

# PGR CoP – Instructions for Administrators

*PGR CoP is the Website supporting the PGR Code of Practice, including the Project Approval, Annual Progression and other PGR processes. These instructions for administrators are in addition to the context-sensitive help within the Website.*

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PGR CoP can be accessed via ePortfolio: <https://portfolio.ncl.ac.uk/>

or directly for frequent users: <https://postgrad.ncl.ac.uk/>

# At a Glance

## Home page

The Home page dashboard features several key components:

- Navigation:** Top bar with 'PGR CoP', 'Home', 'List', 'Reports', 'Help', 'FAQ', and user profile 'Simon Cotterill'.
- Widgets:** 'Project Approval', 'Annual Progression', and 'Nominations of Examiner' cards, each with an 'ADMIN USERS SUMMARY' table.
- Search:** A search bar labeled 'Search for students and staff'.
- Interactions:** Callouts indicate 'List View', 'Reports', 'Context-sensitive help', 'Profile & logout', 'Click to expand/hide summary', and 'Click to view list of these students'.

Layout differs depending on your role(s) and responsive design adjusts to screen size:



## List view

The List view interface includes the following elements:

- Tabs:** 'Learning Agreement', 'Project Approval', and 'Progression' tabs.
- Record Filters:** 'Record Filters (click to show/hide)' with buttons for 'Current', 'Progression - with HoS', 'Not Exempt', and 'Reset filters'.
- Bulk actions:** 'Check All', 'Uncheck All', and 'Admin Actions' buttons.
- Table:** A table with columns: Student, Stage, Course, School, Current Status, and Actions.
- Interactions:** Callouts for 'Set your filter', 'Bulk actions', and 'View Record'.

Student	Stage	Course	School	Current Status	Actions
Smith, Fred 10111891	Year 2	PhD AFRD (FT)	Agriculture, Food & Rural Development	progression   with HoS	View record Admin Tools
Jones, Sarah 10112891	Year 1	PhD AFRD (FT)	Agriculture, Food & Rural Development	progression   with HoS	View record Admin Tools
Smith, Jane 10131891	Year 3	PhD AFRD (FT)	Agriculture, Food & Rural Development	progression   with HoS	View record Admin Tools
Jones, John 10111691	Year 1	MPhil in AFRD (Staff)	Agriculture, Food & Rural Development	progression   with HoS Referred to "with HoS" by Bryn Jones	View record Admin Tools

## Student Profile

The Student Profile page for Ian Gillan features:

- Navigation:** 'PGR CoP', 'Home', 'List', 'Reports', 'Help', 'FAQ', and user profile 'Simon Cotterill'.
- Profile:** 'Ian Gillan's profile' with a 'Copy Link' button.
- Tabs:** 'Records', 'Timeline', 'Student Information', 'Meetings', and 'Admin'.
- Records Table:** A table with columns: Record, Academic year, Status, Dean recommendation, Last modified, Deadline(s), and View record.
- Interactions:** Callouts for 'Select the relevant tab', 'manage deadlines, panel members, exemptions etc.', and 'View a specific record'.

Record	Academic year	Status	Dean recommendation	Last modified	Deadline(s)	View record
Project-Approval - # 16210	2015 / 2016	with Supervisor	N/A	Sept. 7, 2015, 1:53 p.m.	Within 3 months of starting	View record
Progression - # 12838	2014 / 2015	Deadlines Set	Awaiting sign off	Apr 9:27 a.m.	June 30, 2015	View record
Progression - # 11066	2014 / 2015	Completed	Awaiting sign off	April 22, 2015, 9:27 a.m.	Dec. 1, 2014 / Dec. 1, 2014	View record

## Overview

PGR CoP is designed to support key aspects of the Code of Practice, including Project Approval, Annual Progressions and other processes using one interface, with consistent features (lists, filters, dashboards, forms etc.) and tools for managing the workflow. This is a sustainable replacement for 3 older systems which had been developed separately over time.

PGR CoP integrates closely with institutional data (SAP SLcM, Individual Work and NUIT accounts). It is a role-based system, with special roles (Graduate School Administrators, School PGR Administrators, HoS/nominee, Dean/Nominee) managed by the Research Student Support Team (RSST) and Graduate School. The PGR CoP Website (institutionally-owned processes) integrates closely with the University ePortfolio (student-owned information + supervisory meeting records), and both are developed and maintained by LTSU, and often referred to collectively as 'ePortfolio'.

This document provides detailed instructions on how to use PGR CoP for administrators. There is additional information available via the context-sensitive help within the Website.

### Further sources of support:

Process/Policy issues: [Student Progress Website<sup>1</sup>](#)

FMS: [medpg-enquiries@ncl.ac.uk](mailto:medpg-enquiries@ncl.ac.uk)

HASS: [gradschool@ncl.ac.uk](mailto:gradschool@ncl.ac.uk)

SAGe: [gradschool@ncl.ac.uk](mailto:gradschool@ncl.ac.uk)

Technical issues: [it.servicedesk@ncl.ac.uk](mailto:it.servicedesk@ncl.ac.uk)

### Project Approval

Project Approval is required within 3 months of a student starting. The online process is student initiated (administrators don't normally set a deadline, though this facility is available if required). Schools do need to assign panel members for students. Following the student submission there are supervisor, panel, HoS steps before sign-off by the Dean.

### Annual Progression

Deadlines are set each year for students, supervisors and panels. If any of the panel have changed then these should be updated. Students and supervisors receive an Email when the deadlines are set and either party can submit first. Reflecting the policy, students can opt to share their submission with supervisors, whilst supervisors forms can be seen by the student. Following the student and supervisor submissions, panel, HoS steps before sign-off by the Dean.

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<sup>1</sup> <http://www.ncl.ac.uk/students/progress/student-resources/PGR/>

## Nomination of Examiners

The Final Approval of Title and Nomination of Examiners process should begin about 6 months before completion. The online process is student initiated (administrators don't normally set a deadline, though this facility is available if required). After the student step the supervisor nominates internal and external examiners, before sign-off by HoS and Dean (no panel step).

## Key Concepts

### States (the stage of a process)

There are several stages to processes such as Annual Progression, and therefore several 'states' that the record can be in. A record can only be in one state at any one time. The current state is indicated by the Progress Bars (see below), when viewing a list of students, or on the summary page of a record. Graduate School Administrators have the facility to intervene and Modify the State of a record (for example moving it on a stage). Filters on the List View let you quickly focus on records in a given State, for example all the records 'with HoS'

Deadlines Set
with Student
with Supervisor
with Panel
with HoS
✓ with Dean
with Admin
Completed
Uncompleted

### Current Record

The current record is 'active' and normally the latest annual progression. Students can have only one current record and only current records can be edited by students, and staff (this avoids potential confusion where a student might complete one record, but a supervisor completes a different one). When a new record is created the previous current record automatically becomes non-current. Administrators have the ability to set older records to 'current' (except fixed records imported as PDFs from the old system). For the student-initiated processes (Project Approval & Nominations) a new 'current record' is created as soon as they start the form.

## Site Menu

The menu across the top of the system remains consistent throughout the system, and contains:

- Home – link to the home page of postgrad.ncl.ac.uk;
- List – view all students against the last viewed list (remembers your previous preferences);
- Reports – view selected reports, including supervisor/student meetings completed;
- Envelope – any messages sent from you or including you are listed here;
- i and Help – context-sensitive help throughout the system;
- ? and FAQ – Frequently Asked Questions and how to provide feedback.



## Home Page

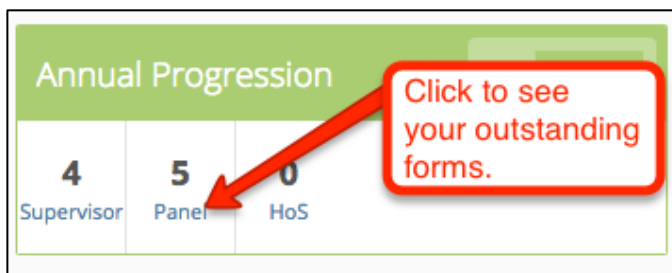


### Search

Search for a student by typing in their name (or part of it).

### To Dos

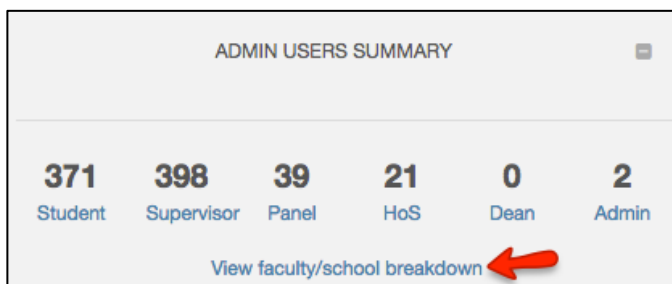
The Staff Home Page is focussed on To-Dos and shows the number of outstanding actions you have as Supervisor, Panel Member and if applicable as Head of School, Dean or Administrator.



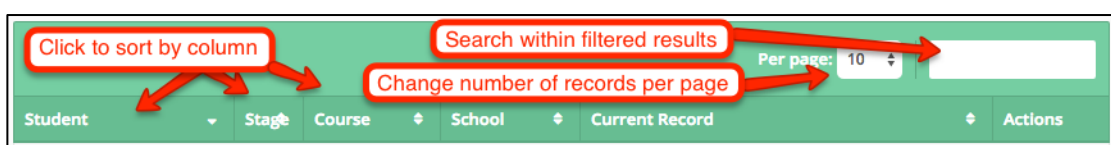
The To Do box will show you highlights of the number of outstanding actions against you according to your role(s) as supervisor, panel, HOS etc. Zero indicates no outstanding actions. Clicking on the link takes you to the List view and you can see the relevant students.

### Admin User's Summary

Administrators, HOS & Deans also see an overview of Progressions at each stage for their School/Faculty. Clicking on the link takes you to the List view so you can see the relevant students - for example all those at the HoS stage. For those with access to Faculty there is an option for viewing a more detailed breakdown by Faculty/School.



## List View



The table of students shows summary information, including the current state of progress, and any late (in red) or forthcoming (in green) deadlines attached to progression, for all parties involved in the process.

Hover over the progress bar to see further information about when the status last changed.

### Ordering fields

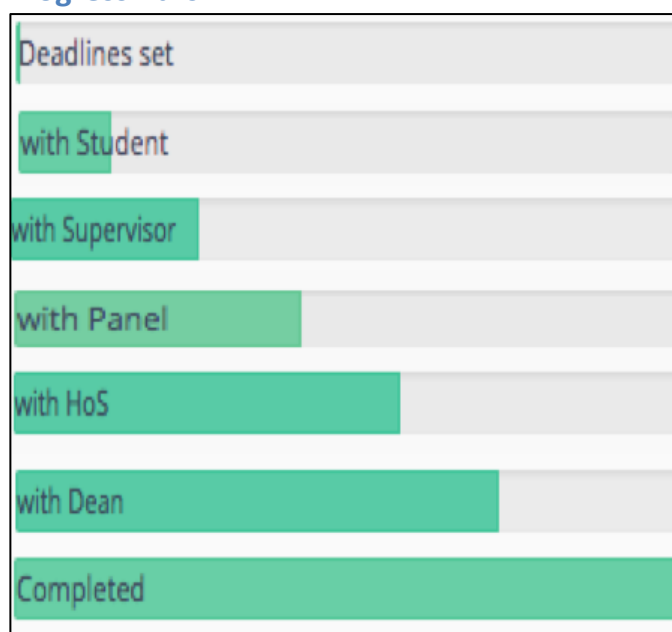
To order results by a particular field, click on the field title. The up/down arrow will be replaced by an up or down arrow to indicate which field the results are being ordered by, and in which direction.

To change the direction, click on the field title again.

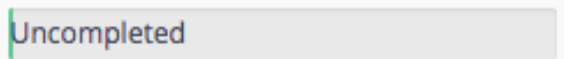
### Getting more information about a student

Further information on the student is available by clicking on the student's name. This will tell you more information about their status of registration, and also their progress through the system.

### Progress Bars



In addition there are less routine states:



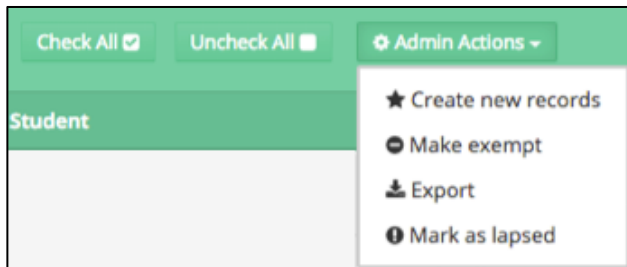
'Uncompleted' – Lapsed (students and staff cannot edit the forms)



'with Admin' - The main situation where this is used is where the Dean recommendation is 'do not proceed' and RSST/Graduate school will take the appropriate action (n.b. automated Email not sent to student for 'do not proceed')

## Bulk Actions

Administrators only have access to 'Check All' and 'Uncheck All' options, although this is limited to 100 records to minimise risk of effecting large numbers of records by mistake.



The bulk Actions include Export, which generates an Excel spreadsheet including the students checked in the list.

Additional admin actions allow student records to be updated (new records/setting deadlines created, exemptions and lapses to be recorded), and records to be exported. These actions and others can be applied to individual students via the Student Profile 'Admin' tab.

For details of specific actions see the section below: **Admin Actions on Records**

## Filters

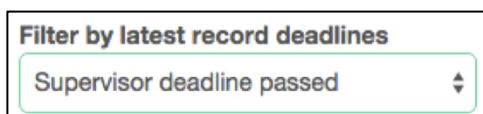
Filters that are currently applied will be shown in turquoise bubbles. Some filters are automatically applied when you view this page. The filters available depend on your role and privileges in the system.

To change further filters, use the small grey + symbol to the right of the current filters. This will expand the view to show the possible filtering options, from which you can choose your own specific filters. Note: the filters available to you are customised by role and your level of permissions in the system.

Any additional filters or field ordering that you apply in one session will be remembered for the next time you return to the system. In this way, you can customise your view to maximise efficiency in the system.

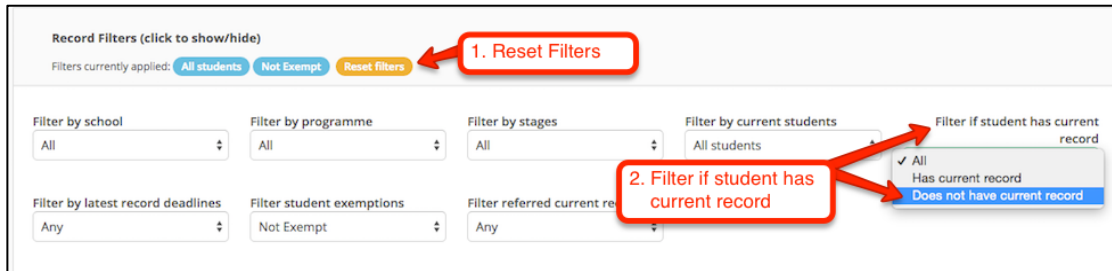
Lists from the home page To Do boxes have default filters applied, and these views will override any of your previously saved filter settings.

Filtering Compliments Progress Bars: a key feature of the system is that administrators can now quickly zoom in on outstanding actions [using filters](#). For example filtering a list on all records where the supervisor deadline has passed - or the student deadline has passed.



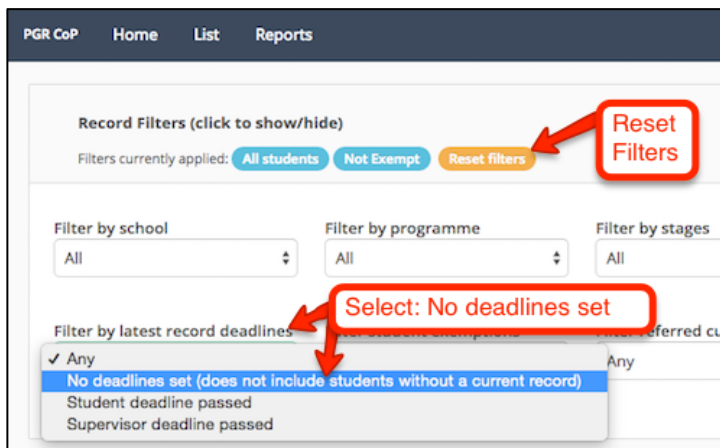
## Identifying students with no current record

To view students who have no current progression record, reset the filters using the options at the top, then filter students using the 'current record' option to show only students without a current record.



## Identifying students with no deadline set

To view students who have no deadlines set, reset the filters using the options at the top, then filter students using the 'record deadlines' option to show only students with no deadlines set.



## Record View

The Summary page shows the current status of the student's progression record, and if you have any actions waiting.

Each tab will indicate clearly whether action from you is required, or whether it is pending actions by others. Complete the relevant questions, and use the 'Confirm & Submit' button at the bottom of the form to complete and send it. Use the 'Save' option if you need to come back to it later.

Note: the options available depend on your role and level of privileges.



## Student Profile

Records	Timeline	Student Information	Meetings	Workshops	Admin
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The student profile page has the following tabs:

1. **Records** - showing project approval, annual progression and nomination of examiners for the student, and at which stage they are in these processes.
2. **Timeline** - a pictorial chronological summary of processes and stages of sign off.
3. **Student Information** - detailing registration history and supervisors.
  - *Please note:* the information in this section comes from SAP SLcM. It is regularly updated but will be at least one working day behind, occasionally more.
4. **Meetings** – view of supervisory meetings (dates, attendees, confirmation status)
5. **Workshops** – view a list of training workshops attended
6. **Admin** - facilities to add panel members, set new deadlines and exemptions, and view uploaded documents from the student (*restricted access*).

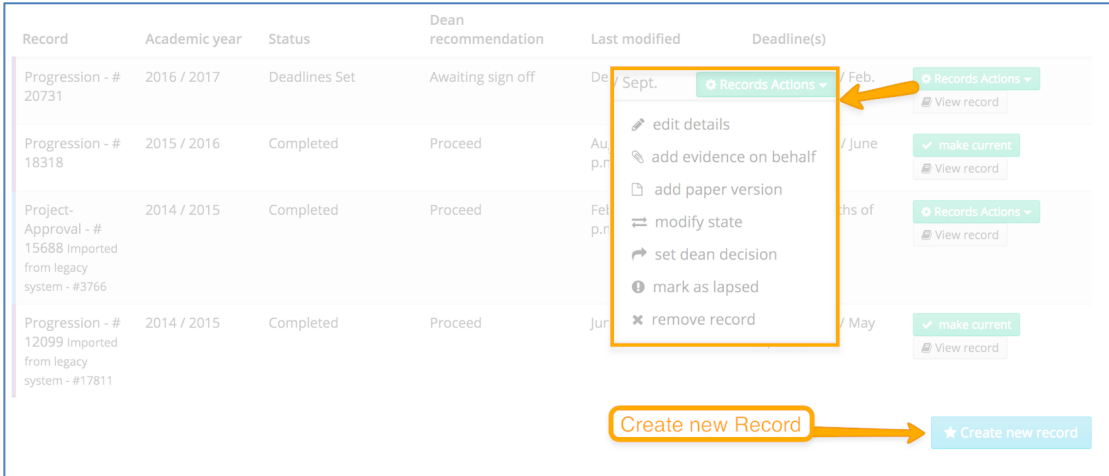
## Admin Actions on Records

Summary of privileges:

Actions	School Admin	Grad School	Notes
Create Record	Y	Y	Create a new record, including deadlines
Manage Panel	Y	Y	Add Panel members / mark inactive
Add Exemption	Y	Y	Add a period of exemption from Annual Progression.
Add Evidence on behalf of	Y	Y	Upload documents for students
Remove Record	Y	Y	Only empty records can be removed
Add/Edit Examiners	Y	Y	Nomination of Examiners
Edit Record	Y	Y	Only current Records can be edited
Make Current	-	Y	Make a record current (needed to edit non-current records)
Modify State	-	Y	Move the process forward/back

			and record the reason why, and send Email
Mark as Lased	-	Y	Close the record, mark as Uncomplete
Set Dean Decision	-	Y	Proceed/Do not proceed (only used under exceptional cases)

The Admin tab lists records and provides the facility to create and edit records:



### Create Record

To create a new record, select the 'Create new record' button and fill in the relevant details including component (e.g. Progression) and required deadline dates. Untick the 'send email' option if you do not want to generate email notifications. Save the form when finished.

**Important:** When you create a record this becomes the “current” record i.e. it appears in the List View and easily accessible for students, supervisors, panels etc.

Any other open record of the same component (e.g. Progression) will be set to “non-current” ie. not displayed in the List View. It is usually best practice not to create a new record if one is still active and part way through the process. RSST/GS have the facility to change which record is current (see below).

Component: Progression

Programme code:

Stage code:

Academic year: 20142015

Student deadline:

Supervisor deadline:

Panel deadline:

Send Email

Save Save

Add in the required deadline dates

Untick if you don't want to generate Email notifications

Save

### Edit Record

To edit the record, select the 'Records Actions' drop down button and choose 'edit details' from the list. Make the changes as for the record and save.

### Mark as Lapsed

To mark a record as lapsed, select the 'Records Actions' drop down button and choose 'mark as lapsed'. This sets the state of the record to "Uncompleted" and the record becomes non-current.

### Paper Records

Online submission should be encouraged but if a paper form is received then this can be scanned-in and the file uploaded.

When the file is uploaded it automatically moves the record on to the next stage. For example if a supervisor form is added and the student has already submitted their form it will move to the state: 'with Panel'.

**Add paper version**

**Student** Fred Blogs  
**Record:** Progression 11516  
**Status:** Deadlines Set

You can add files for the following sections of this record. Please note this will progress the state of this record as indicated below.

**Student form**  
 No file chosen  
 Uploading a document here will progress the state of this record (no emails will be sent).

**Supervisor form**  
 No file chosen  
 Uploading a document here will progress the state of this record (no emails will be sent).

**Panel form**  
 This is only allowed when the state of this record is 'with Panel'

**Send Email**

**Upload on Behalf of**

To add evidence on behalf of the student, select this option from the 'Records Actions' drop down button and choose the relevant file.

**Modify State**

This facility is only available to RSST/Graduate School staff. It allows records to be moved forward or backward a stage(s) in the process. A reason must be specified and this is displayed on the timeline, visible to all parties.

Go to the Panel Members area under the **Admin** tab of the **Student Profile**.

**Modify State**

**Current State** Deadlines Set

**Modify State**    
 Not Set  
 Deadlines Set with Student  
 with Supervisor  
 with Panel  
 with HoS  
 with Dean  
 with Admin  
 Completed

**Reason**

**Send Email**

For example if a record is 'with Panel' you could set it back to 'with Supervisor'. This will effectively unlock the Supervisor form so that information can be

added/revised. The Supervisor will then need to submit again in order for it to proceed to the Panel.

### Remove Record

Remove is only available if both the student and the supervisor haven't started the process (saved or submitted the form). The student profile indicates that there are removed record(s). Generally if the process has been started then the best approach is to Mark as Lapsed (see above).

### Set Dean Decision

Set dean decision (Proceed or Don Not Proceed) is only used for exceptional circumstances.

### Panel Members

To add panel members, from the Admin tab, use the 'Add Panel members' button to search for a member of staff on name or username. Select the appropriate member and add them. If the panel changes then use 'Set Inactive' to signify that a member of staff is no longer on the panel for the student.

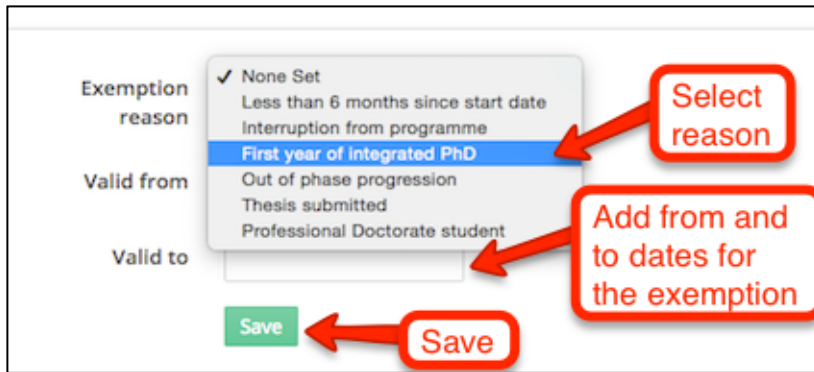
**Important:** the same panel used for Project Approval will be carried forward into Annual Progression (normal practice for most of the University). If you School has different panels for Annual Progression, then you will need to update the panel before assigning deadlines.

### Exemptions

Exemptions can be applied:

- to an individual via the Student Profile 'Admin' tab.
- to a group of students selected in List view.

To add an exemption, from the exemption section select the 'Add Exemption' button. Complete the relevant details and save.

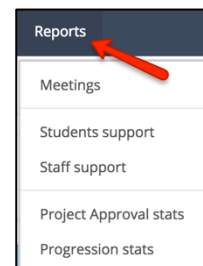


## Reports

### Meetings

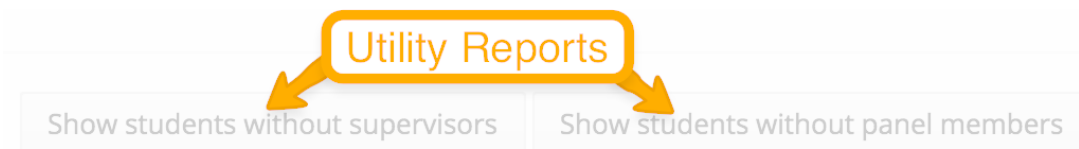
This provides a list of students and summaries of their supervisory meetings – this is to enable Schools to monitor that requirements are being met for the Code of Practice and for Attendance Monitoring.

- The report shows number of meetings in the current academic year and number confirmed/unconfirmed. The meeting notes remain confidential to the student and supervisor(s).
- The lists and filters work in the same way as the main List view (see above).
- There is a specific filter to pick students by Fee Type (e.g. International students).
- 'Export' lets you download an Excel spreadsheet containing the list of students, number of meetings, date of latest meeting and other details.
- 'View all meetings' shows a full list of meetings/attendees (not just the current academic year).



### Student Support

#### Utility Reports



These reports are particularly relevant for Project Approval. A key thing to remember is that supervisors for research degrees are recorded in the Individual Work part of SAP SLcM (the Advisor field in SAP is only used for taught

students). This applied to all programmes classed as research (“30”) on SAP, including MRes.

### Student Processes

Show students Without  the process   recorded in SAP Show

Generate lists of students, with or without a range of processes recorded in SAP SLcM. **Remember:** the information is updated each night from **SAP SLcM**. It will usually be at least one working day behind.

### Staff Support

Show staff panel report

List of staff and number of panels and links to staff profiles