supervisor

CURRENTLY WITH
Kaylyn Andrews

APPLICATION
Student form

Download printable PDF...

Add note

Tasks

Upgrade	
Waiting for supervisor	
<i>Aamir Day confirmed details</i>	12 Feb 2021, 16:50
<i>Aamir Day submitted the application</i>	12 Feb 2021, 17:00

- The Admin teams within the faculties appoint the accessors for the mini viva as follows:
- Following an email advising the Administrators in the faculties that there is an outstanding task for them to complete. They can review this task by selecting the task bar in PINK at the top of the screen.

Fig 56

Search | Browse | Recent | **TESTING** | Tasks 1 | Sam Townsend

Upgrade - Mr Aamir Day

Title	Upgrade - Mr Aamir Day
Student	Mr Aamir Day
Project	Others the friend of by
Date	12 Feb 2021
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Academic year	2020 - 2021
Student Project Type	MPhil

STATUS
Waiting for appointment of assessors

CURRENTLY WITH
Sam Townsend

Delegate this task

Appoint assessors

APPLICATION
Student form

ASSESSMENT
Supervisor form

Download printable PDF...

Add note

Tasks

Upgrade	
Waiting for appointment of assessors	
<i>Aamir Day confirmed details</i>	12 Feb 2021, 16:50
<i>Aamir Day submitted the application</i>	12 Feb 2021, 17:00
<i>Kaylyn Andrews progressed the application</i>	09 Mar 2021, 16:43

- Once reviewed they can appoint the assessors by selecting the Green Appoint assessors button on the right-hand side of the screen as shown above.

Fig 57

- Add in the assessors details if not pre populated a manual entry can be made. You can also add another assessor by selecting the Add another button shown by the blue arrow. There are 2 entries required here then save and continue.
- You are then prompted by a Regulation screen which asks you to confirm that you have read the regulations and that you can confirm that the application does not have any conflicts of interest associated with the application.
- Once confirmed save and continued as before.

Fig 58

Fig 59

- Check the information you have provided is correct and continue

Progress: Upgrade - Mr Aamir Day

Review Confirm

You have chosen to confirm appointment of upgrade assessors.

Confirm: Confirm assessors Cancel

Notes (Notes can be seen by the student and all staff reviewing this application)

- Confirm: Confirm assessors selection.
- This is On hold until the viva date is confirmed. Once the viva dates has been agreed, select the Green button Edit viva date and add the date of the mini viva.

Fig 60

Upgrade - Mr Aamir Day

Title	Upgrade - Mr Aamir Day
Student	Mr Aamir Day
Project	Others the friend of by
Date	12 Feb 2021
Supervisor	Prof Kaylyn Andrews Dr Sabrina Cole Prof Danell Riley Prof Georg Anderson
Academic year	2020 - 2021
Student Project Type	MPhil
Assessor	Prof Devora Abbott Dr Stace Abbott

Tasks

Upgrade	
Waiting for viva date	
Aamir Day confirmed details	12 Feb 2021, 16:50
Aamir Day submitted the application	12 Feb 2021, 17:00
Kaylyn Andrews progressed the application	09 Mar 2021, 16:43
Sam Townsend confirmed the appointed assessors	22 Mar 2021, 17:42

STATUS
Waiting for viva date

CURRENTLY WITH
On hold

Edit viva date

Appoint assessors

APPLICATION
Student form

ASSESSMENT
Supervisor form

Appoint Assessors

Download printable PDF...

Add note

Fig 61

Edit Mini viva: Upgrade - Mr Aamir Day

Mini viva date *

22 Mar 2021

Save and continue Save for later

- Enter the mini viva date here then Save and continue.
- Once this is completed all of the assessors post viva are required to submit a report. An email is sent to all assessors for the reports.

Fig 62

Viva scheduling: Examination - Abby Norman

Title	Examination - Abby Norman
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Project	By issue business moment study food lot by
Chair	Prof Devora Abbott
Examiner	Internal Dr Ephrem Barber External Dr External Examiner
Date	17 Feb 2021
Observer	Dr Teodor Holland
Academic year	2020 - 2021

- Barb Owens started the workflow 22 Mar 2021, 14:48
- System automatically sent workflow to updated user 22 Mar 2021, 16:54
- Devora Abbott scheduled the Viva 22 Mar 2021, 17:09
- Barb Owens confirmed catering has been ordered 22 Mar 2021, 17:10

STATUS
Waiting for Viva to occur

CURRENTLY WITH
Devora Abbott

Delegate this task

Confirm Viva occurred

Reschedule viva

APPLICATION

APPLICATION
Viva and catering details

ASSESSMENT

ASSESSMENT
Catering confirmation

Add note



- Once the mini viva has taken place the green Confirm Viva occurred button can be selected as above.
- The confirmation is just a confirmation screen which requires selecting and adding notes if required.

Fig 63

Progress: Viva scheduling: Examination - Abby Norman

You are confirming that the viva took place, and closing the viva arrangements workflow.

Confirm:

Notes (Notes can be seen by the student and all staff reviewing this application)

- For more details regarding the Administration role for the Upgrade process please review the PGR Manager Faculty Administrator Guide available on the GSN and Microsoft site.

Re-Registration

- All students are required to complete the Re-Registration process. This is done through the PGR Manager system, once the student has completed their Re-registration you as the DRD/DAD will be emailed with a task for actioning.
- Open the task in the usual way. Where you will see the outstanding task ready for your action and comments.

Fig 64

Re-registration - Abby Norman

Title	Re-registration - Abby Norman
Student	Abby Norman
Project	By issue business moment study food lot by
Date	18 Feb 2021
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Academic year	2020 - 2021

Tasks

Re-registration
Waiting for DRD/DAD

Abby Norman confirmed details	18 Feb 2021, 13:16
Abby Norman submitted the application	22 Mar 2021, 14:49

STATUS
Waiting for DRD/DAD

CURRENTLY WITH
Arel Lambert

- Progress application
- Return to Student

APPLICATION
Student form

Download printable PDF...

Add note

- To view the re-registration request, select the green Progress application button on the right-hand of the screen as show above.

Fig 65



- Please complete all fields not forgetting the Save and continue once done.

Fig 66



Progress: Re-registration - Abby Norman

You have chosen to progress the application.

Confirm: [Progress](#) [Cancel](#)

Notes (Notes can be seen by the student and all staff reviewing this application)

- Once completed Confirm: Progress the re-registration.
- Once completed the request moves onto the Research Degrees Team for their comments and approval. Once this has been confirmed by the Research Degrees Team the student will notice the STATUS and Approved on their My project view and giving reminder date for the next re-registration reminder.

Fig 67

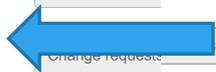
By issue business moment study food lot by



Title	By issue business moment study food lot by
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Student Project Status	Active
Project mode	Full Time
Student Project Type	PhD
Student Project Stage	Submitted

	Date completed	Deadline	Reminder sent
Project start	27 Sep 2019		
Progress review		20 Apr 2021	23 Feb 2021
Re-registration		13 Sep 2020	13 Aug 2020
Project end		18 Feb 2021	

- Project history
- Project dates
- Supervision meetings
- Induction
- Progress review
- Re-registration
- Examination
- Change requests
- Absence



Examinations

Fig 68

The screenshot shows the Haplo system interface for 'Impersonating Abby Norman'. The top navigation bar includes 'Search', 'Browse', 'Recent', 'TESTING', 'Tasks 2', 'Abby Norman', and 'Help'. The main content area is titled 'Examination - Abby Norman' and contains a table with the following details:

Title	Examination - Abby Norman
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Project	By issue business moment study food lot by
Date	17 Feb 2021
Academic year	2020 - 2021

Below the table is a 'Tasks' section with a list of activities:

- Examination record**
 - Abby Norman started the workflow (17 Feb 2021, 17:07)
- Notice to submit**
 - Abby Norman started the workflow (17 Feb 2021, 17:07)
 - Abby Norman submitted notice (18 Feb 2021, 08:53)
 - Teodor Holland added a note: Please amend the statement field. (18 Feb 2021, 08:59)
- Exam panel nomination**
 - Teodor Holland started the workflow (18 Feb 2021, 08:59)
- Thesis submission**
 - Teodor Holland started the workflow (18 Feb 2021, 08:59)
- Notice to submit**
 - Teodor Holland confirmed notice (18 Feb 2021, 08:59)
- Thesis submission**

On the right side, there is a 'STATUS' section showing 'Pre-examination'. Below it are sections for 'Notice to submit' (Received), 'Exam panel nomination' (In progress), and 'Thesis submission' (In progress). A blue arrow points to the 'STATUS' section.

- The view above shows the students submission of the thesis and shows with whom the task is now with, also noted on this screen is the STATUS is Pre-examination. The tasks listing shows all information and actions to date and where the examination is in the process.
- The next stage is for the supervisor to review the task and approve. An email alert is sent to the supervisor indicating that there is a task awaiting action.

Fig 69

The screenshot shows the Haplo system navigation bar. A blue arrow points to the 'Browse' button. The navigation bar includes 'Browse', 'Recent', 'TESTING', 'Tasks 2', 'Teodor Holland', and 'Help'. Below the navigation bar is a section titled 'Recent additions'.

- Select the task bar and select the outstanding task for the student in question.

Fig 70

Search | Browse | Recent | TESTING | Tasks 2 | Teodor Holland | Help

Submission: Examination - Abby Norman

Submission	Examination - Abby Norman
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Due date	By issue business moment study food lot by 17 Feb 2021
Academic year	2020 - 2021

Teodor Holland started the workflow	18 Feb 2021, 08:59
Abby Norman submitted their thesis	18 Feb 2021, 10:37

STATUS
Awaiting supervisor declaration form

CURRENTLY WITH
Teodor Holland

Edit supervisors' candidate declaration

Return to student

APPLICATION
Student form

- You as the supervisor will notice that the STATUS is awaiting supervisor declaration form.
- It also states who the current task is with.
- To edit the supervisor's candidate declaration form, select the green button shown above.

Fig 71

Edit Supervisors' candidate declaration: Thesis submission: Examination - Abby Norman

Supervisor
Dr Teodor Holland

Is the length of the thesis as stated by the student correct? *

Yes

No

If no, please give details

Please comment on any statements made by the student or any other issues you wish to raise.

Support for submission *

I support this submission for examination.

I do not support this submission for examination.

Notes

- The supervisor is then required to complete all fields not forgetting to Save and continue once completed.
- Once completed and saved you will be prompted to check your details and continue by selecting the green button.

Fig 72

Review: Thesis submission: Examination - Abby Norman

Review
 Confirm

Please review the information below before continuing.

Continue

Student form

Supervisors' candidate declaration

Thesis

Thesis title
By issue business moment study food lot by

Do you wish to update your thesis title?
No

Please upload your thesis.

[Test test test.docx](#)

Details

Length of thesis / portfolio of work
Number of words 10,000

Where the thesis length exceeds the permitted word count, please confirm that permission to submit an over length thesis has been granted by the Research Degrees Committee.
Not applicable

If no, please explain why your thesis is overlength.

Have any other individuals contributed to your research?
No

If yes, please provide details

Have any parts of your thesis / dissertation been published?
No



- Once completed you will be presented with a Progress: Thesis submission screen, where once happy with your selection you can Confirm: Submit declaration. You can add notes at this point bearing in mind that they can be seen by the student.

Fig 73

Search | Browse | Recent | TESTING | Task

Progress: Thesis submission: Examination - Abby Norman

Review
 Confirm

You have chosen to submit your candidate declaration form.

Notes (Notes can be seen by the student and all staff reviewing this application)



- Once completed you will notice that the Status bar advises you that it is awaiting a supervisor declaration form. All supervisors that are assigned to the student are required to complete this form and will not move on to the next step until all supervisors supply the form following the steps just covered above.
- Once all supervisors have completed the declaration forms the system prompts the action of the RDT/ARC Coordinator for their review.

[Affiliated Research Centres Only](#)

Fig 74

- As an ARC coordinator you can view this task by selecting the Green review/edit RDT/ARC coordinator review button as indicated above.
- You are then prompted to confirm the process has been completed and that all regulations have been followed on completion of the form.

Fig 75

- Once the student has completed the Notice of Submission and all the supervisors assigned to the student have also submitted their declarations the student's Examination Panel are to be selected. The selection to start the process is made from the task made in the email alert notification.

Fig 76

The screenshot shows a task page for 'Examination - Abby Norman'. The left sidebar contains a 'Tasks' section with a list of activities:

- Examination record**
 - Abby Norman started the workflow (17 Feb 2021, 17:07)
- Notice to submit**
 - Abby Norman started the workflow (17 Feb 2021, 17:07)
 - Abby Norman submitted notice (18 Feb 2021, 08:53)
 - Teodor Holland added a note: Please amend the statement field. (18 Feb 2021, 08:59)
- Exam panel nomination**
 - Teodor Holland started the workflow (18 Feb 2021, 08:59)
- Thesis submission**
 - Teodor Holland started the workflow (18 Feb 2021, 08:59)
- Notice to submit**
 - Teodor Holland confirmed notice (18 Feb 2021, 08:59)
- Thesis submission**

The right-hand summary section shows the following details:

- STATUS:** Pre-examination
- Notice to submit:** Received
- Exam panel nomination:** In progress. Waiting for the supervisor's exam panel nomination form. With: Teodor Holland. (A blue arrow points to this section.)
- Thesis submission:** Complete
- Viva scheduling:** In progress. Waiting for the Viva to be scheduled. With: Rene Cartwright.
- Buttons:** Add note

- Once selected you will be presented with the Exam Panel Nomination screen.
- At this point the task can be delegate to another member of the team by selecting Delegate this task or indeed can be taken over by any member of the team assigned to the student.

Fig 77

The screenshot shows the 'Exam panel nomination: Examination - Abby Norman' screen. The left-hand summary section shows the following details:

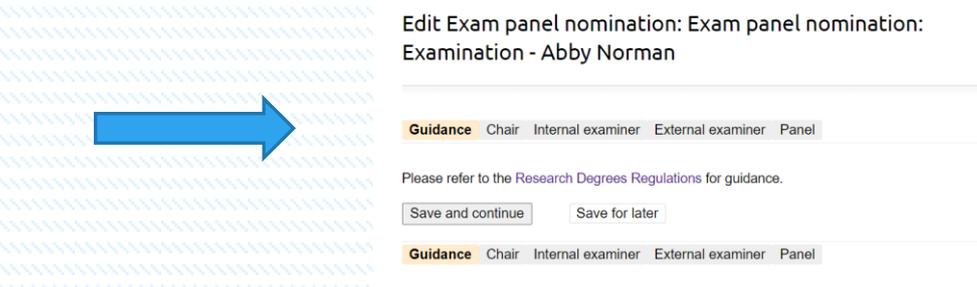
- Title:** Examination - Abby Norman
- Student:** Abby Norman
- Supervisor:** Dr Teodor Holland, Dr Arel Lambert, Dr Sher Carter
- Project:** By issue business moment study food lot by
- Date:** 17 Feb 2021
- Academic year:** 2020 - 2021
- Activity:** Teodor Holland started the workflow (18 Feb 2021, 08:59)

The right-hand summary section shows the following details:

- STATUS:** Waiting for the supervisor's exam panel nomination form
- CURRENTLY WITH:** Teodor Holland
- Buttons:** Delegate this task (highlighted with a blue arrow), Edit exam panel nomination, Add note

- To progress the task, select the Green Edit exam panel nomination button on the right-hand side as indicated above.

Fig 78



Edit Exam panel nomination: Exam panel nomination: Examination - Abby Norman

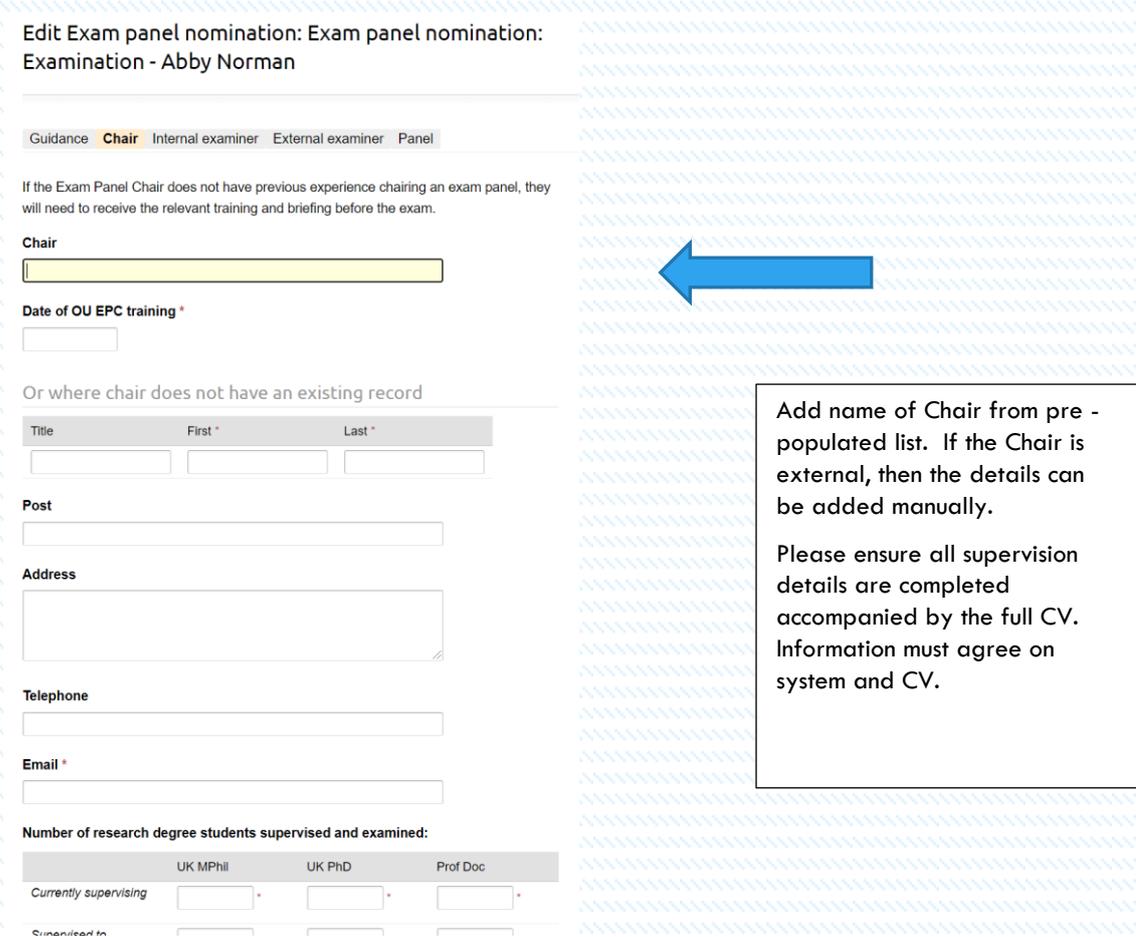
Guidance **Chair** Internal examiner External examiner Panel

Please refer to the [Research Degrees Regulations](#) for guidance.

Save and continue Save for later

Guidance Chair **Internal examiner** External examiner Panel

Fig 79



Edit Exam panel nomination: Exam panel nomination: Examination - Abby Norman

Guidance **Chair** Internal examiner External examiner Panel

If the Exam Panel Chair does not have previous experience chairing an exam panel, they will need to receive the relevant training and briefing before the exam.

Chair

Date of OU EPC training *

Or where chair does not have an existing record

Title	First *	Last *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Post

Address

Telephone

Email *

Number of research degree students supervised and examined:

	UK MPhil	UK PhD	Prof Doc
Currently supervising	<input type="text"/>	<input type="text"/>	<input type="text"/>
Supervised to	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add name of Chair from pre - populated list. If the Chair is external, then the details can be added manually.

Please ensure all supervision details are completed accompanied by the full CV. Information must agree on system and CV.

- The Internal Examiner tab asks for information regarding the internal examiner, supervisions, and completions. All details must be included as instructed on the form. Also required is the full CV which again, must tie up with the supervision experience. Upload CV here and save and continue to the next screen.
- The next screen is like the Internal Examiner. Complete all fields as required but must include the supervisory experience and full CV.
- The final tab asks for information on the panel. All fields are required. If when asked to supply information on the observer who are not on the system, there is a function that allows for manual entry on this tab. Complete as required.

Fig 80

Edit Exam panel nomination: Exam panel nomination: Examination - Abby Norman

Guidance Chair Internal examiner External examiner **Panel**

If the nominated panel does not have the required level of examination experience please provide a rationale for the appointment of the panel.

dddd

Conflict of interest

There are no conflicts of interest

There are potential conflicts of interest (please provide your assessment as to how this may affect the independence of the nominated panel.)

dddd

Remote participation *

All participants will be co-located throughout the examination.

A member of the panel wishes to participate in the examination remotely (please provide details of which panel member and the reason for the request.)

The candidate requests they be permitted to not be physically present at the viva (please provide reasons for the request.)

dddd

If the thesis has a non-book component, have the examiners been notified? *

Yes

No

Not applicable

Does the student wish for an observer to be present? *

Yes

- Once all tabs are completed select the Confirm: Submit form to confirm.

Fig 81

Progress: Exam panel nomination: Examination - Abby Norman

You have chosen to submit the exam panel nomination form.

Confirm:

Notes (Notes can be seen by the student and all staff reviewing this application)

- After confirming the Examination Panel, the DAD/DRD/ARC Coordinator are informed of an outstanding task by email.
- Select the task in the normal way by selecting the Tasks button at the top of the screen in the Pink area. Then select the action pending in this case the examination of student name.

Fig 82

Search | Browse | Recent | TESTING | Tasks 2 | Arel Lambert | Help

Exam panel nomination: Examination - Abby Norman

Student	Examination - Abby Norman	
Student	Abby Norman	
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter	
Due date	By issue business moment study food lot by 17 Feb 2021	
Academic year	2020 - 2021	
Activity	Teodor Holland started the workflow	18 Feb 2021, 08:59
Activity	Teodor Holland submitted the form	22 Mar 2021, 16:19

STATUS
Awaiting DAD/DRD/ARC coordinator approval

CURRENTLY WITH
Arel Lambert

-
-
-

APPLICATION
Exam panel nomination

- To action and progress the task select the Green Progress button on the right-hand side of the screen as indicated above.

Fig 83

Search Browse Recent TESTING Tasks 2 Arel Lambert

Review: Exam panel nomination: Examination - Abby Norman

Review Confirm

Please review the information below before continuing. Continue

Guidance

Please refer to the Research Degrees Regulations for guidance.

Chair

Chair

Prof Devora Abbott

Date of OU EPC training

15 Mar 2021

Number of research degree students supervised and examined:

	UK MPhil	UK PhD	Prof Doc
Currently supervising	2	2	1
Supervised to successful completion	2	2	1
Previously examined	2	2	1
Previous exam panel chair experience	1	1	1

Details of any non-UK research degree examination experience

fgfgf

Please note any potential conflicts of interest that should be brought to the attention of the Research Degrees Committee

fgfg

Please see the Guidelines which include a non-exhaustive list of potential conflicts

Full CV

Test test test.docx



- Once happy with the content select the Green continue button to progress

Fig 84

Progress: Exam panel nomination: Examination - Abby Norman

Review Confirm

I endorse the examination panel

You have chosen to progress the application.

Confirm: Progress Cancel

Notes (Notes can be seen by the student and all staff reviewing this application)



- To complete the process, select the I endorse the examination panel and Confirm: Progress.
- The next step of the process moves to the Research Degrees Team who confirm, right to work checks, and can return forms to the supervisor or DAD/DRD or ARC Coordinator as for amendments if required. The examination panel nomination then is passed to the Research Degrees Committee Chair for approval.
- After receiving an email advising RDC that there is a task for this student. It can be selected from the task bar at the top of the screen in PINK as before. The task in question can be selected from a drop-down list. In this case an examination panel nomination for student name.

Fig 85

The screenshot shows a web application interface for 'Exam panel nomination'. At the top, there is a navigation bar with 'Search', 'Browse', 'Recent', 'TESTING', 'Tasks 5', and 'Melodee Bull'. Below this, the title 'panel nomination: Examination - Abby Norman' is displayed. The main content area is divided into several sections:

- Examination - Abby Norman**: A header section with a link to 'Abby Norman'.
- Members**: A list of members including 'Dr Teodor Holland', 'Dr Arel Lambert', and 'Dr Sher Carter', with a link to 'By issue business moment study food lot by'.
- 17 Feb 2021**: A date section.
- year**: A dropdown menu showing '2020 - 2021'.
- Activity Log**: A table of activities with columns for user, action, and timestamp.

User	Action	Timestamp
Dr Teodor Holland	started the workflow	18 Feb 2021, 08:59
Dr Teodor Holland	submitted the form	22 Mar 2021, 16:19
Dr Arel Lambert	progressed the application	22 Mar 2021, 16:41
Dr Sher Carter	progressed the application	22 Mar 2021, 16:43
- STATUS**: A section with the text 'Awaiting Open University Research Degree Committee decision'.
- CURRENTLY WITH**: A section with the name 'Melodee Bull'.
- Actions**: A list of actions with colored circular icons: 'Edit research degrees committee decision' (green), 'Forward to RDC deputy chair' (yellow), 'Return to RDT' (yellow), 'Return to supervisor' (yellow), and 'Return to DAD/DRD/ARC coordinator' (yellow).
- APPLICATION**: A section with the text 'Exam panel nomination'.
- ASSESSMENT**: A section with the text 'Work rights'.
- Add note**: A button with a plus icon.

Blue arrows point to the 'Melodee Bull' name, the 'Edit research degrees committee decision' button, and the 'Exam panel nomination' text.

- At this point the RDC Chair can delegate this task to the Deputy Chair or the Deputy Chair can take over the task as required.
- RDC can view the form by selecting the Application Exam panel nomination as indicated by the blue arrow above.
- Once selected RDC Chair can review the information provided and make a decision on whether to approve or return to the supervisor/DAD etc for amendments. To return to the main screen the back arrow is selected at the top left-hand side of the screen.
- To Edit the proposal, select the Green Edit research degrees committee decision button on the right-hand side of the screen as indicated above.

Fig 86

Edit Research Degrees Committee decision: Exam panel nomination: Examination - Abby Norman

Authorised
 Not authorised

Notes

Save and continue Save for later

- RDC can now authorise or not authorise the request. Notes can also be added here for clarification or amendments as required. Save and continue
- Then select Confirm: Progress the application.

Fig 87

Exam panel nomination: Examination - Abby Norman

Title	Examination - Abby Norman
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Project	By issue business moment study food lot by
Chair	Prof Devora Abbott
Examiner	Internal Dr Ephrem Barber External Dr External Examiner
Date	17 Feb 2021
Observer	Dr Teodor Holland
Academic year	2020 - 2021

STATUS
Approved

APPLICATION
Exam panel nomination

ASSESSMENT
Work rights
Research Degrees Committee decision

Teodor Holland started the workflow	18 Feb 2021, 08:59
Teodor Holland submitted the form	22 Mar 2021, 16:19
Arel Lambert progressed the application	22 Mar 2021, 16:41
Barb Owens progressed the application	22 Mar 2021, 16:43
Melodee Bull progressed the application	22 Mar 2021, 16:54

- You will notice that the STATUS has now changed to Approved which means that the Examination Panel nomination has been accepted and approved. You will also notice here that the tasks listed at the bottom of the screen have been updated with information to the process during the examination selection and approvals.
- To complete the process the viva voce needs to be scheduled. This task is completed by the Chair who has been notified by email that there is a task awaiting action.
- The Chair can now select the student and begin adding the details of the viva.

Fig 88

Viva scheduling: Examination - Abby Norman

Title	Examination - Abby Norman
Student	Abby Norman
Supervisor	Dr Teodor Holland Dr Arel Lambert Dr Sher Carter
Project	By issue business moment study food lot by
Chair	Prof Devora Abbott
Examiner	Internal Dr Ephrem Barber External Dr External Examiner
Date	17 Feb 2021
Observer	Dr Teodor Holland
Academic year	2020 - 2021

STATUS
Waiting for the Viva to be scheduled

CURRENTLY WITH
Devora Abbott

Delegate this task

Schedule viva

Add note

Barb Owens started the workflow 22 Mar 2021, 14:48
System automatically sent workflow to updated user 22 Mar 2021, 16:54

- The Chair can delegate this task as in previous tasks. To schedule the viva the Green Schedule viva selection is made. Showing 5 tabs all, of which need to be completed.

Fig 89

Edit Viva and catering details: Viva scheduling: Examination - Abby Norman

Exam Examiner arrivals Catering Attendees Special arrangements

Date of exam *
22 Mar 2021

Time of exam
10:00

Exam takes place in Walton Hall, Milton Keynes

Room and building

Exam takes place off campus

Place of exam details
Online due to Covid

Save and continue Save for later

Exam Examiner arrivals Catering Attendees Special arrangements

- Once all fields are completed Save and continue and move to next tab. Examiner arrivals.

Fig 90

Edit Viva and catering details: Viva scheduling:
Examination - Abby Norman

Exam **Examiner arrivals** Catering Attendees Special arrangements

Name *
-- select --

Time of arrival *

To report to Berrill / Michael Young Reception or other location *

Collector name *

Collector extension/contact number *

Remove

Add another

Save and continue Save for later

Exam **Examiner arrivals** Catering Attendees Special arrangements

Fig 91

Edit Viva and catering details: Viva scheduling:
Examination - Abby Norman

Exam Examiner arrivals **Catering** Attendees Special arrangements

Alcohol will not be reimbursed by the Research Degrees Team.

Finger buffet at Walton Hall Campus required? *

Yes
 No

If yes, what time?

What room?

How many people?

Reservation in Mulberry Suite required? *

Yes
 No

If yes, what time?

How many people?

Lunch being taken elsewhere including at a Regional or Nations Office? (Exam panel chair to book) *

Yes
 No

If yes, what time?

- Once Saved and continued. The next tab is the catering requirements. Once completed you are presented with the Attendees tab.

Fig 92

Edit Viva and catering details: Viva scheduling:
Examination - Abby Norman

Exam Examiner arrivals Catering **Attendees** Special arrangements

The Research Degrees Team will pay for the examination panel to have a working lunch. The observer should not attend the pre-viva lunch but may attend the pre-viva meeting to answer any questions identified by the examiners. The observer must then leave the meeting until the examination begins. The observer should not be present for the post-viva discussion unless the panel unanimously requests their presence, but may attend the lunch once the outcome has been decided. The Research Degrees Team will not pay for the observer's lunch. Please see [Research Degrees Regulations](#) for further information.

Please confirm who will be attending lunch

Dr Ephrem Barber
 Dr External Examiner
 Prof Devora Abbott

Additional information

Exam Examiner arrivals Catering **Attendees** Special arrangements

- All attendees are listed here with any additional information added as required.
- Once completed save and continue.

Fig 93

Edit Viva and catering details: Viva scheduling:
Examination - Abby Norman

Exam Examiner arrivals Catering Attendees **Special arrangements**

Are there any special arrangements required? *

Yes
 No

The following special arrangements should be put in place

Video conference
 Telephone conference
 Other arrangements – please give details below
 Special arrangements for disability – please give details below

Further details

Have any special arrangements been approved by the Research Degrees Committee?

Yes
 No

Exam Examiner arrivals Catering Attendees **Special arrangements**

- The last tab is the special arrangements tab. Please complete as required.
- This completes the Examination scheduling ready for the viva.

For further information regarding Examinations processes post viva are available in the Examinations Guide available on the Graduate School Network and Microsoft Teams PGR Manager site.

Further Information can be found on the Graduate School Network.

<http://www.open.ac.uk/students/research/>

For any communication related to PGR Manager please email

pgrmanager@open.ac.uk