

# PGR Manager Supervisor and Approvers Guide

Directly Support and  
Affiliated Research Centres (ARCs)

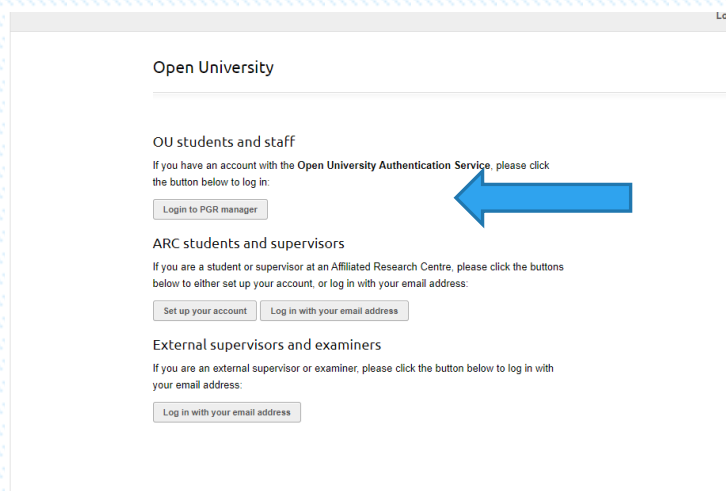
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# Logging in

- 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.



- 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](mailto: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

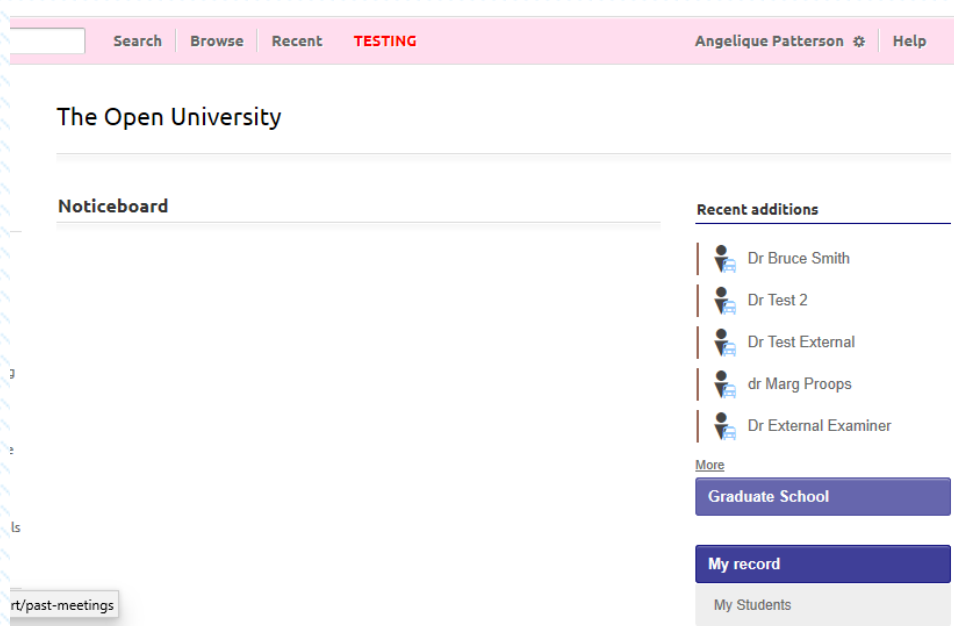


Fig 4

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5 Total 1 Complete 1 Withdrawn 1 Study break 2 Active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Mrs Wilhelmina Sykes	PhD	Supervisor	Part Time	2016	2019	Withdrawn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

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
<a href="#">Ms Dian Grant</a>	PhD	Supervisor	Part Time	2020	2028	Active
<a href="#">Mr Eddie Hooper</a>	PhD	Supervisor	Full Time	2020	2024	Active
<a href="#">Mr Laurie Black</a>	MPhil	Supervisor	Part Time	2016	2020	Complete
<a href="#">Mr Witty Chan</a>	PhD	Supervisor	Full Time	2020	2024	Study break
<a href="#">Mrs Wilhelmina Sykes</a>	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	<a href="#">Ms Dian Grant</a>
Supervisor	<a href="#">Prof Lyn Carter</a> <a href="#">Dr Angelique Patterson</a>
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

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

**STATUS**  
Waiting for Prof Lyn Carter to review the notes

**CURRENTLY WITH**  
Lyn Carter

Supervision notes

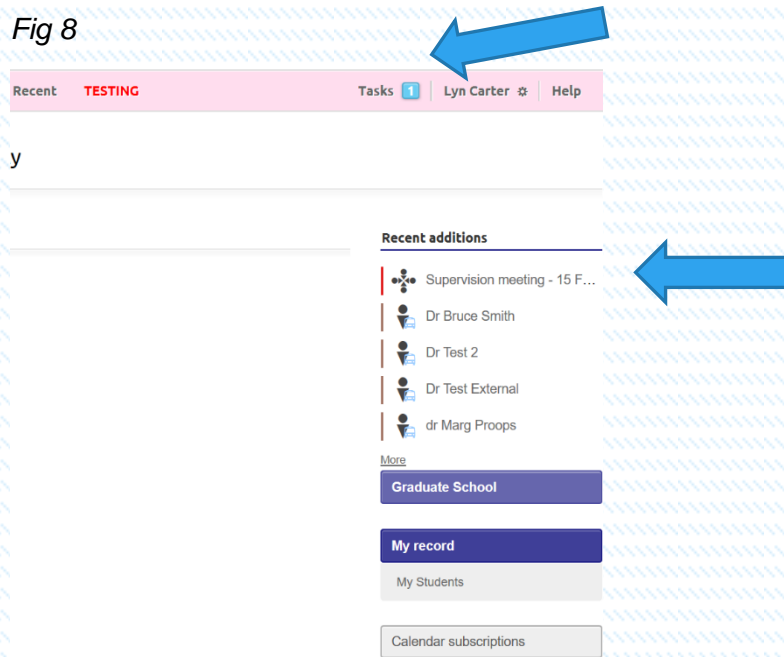
Meeting did not take place

Download printable PDF...

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

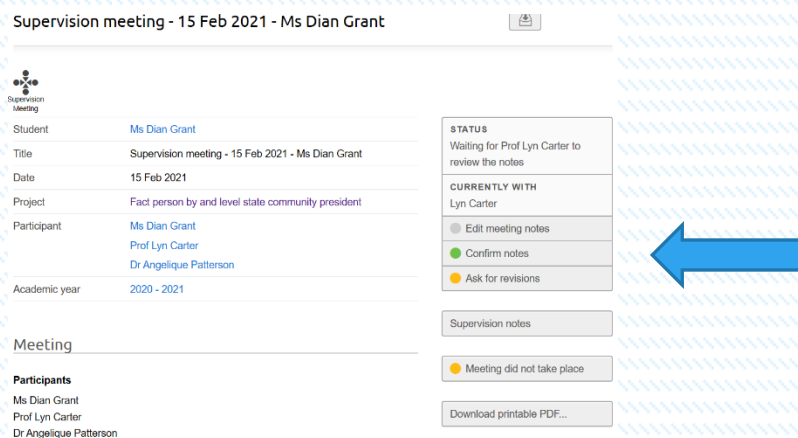
- Shown in the screen above is the submitted information to the supervisor from the student showing notes from the supervision meeting. Also noted on the right-hand screen in Fig 7 is the STATUS bar showing who the request is currently with and what action needs to be taken. In this instance this request 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: [Confirm notes](#) [Cancel](#)


**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	<a href="#">Ms Dian Grant</a>
Title	Supervision meeting - 15 Feb 2021 - Ms Dian Grant
Date	15 Feb 2021
Project	<a href="#">Fact person by and level state community president</a>
Participant	<a href="#">Ms Dian Grant</a> <a href="#">Prof Lyn Carter</a> <a href="#">Dr Angelique Patterson</a>
Academic year	<a href="#">2020 - 2021</a>

**STATUS**

Meeting notes confirmed

[Add follow-on note](#)

[Supervision notes](#)

[Download printable PDF...](#)

**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**



- 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 are 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 screenshot shows the 'Experience: Prof Tamarra Giles' page. At the top, there is a navigation bar with 'Search', 'Browse', 'Recent', and 'TESTING'. Below this, there are buttons for 'Tasks', 'Tamarra Giles', and 'Help'. A blue arrow points to the 'Tasks' button. The main content area is titled 'Experience: Prof Tamarra Giles' and shows 'Supervision experience' with a summary: '5 Total', '2 Complete', and '3 Active'. Below this is a table with columns: Student, Type, Role, Mode, Start, End, and Status. The table lists five students: 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), and Mr Stanwood Stephenson (PhD, Supervisor, Full Time, 2014-2019, Complete). A blue arrow points to the 'Active' status column. At the bottom, there is a button labeled 'Make changes to supervision experience'.

Student	Type	Role	Mode	Start	End	Status
<a href="#">Mrs Ilka Brennan</a>	PhD	Supervisor	Full Time	2019	2023	Active
<a href="#">Mr Aamir Butcher</a>	PhD	Internal	Full Time	2020	2020	Active
<a href="#">Mrs Jonis Marsh</a>	MPhil	Supervisor	Full Time	2019	2023	Active
<a href="#">Sergeant Ellis</a>	PhD	Supervisor	Part Time	2013	2018	Complete
<a href="#">Mr Stanwood Stephenson</a>	PhD	Supervisor	Full Time	2014	2019	Complete

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

Fig 13

The screenshot shows the 'Tasks' page. At the top, there is a 'Show future tasks' button. Below this, there is a task card titled 'Study break - Mr Aamir Butcher' with the description 'Please review this change request'. A blue arrow points to the task title. To the right of the task card, there is a link labeled 'Full info...'. On the far right, there are two small circular icons.

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

☐ Delegate this task  
☒ Submit supervisor review  
☐ Return to submitter

**APPLICATION**  
Change request form

Download printable PDF...

☐ Add note

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:

- 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

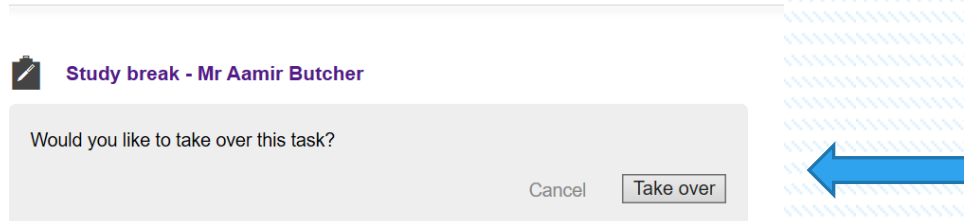
☒ Take over this task

**APPLICATION**  
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



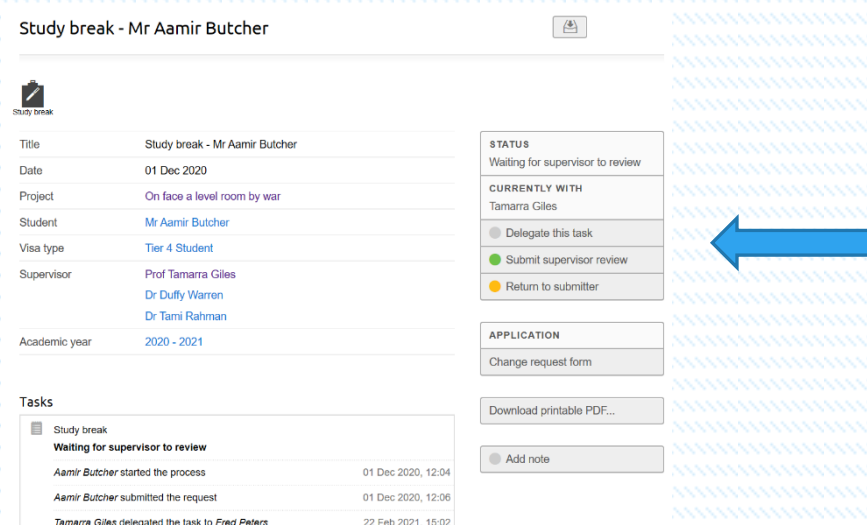
**Study break - Mr Aamir Butcher**

Would you like to take over this task?

Cancel **Take over**

- 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



**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
- Tamarra Giles delegated the task to Fred Peters 22 Feb 2021, 15:02

**STATUS**  
Waiting for supervisor to review

**CURRENTLY WITH**  
Tamarra Giles

☐ Delegate this task

☒ Submit supervisor review

☐ Return to submitter

**APPLICATION**  
Change request form

Download printable PDF...

☐ Add note

- 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**  
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

 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 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:

**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

STATUS

Waiting for ARC Coordinator to review

CURRENTLY WITH

Jeanie Hudson

APPLICATION

Change request form

ASSESSMENT

Supervisor form

Download printable PDF...

Add note

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

- 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

Study break - Mr Aamir Butcher: Change request 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  
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 whwere you are presented with the green submit endorsement button.



Fig 27

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

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

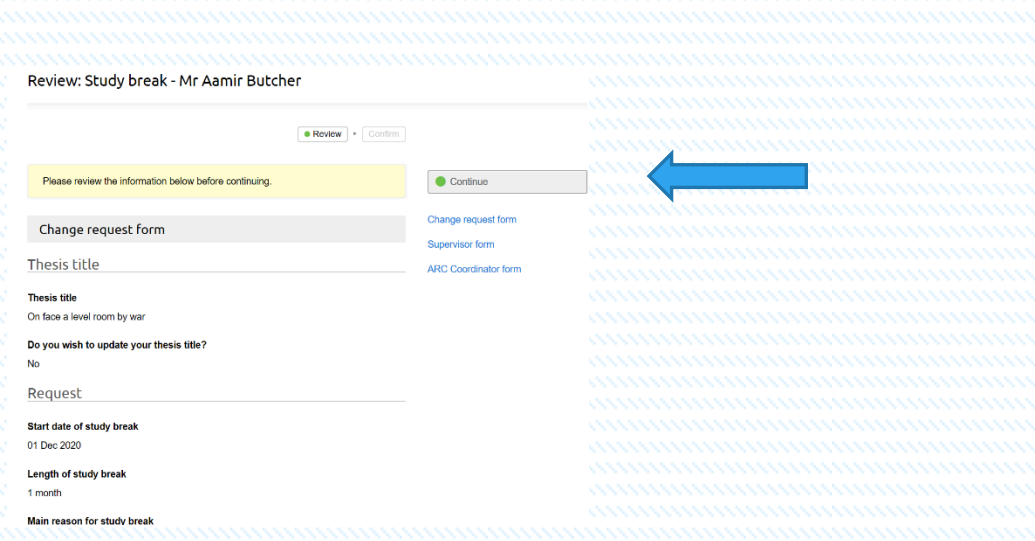
Save and continue

Save for later

- 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 prospective 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**

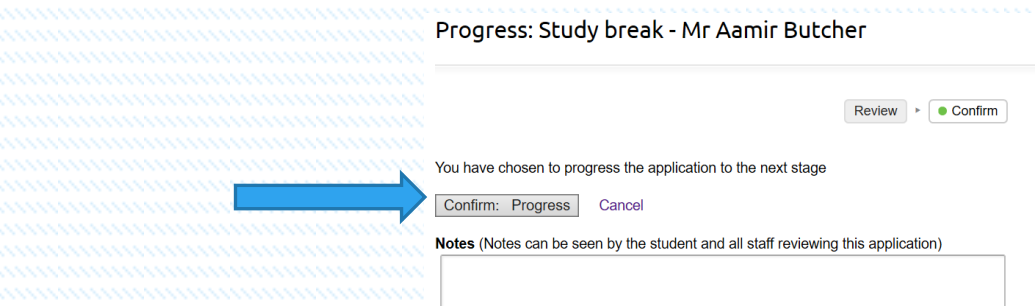
Start date of study break  
01 Dec 2020

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

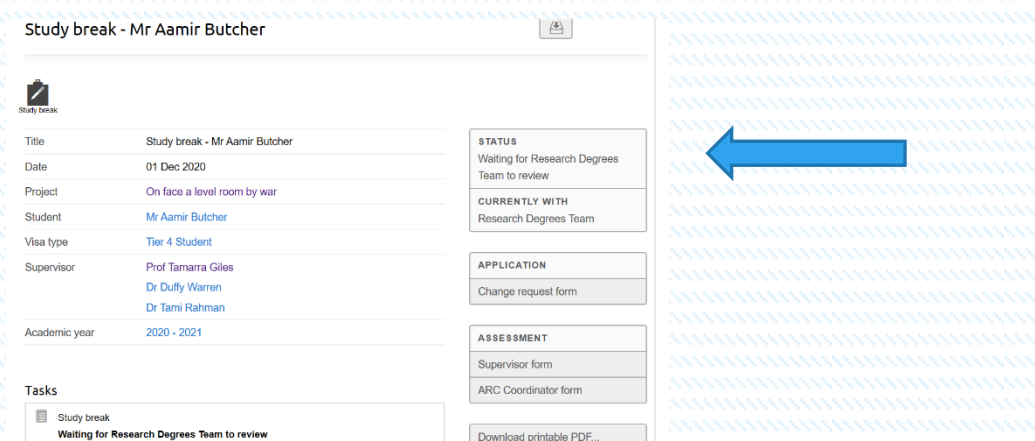
Confirm: Progress Cancel

**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

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

Taskbar

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**

**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

**STATUS**  
Waiting for ARCMG Chair to review

**CURRENTLY WITH**  
Avrom Turnbull

☐ Delegate this task

☒ Submit recommendation

☐ Return to ARC Coordinator

**APPLICATION**  
Change request form

**Task**

- 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**

Please review the information below before continuing.

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: Progress Cancel

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

### Directly supported and Affiliated Research 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

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



- 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**

**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**

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

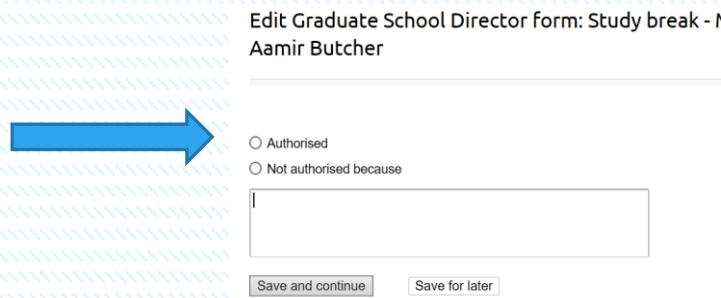
Barb Owens progressed the request 22 Feb 2021, 15:54

Barb Owens confirmed the request 22 Feb 2021, 15:58

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

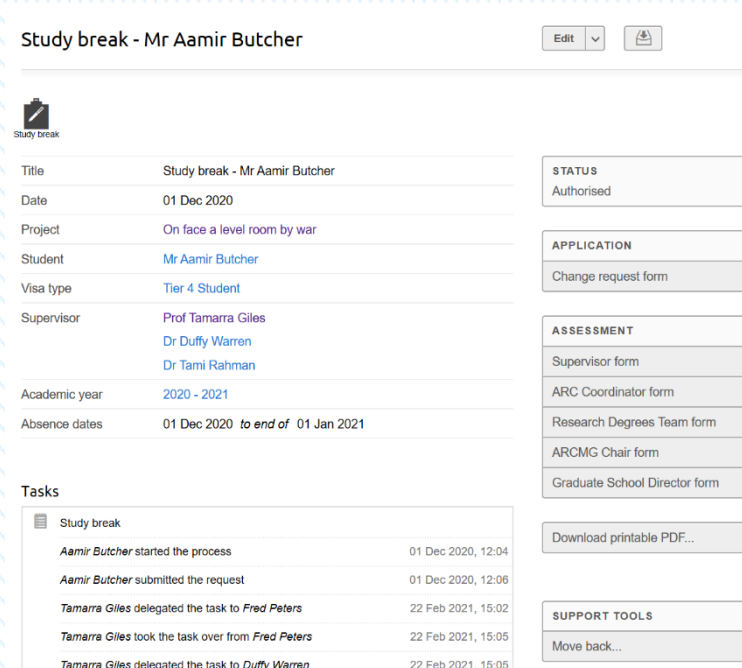


Edit Graduate School Director form: Study break - Mr Aamir Butcher

☐ 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

Task	Time
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...

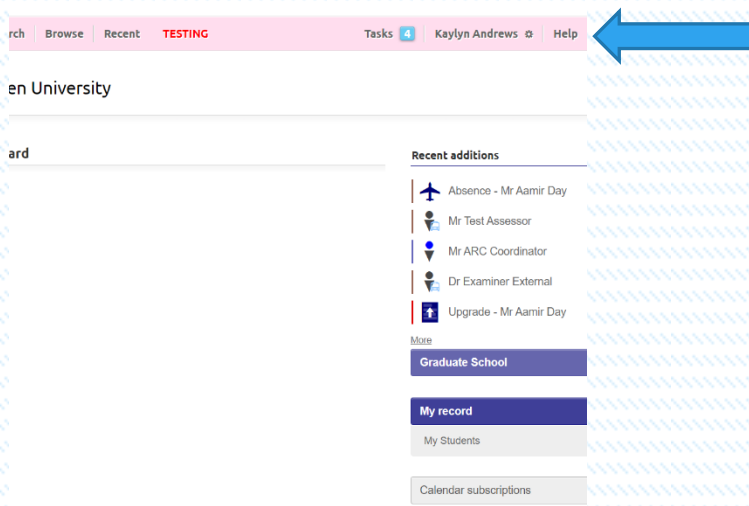
SUPPORT TOOLS  
Move back...

- 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

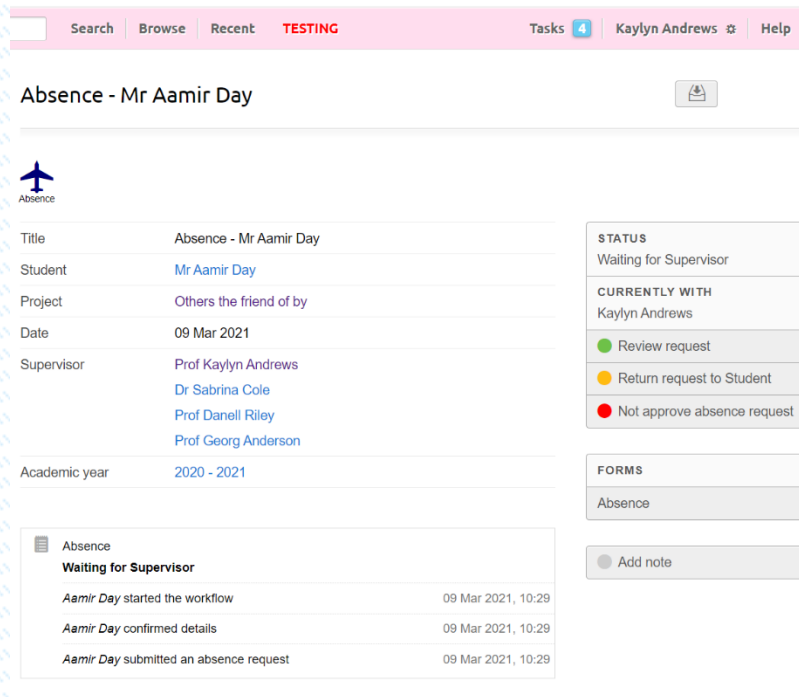
- If you have a student who has is a Student Route Visa Holder (previously known as Tier 4 student) there is an absence function on the main page which the student will be able to complete. Once the student has completed this task you will be advised by email notification and a task will appear in your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

 Absence

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

**STATUS**  
Waiting for Supervisor

**CURRENTLY WITH**  
Kaylyn Andrews

☒ Review request

☐ Return request to Student

☐ Not approve absence request

**FORMS**  
Absence

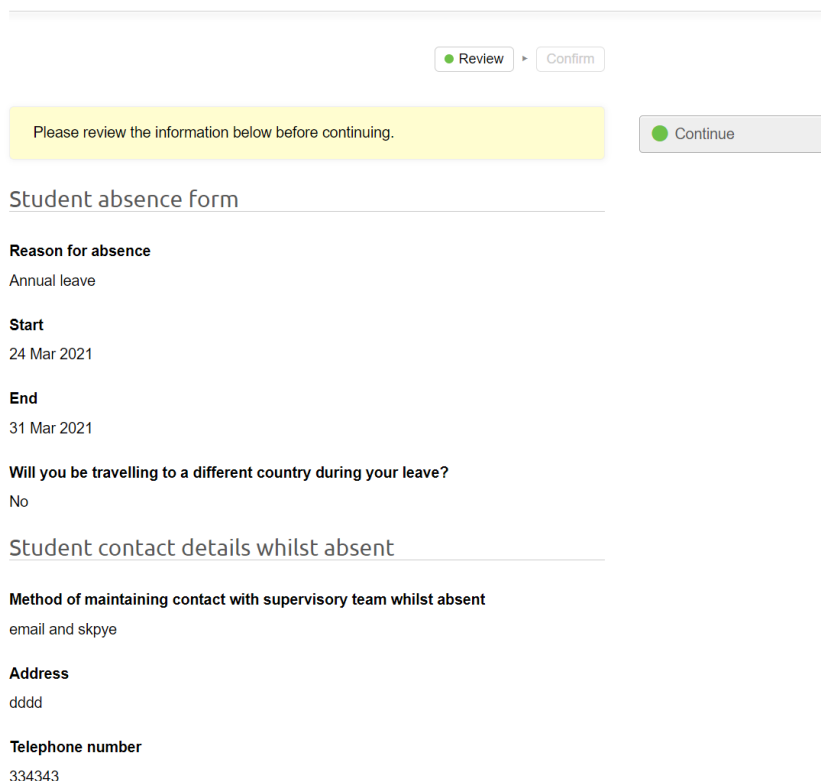
☐ Add note

**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

**Review request: Absence - Mr Aamir Day**

Review ▶ ☒ Confirm

- ☒ **Approve request**  
Approve the absence request
- ☐ **Return request to Student**  
Return the request to the Student
- ☐ **Not approve absence request**  
Cancel absence request

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

Fig 46

**Review request: Absence - Mr Aamir Day**

Review ▶ ☒ Confirm

Approve the absence request


Confirm:

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

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

Fig 47

**Absence - Mr Aamir Day**

 Absence

Title	Absence - Mr Aamir Day
Student	<a href="#">Mr Aamir Day</a>
Project	<a href="#">Others the friend of by</a>
Date	09 Mar 2021
Supervisor	<a href="#">Prof Kaylyn Andrews</a> <a href="#">Dr Sabrina Cole</a> <a href="#">Prof Danell Riley</a> <a href="#">Prof Georg Anderson</a>
Academic year	2020 - 2021
Absence dates	24 Feb 2021 - 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 1<sup>st</sup> 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

Search | Browse | Recent | **TESTING** | Tasks **3** | Kaylyn Andrews | Help

**Upgrade - Mr Aamir Day**

 Upgrade

Title	Upgrade - Mr Aamir Day
Student	<a href="#">Mr Aamir Day</a>
Project	<a href="#">Others the friend of by</a>
Date	12 Feb 2021
Supervisor	<a href="#">Prof Kaylyn Andrews</a> <a href="#">Dr Sabrina Cole</a> <a href="#">Prof Danell Riley</a> <a href="#">Prof Georg Anderson</a>
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**

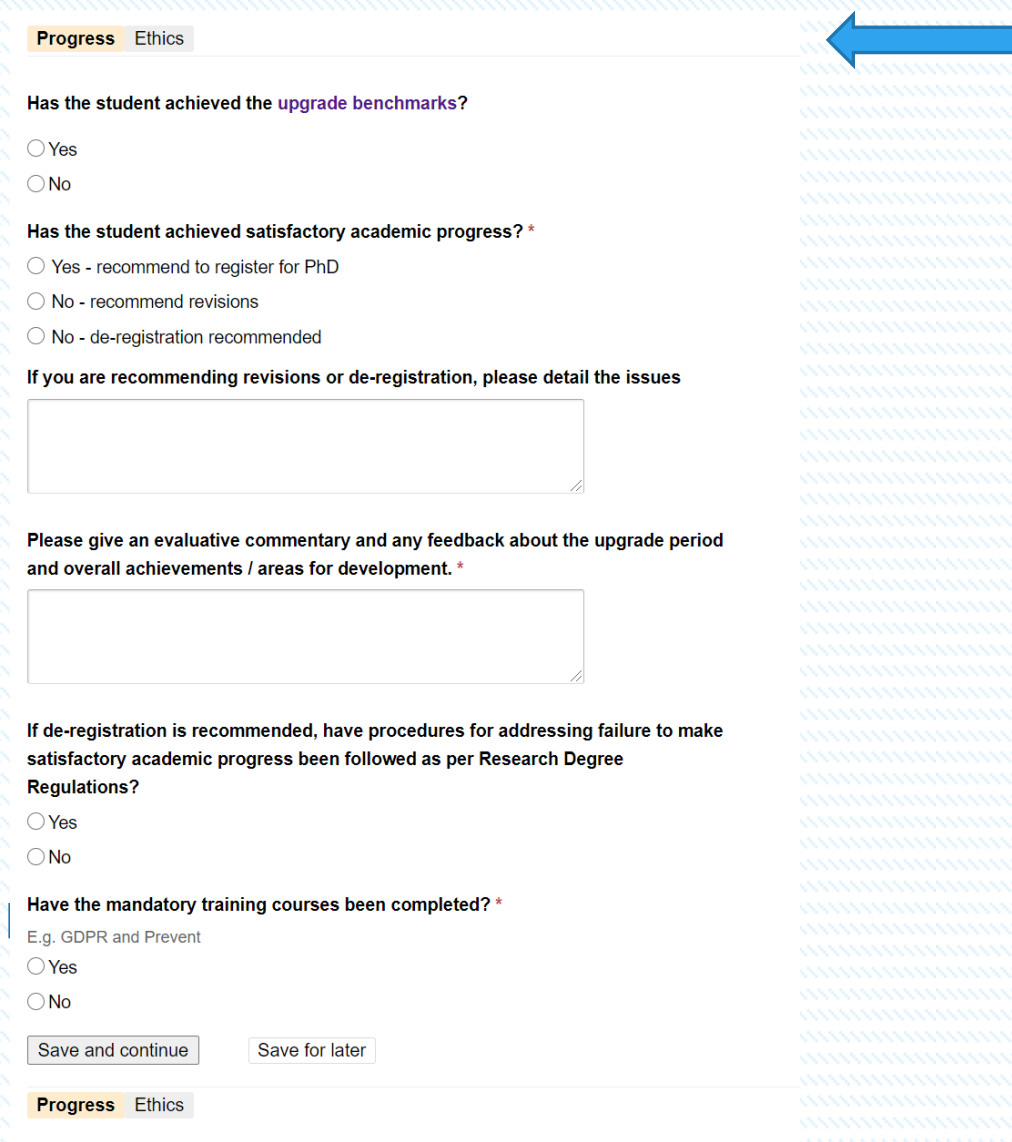
Upgrade	
Waiting for supervisor	
<i>Aamir Day</i> confirmed details	12 Feb 2021, 16:50
<i>Aamir Day</i> submitted the application	12 Feb 2021, 17:00

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



The screenshot shows the 'Progress' tab of a form. At the top, there are two tabs: 'Progress' (active) and 'Ethics'. A large blue arrow points to the 'Progress' tab. The form contains several sections with radio button options and text input fields.

**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...](#)

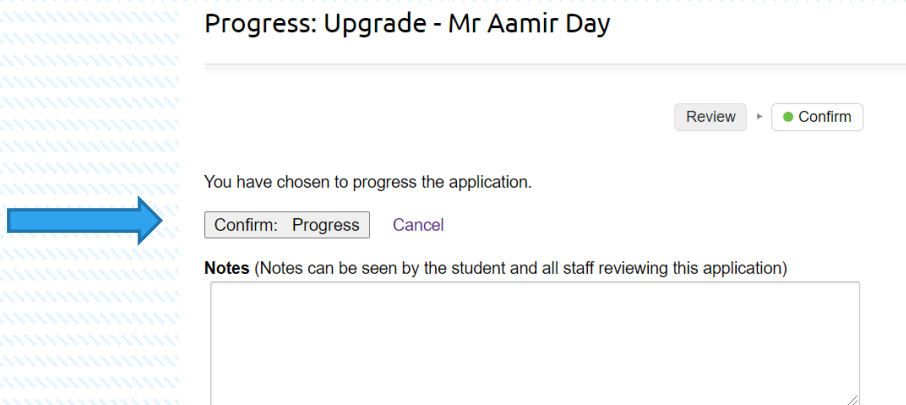
Test test test.docx X

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: Progress Cancel

**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.

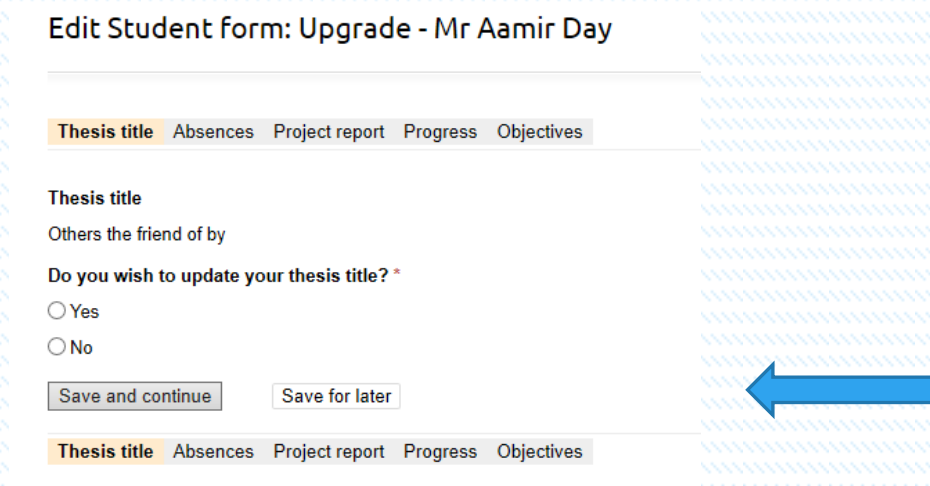
Request changes The registration details are correct

Student	Mr Aamir Day
Supervisor	<a href="#">Prof Kaylyn Andrews</a> <a href="#">Dr Sabrina Cole</a> <a href="#">Prof Danell Riley</a> <a href="#">Prof Georg Anderson</a>
Research Institute	<a href="#">Stowers Institute for Medical Research</a>
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? \***

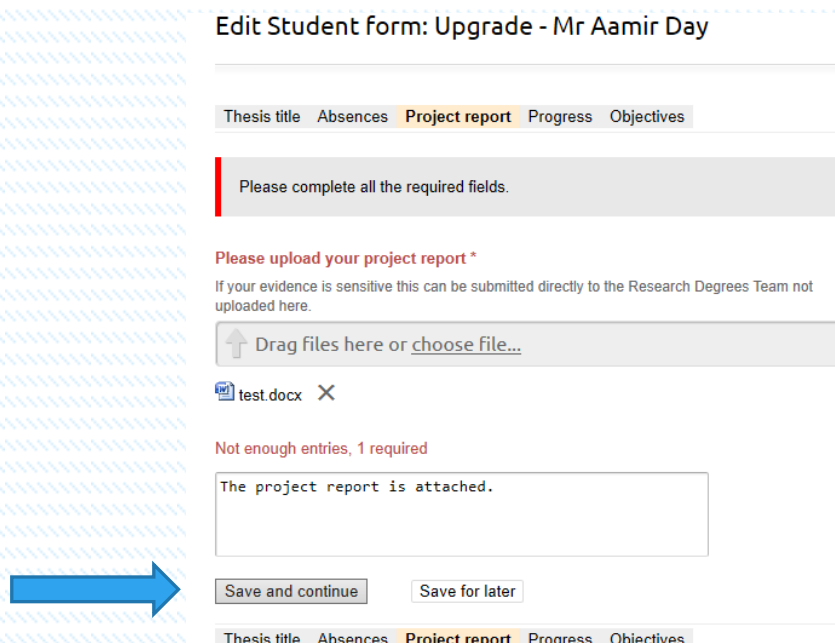
☐ Yes

☐ 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

Upgrade

Title	Upgrade - Mr Aamir Day
Student	<a href="#">Mr Aamir Day</a>
Project	<a href="#">Others the friend of by</a>
Date	12 Feb 2021
Supervisor	<a href="#">Prof Kaylyn Andrews</a> <a href="#">Dr Sabrina Cole</a> <a href="#">Prof Danell Riley</a> <a href="#">Prof Georg Anderson</a>
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	
Aamir Day confirmed details	12 Feb 2021, 16:50
Aamir Day submitted the application	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

grade - Mr Aamir Day

ent	Upgrade - Mr Aamir Day
ent	<a href="#">Mr Aamir Day</a>
ct	<a href="#">Others the friend of by</a>
	12 Feb 2021
rvisor	<a href="#">Prof Kaylyn Andrews</a> <a href="#">Dr Sabrina Cole</a> <a href="#">Prof Danell Riley</a> <a href="#">Prof Georg Anderson</a>
emic year	2020 - 2021
ant 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	
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

- 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

Edit Appoint Assessors: Upgrade - Mr Aamir Day

Appoint assessors Regulation

Please complete all the required fields.

Confirm Assessor

Prof Devora Abbott

Or where assessor does not have an existing record

Title	First *	Last *

Post

Address

Telephone

Email

Add another Remove

Not enough entries, 2 required

- 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

Edit Appoint Assessors: Upgrade - Mr Aamir Day

Appoint assessors Regulation

Can you confirm that there are no conflicts of interest in line with the Regulations?

☒ Yes

☐ No

Save and continue Save for later

Appoint assessors Regulation



Fig 59

- Check the information you have provided is correct and continue

Progress: Upgrade - Mr Aamir Day

Review ▶ ● Confirm

You have chosen to confirm appoint 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

 Upgrade

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

**Tasks**

Upgrade

**Waiting for viva date**

<a href="#">Aamir Day</a> confirmed details	12 Feb 2021, 16:50
<a href="#">Aamir Day</a> submitted the application	12 Feb 2021, 17:00
<a href="#">Kaylyn Andrews</a> progressed the application	09 Mar 2021, 16:43
<a href="#">Sam Townsend</a> 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 \***

[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

**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



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

- 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

lo

Impersonating Arif Lambert Finish

Search Browse Recent TESTING Tasks

### Edit Faculty/ARC form: Re-registration - Abby Norman

Has the student achieved satisfactory academic progress? \*

☐ Yes

☐ Yes, but with some concerns

☐ No

Describe what actions are being taken to resolve any issues or concerns with student's progress:

I confirm that the faculty/institute is satisfied with the student's progress and supports that they be re-registered. \*

☐ Yes

☐ No

If no, describe what actions should be taken:

Notes

Save and continue Save for later

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

Fig 66

lo

Impersonating Arif Lambert Finish

Search Browse Recent TESTING Tasks

### 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	<a href="#">Abby Norman</a>
Supervisor	<a href="#">Dr Teodor Holland</a> <a href="#">Dr Arel Lambert</a> <a href="#">Dr Sher Carter</a>
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	<b>23 Feb 2021</b>
Re-registration		13 Sep 2020	<b>13 Aug 2020</b>
Project end		18 Feb 2021	

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

## Examinations

Fig 68

**Haplo** Impersonating Abby Norman Finish The Open University

Search | Browse | Recent | **TESTING** | Tasks 2 | Abby Norman | Help

### Examination - Abby Norman

**Task 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

**Tasks**

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	

**STATUS**  
Pre-examination

**Notice to submit**  
Received

**Exam panel nomination**  
In progress  
Waiting for the supervisor's exam panel nomination form  
With: Teodor Holland

**Thesis submission**  
In progress  
Awaiting supervisor declaration form  
With: Teodor Holland

- 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

**Haplo** Impersonating Abby Norman Finish The Open University

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

### 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

Thesis submission: Examination - Abby Norman

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

Activity Log	
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](#)  
[Preview](#)

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.

[Confirm: Submit declaration](#) [Cancel](#)

**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

Search Browse Recent Add TESTING Tasks 11 Barb Owens Help

Thesis submission: 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
Date	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
Teodor Holland submitted their candidate declaration form	22 Mar 2021, 10:12
Arel Lambert submitted their candidate declaration form	22 Mar 2021, 10:15
Sher Carter submitted their candidate declaration form	22 Mar 2021, 10:16

**STATUS**  
Awaiting RDT/ARC coordinator review

**CURRENTLY WITH**  
Research Degrees Team

☐ Delegate this task  
☒ Review/edit RDT/ARC coordinator review  
☐ Refer to RDC  
☐ Return to supervisor

**APPLICATION**  
Student form

**ASSESSMENT**  
Supervisors' candidate declaration

- 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

Edit RDT/ARC coordinator review: Thesis submission: Examination - Abby Norman

I confirm that due process has been followed in the recommendation of this submission for examination, and that this form has been submitted by those named on the form \*

☐ Yes  
☐ No

**Hardcopy thesis posted to examiners \***

NOTE: the thesis should not be posted until the exam panel has been approved

- 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 the 'Examination - Abby Norman' page. The main content area includes a form with the following fields:

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

On the right side, there is a 'STATUS' section with the following information:

- STATUS:** Pre-examination
- Notice to submit:** Received
- Exam panel nomination:** In progress  
Waiting for the supervisor's exam panel nomination form  
With: Teodor Holland
- Thesis submission:** Complete
- Viva scheduling:** In progress  
Waiting for the Viva to be scheduled  
With: Rene Cartwright

A blue arrow points to the 'Exam panel nomination' section. Below the main content area is a 'Tasks' list with the following entries:

- 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**

- 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' page. The main content area includes a form with the following fields:

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

On the right side, there is a 'STATUS' section with the following information:


- STATUS:** Waiting for the supervisor's exam panel nomination form
- CURRENTLY WITH:** Teodor Holland
- Actions:**
  - Delegate this task
  - Edit exam panel nomination

A blue arrow points to the 'CURRENTLY WITH' section. Below the main content area is a 'Tasks' list with the following entry:

- Examination record**
  - Teodor Holland started the workflow (18 Feb 2021, 08:59)

- 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 *

Post

Address

Telephone

Email \*

Number of research degree students supervised and examined:

	UK MPhil	UK PhD	Prof Doc
Currently supervising			
Supervised in			



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.)

**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		
Supervisor	<a href="#">Abby Norman</a> <a href="#">Dr Teodor Holland</a> <a href="#">Dr Arel Lambert</a> <a href="#">Dr Sher Carter</a>		
Task	By issue business moment study food lot by		
Issue date	17 Feb 2021		
Academic year	2020 - 2021		
Activity Log	<div> <div>Teodor Holland started the workflow</div> <div>18 Feb 2021, 08:59</div> </div> <div> <div>Teodor Holland submitted the form</div> <div>22 Mar 2021, 16:19</div> </div>		

**STATUS**  
Awaiting DAD/DRD/ARC coordinator approval

**CURRENTLY WITH**  
Arel Lambert

☐ Edit exam panel nomination  
☒ Progress  
☐ Return to supervisor

**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**  
fgfg

**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

Search Browse Recent TESTING Tasks 5 Melodee Bull

panel nomination: Examination - Abby Norman

Examination - Abby Norman	
Abby Norman	
Dr Teodor Holland	
Dr Arel Lambert	
Dr Sher Carter	
By issue business moment study food lot by	
17 Feb 2021	
year	2020 - 2021
Idor Holland started the workflow	18 Feb 2021, 08:59
Idor Holland submitted the form	22 Mar 2021, 16:19
L Lambert progressed the application	22 Mar 2021, 16:41
O Owens progressed the application	22 Mar 2021, 16:43

**STATUS**  
Awaiting Open University Research Degree Committee decision

**CURRENTLY WITH**  
Melodee Bull

- Edit research degrees committee decision
- Forward to RDC deputy chair
- Return to RDT
- Return to supervisor
- Return to DAD/DRD/ARC coordinator

**APPLICATION**  
Exam panel nomination

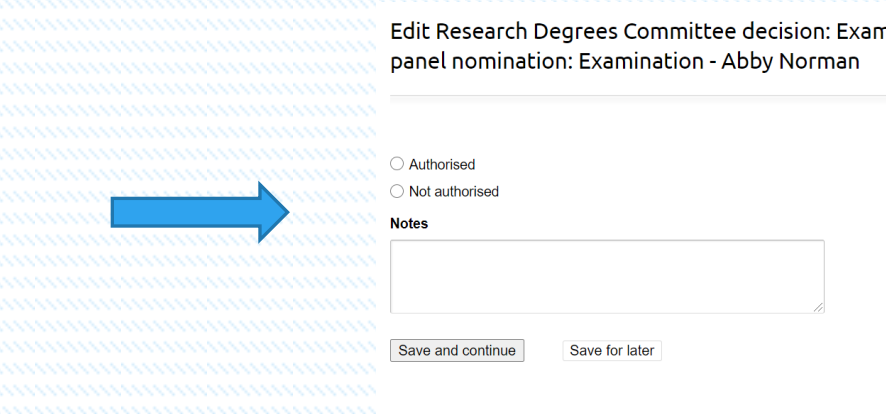
**ASSESSMENT**  
Work rights

Add note

- 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

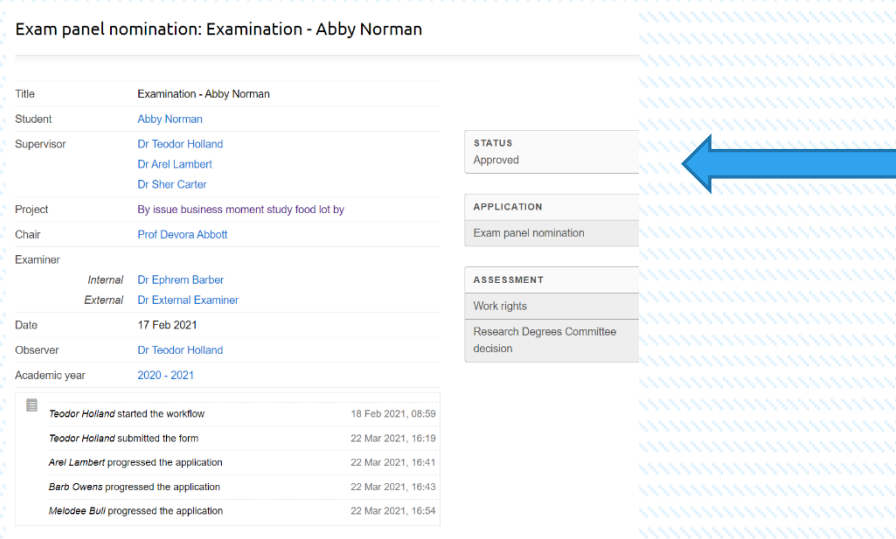
☐ Authorised  
☐ Not authorised

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

**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](mailto:pgrmanager@open.ac.uk)*