



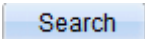
Supervisors - Research Student Lifecycle

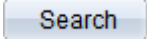


1. Supervisor Dashboard

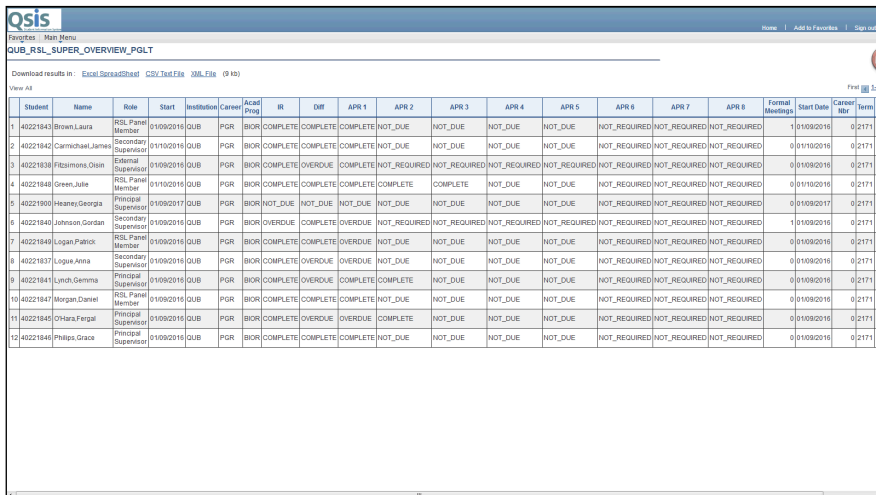
From October 2017, all research supervisors will have access visual dashboard containing details of the progress of any research students they supervise.

The students, supervisors and student information displayed throughout this simulation are purely fictional. No real students or student data has been used.

Step	Action
1.	Click Main Menu . Main Menu
2.	Click Records and Enrollment . Records and Enrollment
3.	Click Graduate Research Management . Graduate Research Management
4.	Click QUB Research Student Lifecycle . QUB Research Student Lifecycle
5.	Click QUB RSL Supervisor Dashboard . QUB RSL Supervisor Dashboard
6.	The QUB RSL Supervisor Dashboard consists of 3 panes: - Students on Leave of Absence - Visual view of the progress of active students - Qsis Links for Supervisors
7.	The key milestones are listed for each student. IR = Initial Review Diff = Differentiation APR1- APR8 - Annual Progress Reviews Full time students will typically have 3-4 APRs attached while part-time students will have up to 8.

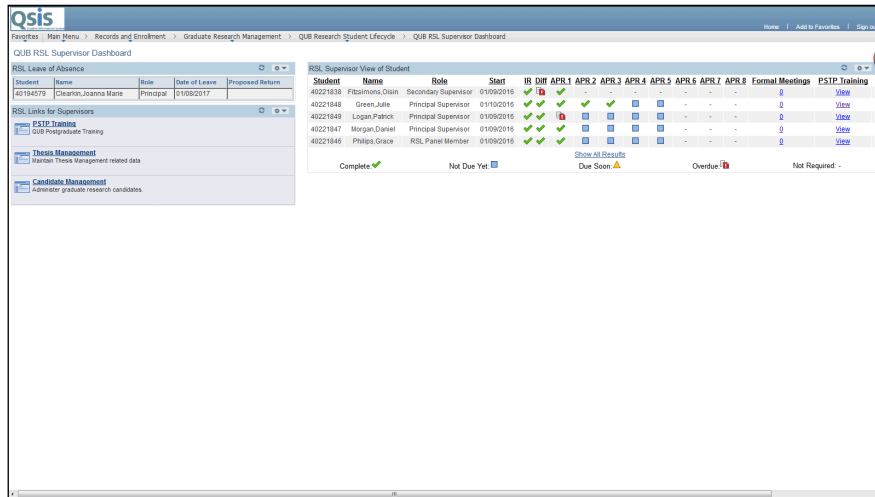
Step	Action
8.	<p>The main element of the dashboard will be a list of the active students attached to the supervisor. The supervisor can be attached in any of the following roles:</p> <ul style="list-style-type: none"> - Principal Supervisor - Secondary Supervisor - Tertiary Supervisor - Co-Supervisor - External Supervisor - RSL Panel Member
9.	<p>Each milestone is represented by one of five icons:</p> <ul style="list-style-type: none"> - Complete - Not Due Yet - Due Soon - Overdue - Not Required <p>These icons are populated automatically. They are based on the date the student started their studies combined with the standard dates when the milestones are due for their studies e.g. for a standard full time PhD student differentiation is due approximately 9 months after the start date.</p> <p>Any leave of absences are taken into account in the calculation of due dates. School administrative staff can also manually adjust the due dates.</p>
10.	<p>The icons are Quick links that take you directly to a specific milestone.</p> <p>For example, if you click the tick icon for Initial Review for Laura Brown it will take you directly to the details of her Initial Review.</p> 
11.	<p>To return to the dashboard click QUB RSL Supervisor Dashboard</p> <p>QUB RSL Supervisor Dashboard</p>
12.	<p>Click the Overdue graphic.</p> 
13.	<p>If a student has more than one instance, you may be brought to the search screen.</p> <p>Click the Search button.</p> 
14.	<p>The dashboard also provides access to Records of Formal meetings.</p> <p>The dashboard will indicate the number of submitted meetings for the current term.</p> <p>Click the appropriate link.</p>

Step	Action
15.	<p>If there is more than one meeting, the search screen will display.</p> <p>Click the Search button.</p> 
16.	<p>All Records of Formal Meetings will be displayed. They are numbered and listed by Academic Year:</p> <p>2161 - Academic year 2016/2017</p> <p>2171 - Academic year 2017/2018</p> <p>2181 - Academic year 2018/2019</p>
17.	<p>Click the appropriate term and meeting number.</p> 
18.	<p>In the dashboard, there is the facility to download the information to a spreadsheet.</p> <p>Click Show All Results.</p> 



Student	Name	Role	Start	Institution	Career	Acad Prog	IR	DMF	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	Start Date	Career Abbr	Term					
1	40221840	Brown, Laura	01/09/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	1	01/09/2016	0	2171	0
2	40221840	Carmichael, James	01/10/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/10/2016	0	2171	0
3	40221838	Fitzsimons, Oisin	01/09/2016	QUB	PGR	BOR	COMPLETE	OVERDUE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0
4	40221840	Green, Julie	01/10/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	0	01/10/2016	0	2171	0
5	40221900	Heanes, Georgia	01/09/2017	QUB	PGR	BOR	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2017	0	2171	0
6	40221840	Johnson, Gordon	01/09/2016	QUB	PGR	BOR	OVERDUE	COMPLETE	OVERDUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	1	01/09/2016	0	2171	0
7	40221840	Logan, Patrick	01/09/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	OVERDUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0
8	40221837	Logan, Anna	01/09/2016	QUB	PGR	BOR	COMPLETE	OVERDUE	OVERDUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0
9	40221841	Lynch, Gemma	01/09/2016	QUB	PGR	BOR	COMPLETE	OVERDUE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE	0	01/09/2016	0	2171	0
10	40221847	Moynihan, Daniel	01/09/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0
11	40221840	O'Hara, Pádraig	01/09/2016	QUB	PGR	BOR	COMPLETE	OVERDUE	OVERDUE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0
12	40221840	Phillips, Grace	01/09/2016	QUB	PGR	BOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE	0	01/09/2016	0	2171	0

Step	Action
19.	<p>This will display the data in a format that can be downloaded to a spreadsheet.</p> <p>Point to the Excel Spreadsheet link.</p>



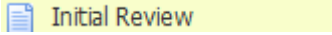
Step	Action
20.	The Supervisor Dashboard also includes information of students on leave of absence. If recorded, this will also include information on the proposed date of return.
21.	You have now completed this topic. End of Procedure.

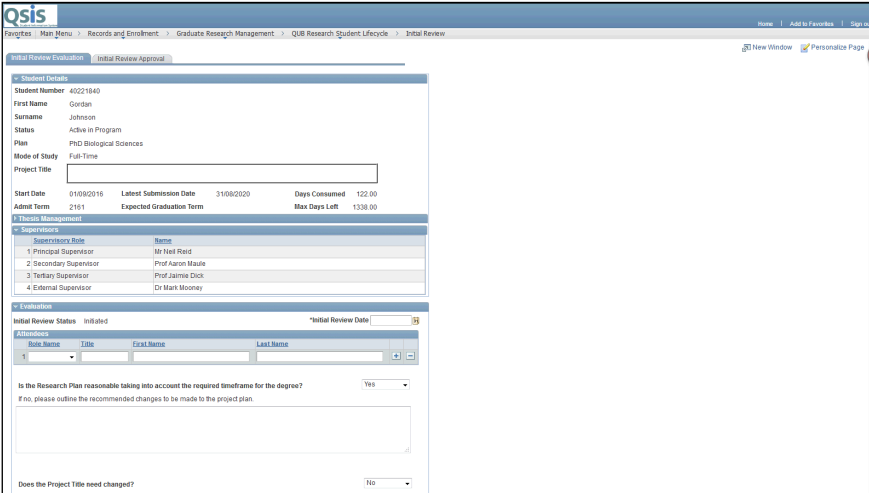
2. Adding data to Initial Review/ Differentiation

Each research student will have an Initial Review and Differentiation. The Research Student Lifecycle provides the facility to add these to Qsis.

Once added, these become available for students, supervisors and administrative staff to view.

Step	Action
1.	Click Main Menu Main_Menu
2.	Click Records and Enrollment. Records and Enrollment
3.	Click Graduate Research Management. Graduate Research Management
4.	Click QUB Research Student Lifecycle. QUB Research Student Lifecycle

Step	Action
5.	<p>Decision: Please make a selection from the options listed below.</p> <ul style="list-style-type: none"> • Adding data to Initial Review Go to step 6 • Adding data to Differentiation Go to step 25
6.	<p>Click Initial Review.</p> 
7.	<p>Click in the Empl ID: field. This is the field in Qsis for the student number.</p> <p>Enter the student number.</p> <input data-bbox="450 667 740 712" type="text"/>
8.	Click Search



The screenshot shows the 'Initial Review Approval' form in the Qsis system. The 'Initial Review Date' field is highlighted in yellow. The form includes sections for Student Details, Supervisors, and a table of attendees.

Supervisor Role	Name
1 Principal Supervisor	Mr Neil Reid
2 Secondary Supervisor	Prof Aaron Maule
3 Tertiary Supervisor	Prof James Dick
4 External Supervisor	Dr Mark Mooney

Attendee	Role Name	Title	First Name	Last Name
1				

Step	Action
9.	<p>Click in the Initial Review Date field.</p> <p>Add the date of the Initial Review. This should be the actual date the Initial Review took place.</p> <input data-bbox="450 1574 603 1619" type="text"/>

Qsis
 Home | Add to Favorites | Sign out

Records and Enrollment > Graduate Research Management > Q&B Research Student Lifecycle > Initial Review

Initial Review Evaluation Initial Review Approval

Student Details

Student Number: 40221840
 First Name: Gordon
 Surname: Johnson
 Status: Active in Program
 Plan: PhD Biological Sciences
 Mode of Study: Full-Time
 Project Title:

Start Date: 01/09/2016 Latest Submission Date: 31/08/2020 Days Consumed: 122.00
 Adm. Term: 2161 Expected Graduation Term: Max Days Left: 1338.00

Supervisors

Evaluation

Initial Review Status: Initiated *Initial Review Date: 20/09/2017

Attendees	Role Name	Title	First Name	Last Name
1				

Is the Research Plan reasonable taking into account the required timeframe for the degree? No

If no, please outline the recommended changes to be made to the project plan.
 If 'no' is selected the supervisor should outline the recommended changes in this field.

Does the Project Title need changing? No

If yes, please confirm the new Project Title

Step	Action
10.	For each milestone, it is necessary to add the attendees. Click the drop-down list.

Qsis
 Home | Add to Favorites | Sign out

Records and Enrollment > Graduate Research Management > Q&B Research Student Lifecycle > Initial Review

Initial Review Evaluation Initial Review Approval

Student Details

Student Number: 40221840
 First Name: Gordon
 Surname: Johnson
 Status: Active in Program
 Plan: PhD Biological Sciences
 Mode of Study: Full-Time
 Project Title:

Start Date: 01/09/2016 Latest Submission Date: 31/08/2020 Days Consumed: 122.00
 Adm. Term: 2161 Expected Graduation Term: Max Days Left: 1338.00

Supervisors

Evaluation

Initial Review Status: Initiated *Initial Review Date: 20/09/2017

Attendees	Role Name	Title	First Name	Last Name
1	Attendee			

Is the Research Plan reasonable taking into account the required timeframe for the degree? No

If no, please outline the recommended changes to be made to the project plan.
 If 'no' is selected the supervisor should outline the recommended changes in this field.

Does the Project Title need changing? No

If yes, please confirm the new Project Title

Step	Action
11.	Select either Chair or Attendee from the list.

Qsis
 Home | Add to Favorites | Sign out

Programs | Main Menu | Records and Enrollment | Graduate Research Management | Q&R Research Student Lifecycle | Initial Review

Initial Review Evaluation | Initial Review Approval

Student Details

Student Number: 40221840
 First Name: Gordon
 Surname: Johnson
 Status: Active in Program
 Plan: PhD Biological Sciences
 Mode of Study: Full-Time
 Project Title:

Start Date: 01/09/2016 Latest Submission Date: 31/08/2020 Days Consumed: 122.00
 Admit Term: 2151 Expected Graduation Term: Max Days Left: 1338.00

Thesis Management

Supervisors

Evaluation

Initial Review Status: Initiated *Initial Review Date: 20/09/2017

Attendee	Role Name	Title	First Name	Last Name
1	Attendee			

Is the Research Plan reasonable taking into account the required timeframe for the degree? No

If no, please outline the recommended changes to be made to the project plan.
 If 'no' is selected the supervisor should outline the recommended changes in this field

Does the Project Title need changed? No

If yes, please confirm the new Project Title

Step	Action
12.	Add the title, first and last name .

Qsis
 Home | Add to Favorites | Sign out

Programs | Main Menu | Records and Enrollment | Graduate Research Management | Q&R Research Student Lifecycle | Initial Review

Initial Review Evaluation | Initial Review Approval

Student Details

Student Number: 40221840
 First Name: Gordon
 Surname: Johnson
 Status: Active in Program
 Plan: PhD Biological Sciences
 Mode of Study: Full-Time
 Project Title:

Start Date: 01/09/2016 Latest Submission Date: 31/08/2020 Days Consumed: 122.00
 Admit Term: 2151 Expected Graduation Term: Max Days Left: 1338.00

Thesis Management

Supervisors

Supervisory Role	Name
1. Principal Supervisor	Mr Neil Reid
2. Secondary Supervisor	Prof James Maule
3. Tertiary Supervisor	Prof James Dick
4. External Supervisor	Dr Mark Mooney

Evaluation

Initial Review Status: Initiated *Initial Review Date: 20/09/2017

Attendee	Role Name	Title	First Name	Last Name
1	Attendee	Mrs	Joanne	Maguire


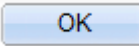
Is the Research Plan reasonable taking into account the required timeframe for the degree? Yes

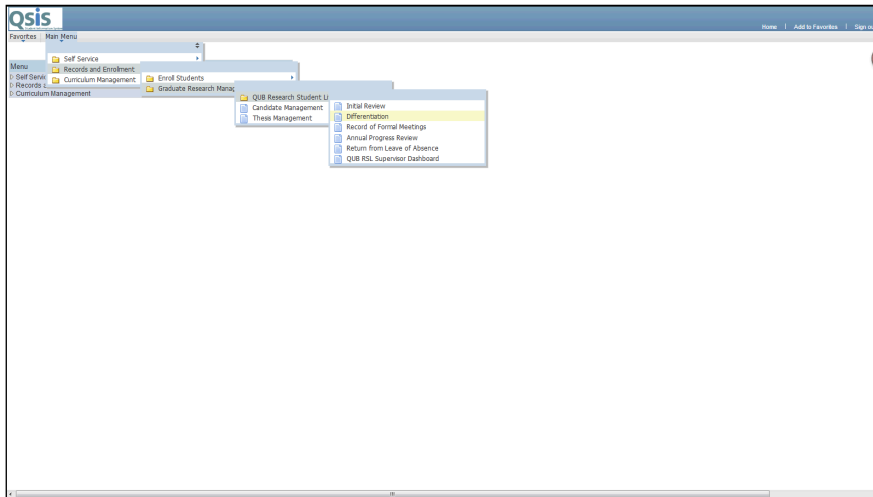
If no, please outline the recommended changes to be made to the project plan.






Does the Project Title need changed? No


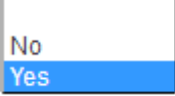
If yes, please confirm the new Project Title

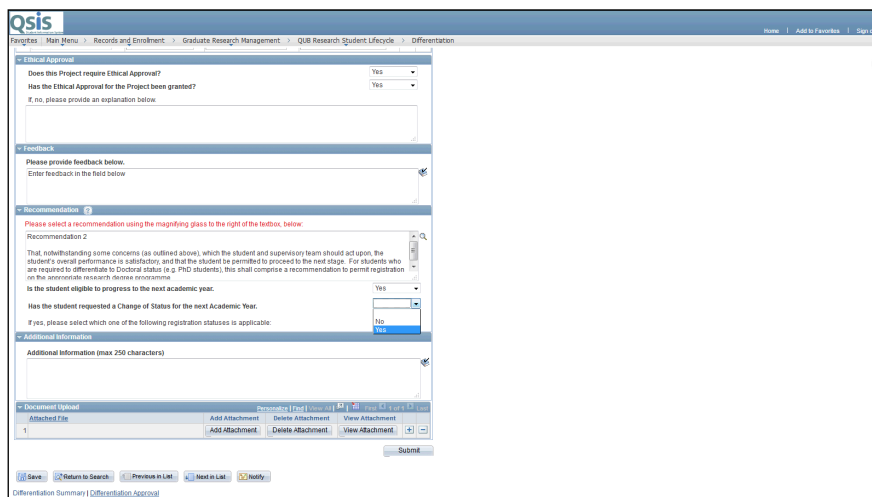
Step	Action
13.	If there was more than one attendee present, click Add a new row button.
14.	Add the details of the second attendee. Add further attendees if required.
15.	In the field, "Is the Research Plan reasonable taking into account the required timeframe for the degree" select either Yes or No .

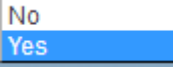
Step	Action
16.	<p>It is only necessary to fill in the text box if you have selected No in the box above.</p> <p>Point to the field and add the data or move on to the next field.</p>
17.	<p>In the field, "Does the Project Title need changed" select either Yes or No.</p> <p>If Yes, enter the new title in the next field.</p> <p>In the field "Are the appropriate resources in place?" select either Yes or No.</p> <p>If No, provide an explanation in the field underneath.</p>
18.	<p>Enter a recommendation to be considered by the supervisor's team in preparation for differentiation.</p> <p>There is a spell check attached to each of the text fields.</p>
19.	<p>If necessary, add one or more attachments.</p> <p>Click the Plus button under the heading Document Upload. Select your file and Upload.</p> 
20.	<p>Once you are satisfied with the all the data in the form, click the Submit button.</p> <p>If you are not ready to submit, you can Save the data and submit later.</p>
21.	<p>You will need to confirm you have uploaded all the relevant documentation.</p> <p>Click the OK.button.</p> 
22.	<p>Your data will now become available to view by all users, including the student.</p>
23.	<p>The second tab contains fields that need to be completed by the Head of School or HoS Nominee.</p> <p>Once the form has been submitted, the Head of School or HoS Nominee will need to confirm if they agree with the record/recommendation on the Initial Reveiw/Evaluation Page.</p> <p>Once confirmed, the milestone will appear as completed in the various dashboards.</p>
24.	<p>You have now completed the Initial Review section of this topic.</p> <p>End of Procedure. Remaining steps apply to other paths.</p>

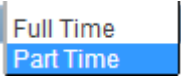


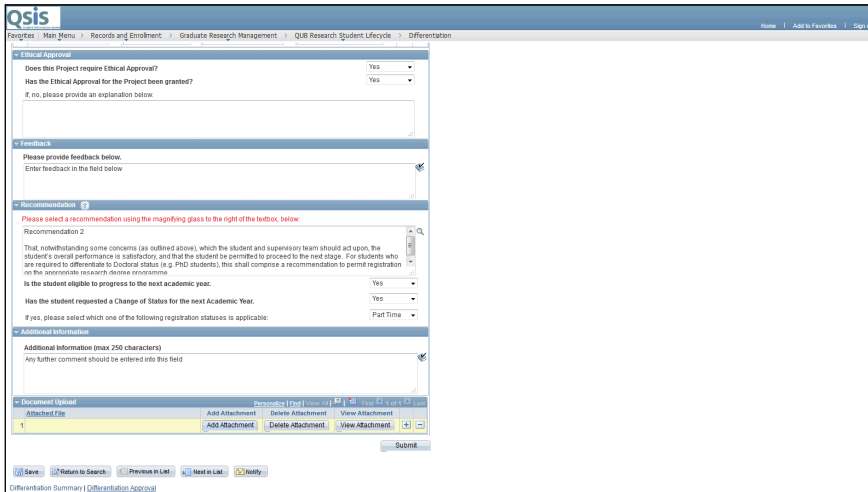
Step	Action
25.	Click Differentiation .  Differentiation
26.	When a student has more than one attempt at Differentiation, then the search page may appear. You will need to enter the student number and choose the correct entry. Click in the Empl ID field and enter the student number . <input type="text"/>
27.	If you wish to see who is currently supervising the student, click the Expand section Supervisors arrow. 
28.	Click in the Date of Review field and add the actual date the Differentiation took place. Select the correct Term . It will default to the 'current' Term. If incorrect, use the spyglass look up and choose the correct Term. The Number of Attempts will default to 1 (read only). <input type="text"/>  *Term <input type="text" value="2161"/>  Number of Attempts 1
29.	For each milestone, it is necessary to add the attendees. Click in the Role Name field to view the types of roles. Choose either Chair or Attendee . <input type="text" value="Attendee"/> <input type="text" value="Chair"/>
30.	Add the Title, First and Last name. Click the Add a new row arrow. 
31.	Add all the attendees.

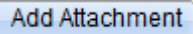
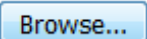

Step	Action										
32.	You will need to select either Yes or No in the Ethical Approval box. You only need to provide additional information if the project requires ethical approval and this has not yet been granted.										
33.	Enter feedback in the appropriate box. There is a spell check attached to each of the text fields.										
34.	There are a set of standard recommendations. To access the standard recommendations, click the magnifying glass graphic. 										
35.	Select the appropriate Recommendation . <table border="1" data-bbox="354 712 1120 896"> <tr> <td>1</td> <td>Recommendation 1: Satisfactory - Proceed</td> </tr> <tr> <td>2</td> <td>Recommendation 2: Concerns - Proceed</td> </tr> <tr> <td>3</td> <td>Recommendation 3: Unsatisfactory - Reassess</td> </tr> <tr> <td>4</td> <td>Recommendation 4: Unsatisfactory - Change Programme</td> </tr> <tr> <td>5</td> <td>Recommendation 5: Unsatisfactory - Terminate</td> </tr> </table>	1	Recommendation 1: Satisfactory - Proceed	2	Recommendation 2: Concerns - Proceed	3	Recommendation 3: Unsatisfactory - Reassess	4	Recommendation 4: Unsatisfactory - Change Programme	5	Recommendation 5: Unsatisfactory - Terminate
1	Recommendation 1: Satisfactory - Proceed										
2	Recommendation 2: Concerns - Proceed										
3	Recommendation 3: Unsatisfactory - Reassess										
4	Recommendation 4: Unsatisfactory - Change Programme										
5	Recommendation 5: Unsatisfactory - Terminate										
36.	The text for the selected recommendation will appear in the textbox. Select whether the student is eligible to progress to the next academic year. 										



Step	Action
37.	Select whether the student has requested a change of status for the next Academic Year e.g. from full time to part time. Select either Yes or No . 

Step	Action
38.	If required, select either Full Time or Part Time . 
39.	There is a facility to add additional information. Note this field is maximum 250 characters.


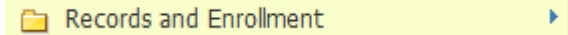
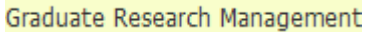
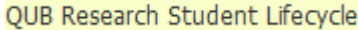
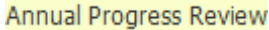
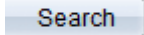
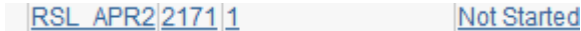

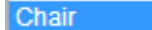





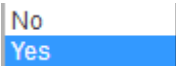
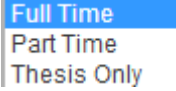
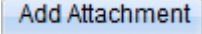
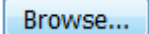

Step	Action
40.	There is also the facility to add additional information through attachments. Click the Add Attachment button. 
41.	Click the Browse button and find the file on your computer. 
42.	Once you have found the file, click the Upload button. 
43.	Once you are satisfied with all the data entered, click the Submit button. If you are not ready to submit, you can Save your data without submitting.
44.	You have now completed the Differentiation section of this topic. End of Procedure.


3. Adding data to the APR section

A student will have an Annual Progress Review for each academic year. The Research Student Lifecycle provides the facility to add these to Qsis.

Once added, these become available for students, supervisors and administrative staff to view.


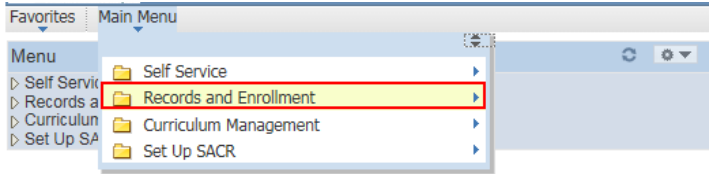
Step	Action
1.	Click Main Menu 
2.	Click Records and Enrollment 
3.	Click Graduate Research Management 
4.	Click QUB Research Student Lifecycle 
5.	Click Annual Progress Review 
6.	Enter the student number in the Empl ID field Or: Click Search to reveal a list of all students where you have been assigned as a supervisor.
7.	Click the Search button. 
8.	This will reveal a list of all the Annual Progress Review milestones that have been assigned to the student. Click the appropriate row. 
9.	Click in the Date of Review field and add the actual date the APR took place. Select the correct Term . It will default to the 'current' term. If incorrect, use the look up spyglass and choose the correct term The Number of Attempts will default to 1 (read only).
10.	For each milestone it is necessary to add all attendees. Click in the Role Name field to view the types of roles. 
11.	Click either Chair or Attendee 
12.	To add additional panel members, click the Add a new row plus button. 

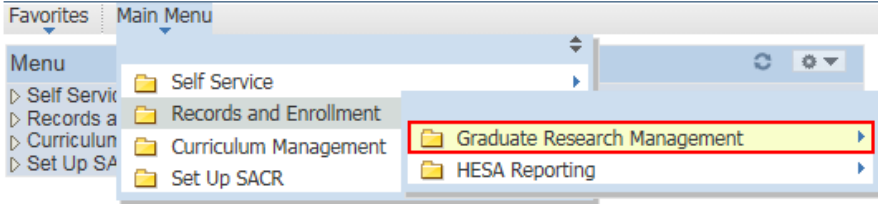
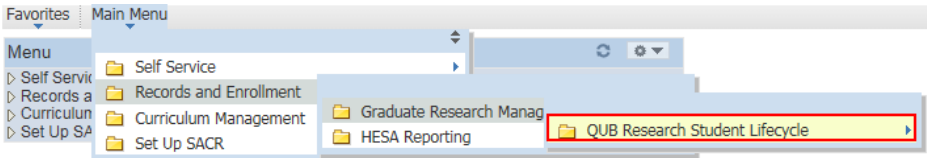
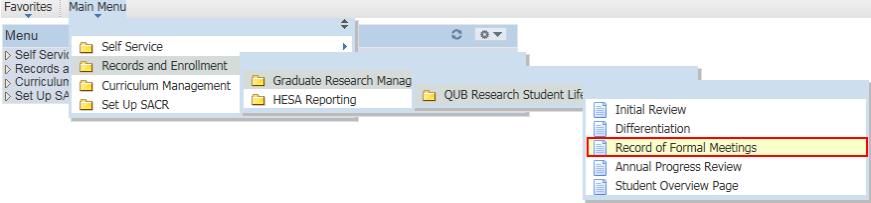
Step	Action
13.	You are required to add the details of all the panel members. There must be at a minimum of the Chair and one attendee.
14.	You will need to select either Yes or No in the Ethical Approval box. Answering 'Yes / No' at respective questions will result in the text field either becoming not editable or mandatory.
15.	Enter feedback in the appropriate box.
16.	There is a spell check attached to each of the text fields.
17.	It is necessary to add a recommendation. There are a set of standard recommendations. To access the standard recommendations, click the magnifying glass graphic. 
18.	Select the appropriate Recommendation .
19.	The text for the selected recommendation will appear in the textbox. Select whether the student is eligible to progress to the next academic year. Click the list. 
20.	Select whether the student has requested a change of status for the next Academic Year. Select either Yes or No . 
21.	If required, select either Full Time , Part Time or Thesis Only . 
22.	There is the facility to add additional information . Note this field is maximum 250 characters.
23.	There is also the facility to add attachments. Click the Add Attachment button. 
24.	Click the Browse button and find the file on your computer. 
25.	Once you have found the file, click the Upload button. 

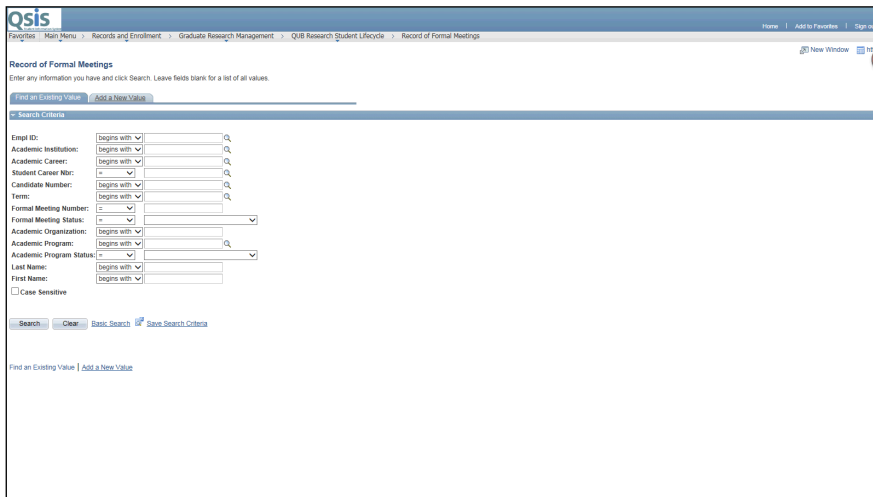
Step	Action
26.	<p>You can add more than one attachment.</p> <p>Click the Add a new row plus button.</p> 
27.	<p>Once you are satisfied with all the data entered, click the Submit button.</p> <p>If you are not ready to submit, you can Save the page.</p>
28.	<p>You will need to confirm you have uploaded all the relevant documentation.</p> <p>Click the OK.button.</p> <p>Your data will now become available to all users, including the student.</p>
29.	<p>The second tab contains fields that need to be completed by the Head of School or HoS Nominee.</p> <p>They will need to confirm if they agree with the record/recommendation on the Annual Progress Review Summary Page.</p> <p>Once this information has been submitted, the milestone will appear as completed in the various dashboards.</p>
30.	<p>You have now completed this topic.</p> <p>End of Procedure.</p>

4. Adding a Record of Formal Meeting

Both **Supervisors and Students can enter details of formal meetings** that have been held throughout a student's postgraduate research career.

Step	Action
1.	<p>To navigate in Qsis click Main Menu.</p> 
2.	<p>Click Records and Enrollment.</p> 

Step	Action
3.	<p>Click Graduate Research Management.</p> 
4.	<p>Click QUB Research Student Lifecycle.</p> 
5.	<p>Click Record of Formal Meetings.</p> 



Record of Formal Meetings

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Emp# ID: [dropdown] [clear]

Academic Institution: [dropdown] [clear]

Academic Career: [dropdown] [clear]

Student Career Nbr: [dropdown] [clear]

Candidate Number: [dropdown] [clear]

Term: [dropdown] [clear]

Formal Meeting Number: [dropdown]

Formal Meeting Status: [dropdown]

Academic Organization: [dropdown] [clear]

Academic Program: [dropdown] [clear]

Academic Program Status: [dropdown]

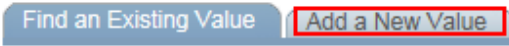
Last Name: [dropdown] [clear]

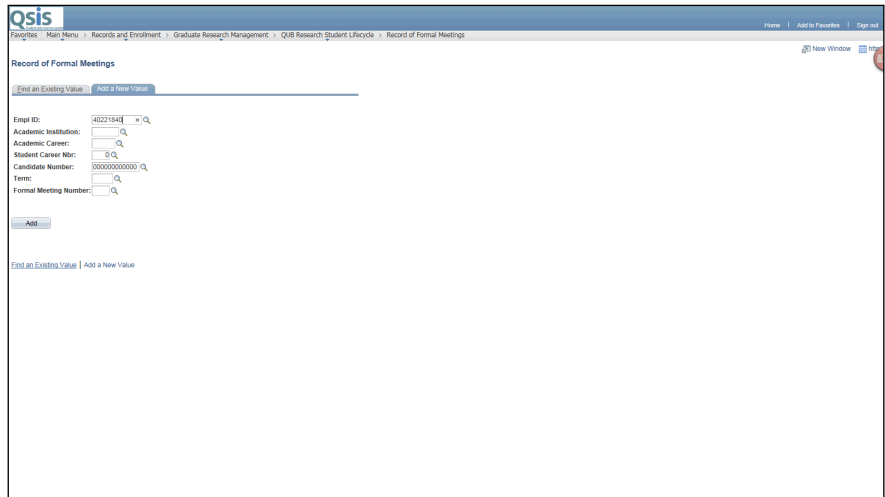
First Name: [dropdown] [clear]















Case Sensitive

Search Clear Basic Search Save Search Criteria

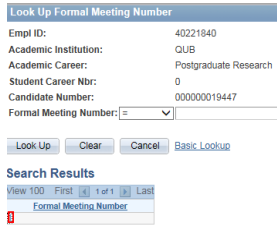
Find an Existing Value | Add a New Value

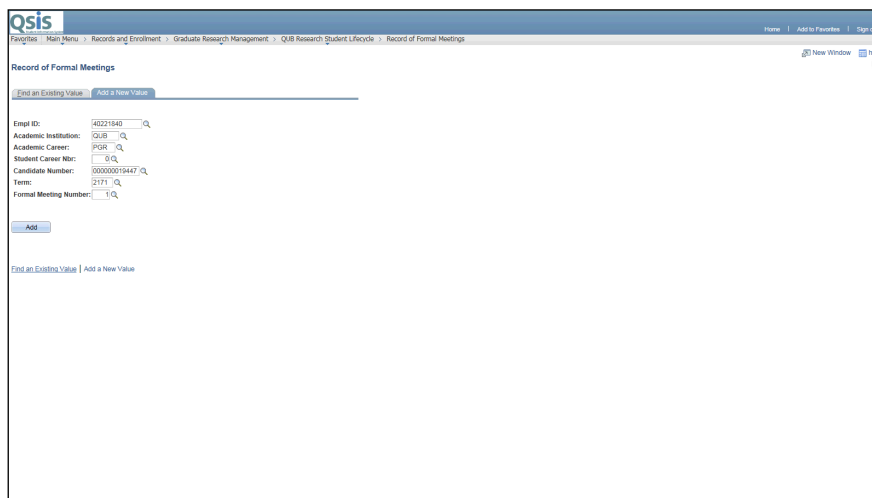
Step	Action
6.	<p>Click the Add a New Value tab.</p> 



Step	Action
7.	<p>On this page, you need to add the student's details. Add the student number.</p> <p>Next click the Look up Academic Institution spyglass button.</p> <p>Record of Formal Meetings</p> <p>Find an Existing Value Add a New Value</p> <p>Empl ID: 40221840</p> <p>Academic Institution: </p> <p>Academic Career: </p> <p>Student Career Nbr: 0 </p> <p>Candidate Number: 000000000000 </p> <p>Term: </p> <p>Formal Meeting Number: </p> <p>Add</p> <p>Find an Existing Value Add a New Value</p>
8.	<p>Click the QUB link.</p> <p>Academic Institution: begins with <input type="text"/></p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Results</p> <p>View 100 First 1 of 1 Last</p> <p>Academic Institution</p> <p></p>
9.	<p>Click the Look up Academic Career spyglass button.</p> <p>Empl ID: 40221840 </p> <p>Academic Institution: QUB </p> <p>Academic Career: </p> <p>Student Career Nbr: 0 </p> <p>Candidate Number: 000000000000 </p> <p>Term: </p> <p>Formal Meeting Number: </p>

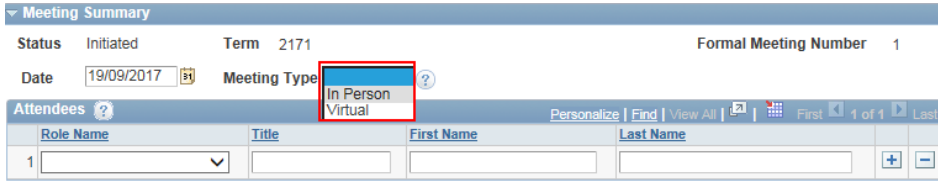
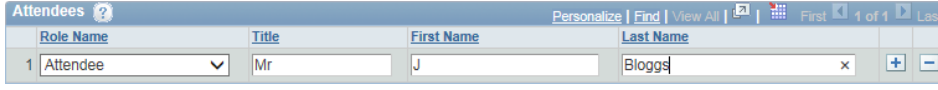
Step	Action						
10.	<p>Click the Research career.</p> <p>If the student has previously studied in Queens, you may see undergraduate or postgraduate rows in this box.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: =</p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Results</p> <p>View 100 First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Academic Career</th> </tr> </thead> <tbody> <tr> <td>Research</td> </tr> </tbody> </table>	Academic Career	Research				
Academic Career							
Research							
11.	<p>Click the Look up Candidate Number spyglass button.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: PGR Student Career Nbr: 0 Candidate Number: 000000000000 Term: Formal Meeting Number:</p> <p>Add</p>						
12.	<p>Students who have more than one postgraduate research career/ application may see more than one row.</p> <p>If you see more than one candidate number, please contact your School to ask which number to use.</p> <p>Click the Candidate Number link.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: Postgraduate Research Student Career Nbr: 0 Candidate Number: begins with</p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Results</p> <p>View 100 First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Candidate Number</th> </tr> </thead> <tbody> <tr> <td>000000019447</td> </tr> </tbody> </table>	Candidate Number	000000019447				
Candidate Number							
000000019447							
13.	<p>Click the Look up Term spyglass button.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: PGR Student Career Nbr: 0 Candidate Number: 000000019447 Term: Formal Meeting Number:</p>						
14.	<p>Click the correct Academic Year link.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: Postgraduate Research Student Career Nbr: 0 Candidate Number: 000000019447 Term: begins with Description: begins with</p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Results</p> <p>View 100 First 1 of 2 Last</p> <table border="1"> <thead> <tr> <th>Term</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>2161</td> <td>Academic Year 2016/17</td> </tr> <tr> <td>2171</td> <td>Academic Year 2017/18</td> </tr> </tbody> </table>	Term	Description	2161	Academic Year 2016/17	2171	Academic Year 2017/18
Term	Description						
2161	Academic Year 2016/17						
2171	Academic Year 2017/18						

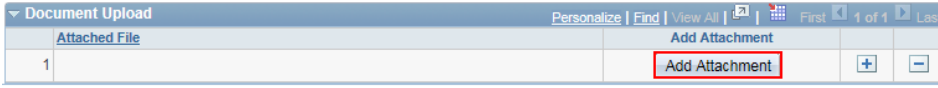
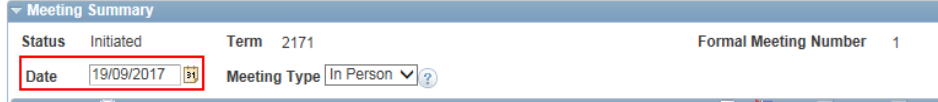
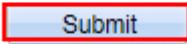
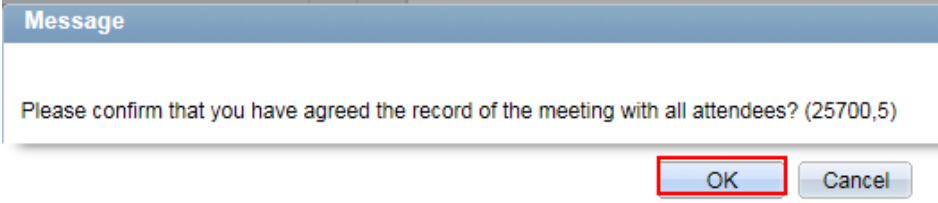
Step	Action
15.	<p>Click the Look up Formal Meeting Number spyglass button.</p> <p>Empl ID: <input type="text" value="40221840"/> </p> <p>Academic Institution: <input type="text" value="QUB"/> </p> <p>Academic Career: <input type="text" value="PGR"/> </p> <p>Student Career Nbr: <input type="text" value="0"/> </p> <p>Candidate Number: <input type="text" value="00000019447"/> </p> <p>Term: <input type="text" value="2171"/> </p> <p>Formal Meeting Number: <input type="text"/> </p>
16.	<p>This page will only ever show one value. This will be the next meeting that needs to be added.</p> <p>In this instance, the first Record of Formal Meeting for the academic year will be selected.</p> <p>Click the 1 link.</p> 



Step	Action
17.	<p>Once all the values have been added, click the Add button</p> <p>Record of Formal Meetings</p> <p><input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/></p> <p>Empl ID: <input type="text" value="40221840"/> </p> <p>Academic Institution: <input type="text" value="QUB"/> </p> <p>Academic Career: <input type="text" value="PGR"/> </p> <p>Student Career Nbr: <input type="text" value="0"/> </p> <p>Candidate Number: <input type="text" value="00000019447"/> </p> <p>Term: <input type="text" value="2171"/> </p> <p>Formal Meeting Number: <input type="text" value="1"/> </p> <p><input type="button" value="Add"/></p>

Step	Action
18.	<p>The Record of Formal Meetings page will open.</p> <p>The information at the top will be read only.</p> <p>The user is required to add information under the heading Meeting Summary.</p>

Step	Action
19.	<p>Click the Meeting Type list and select either In Person or Virtual depending on how the meeting was conducted.</p> 
20.	<p>The next step is to add the attendees.</p> <p>Click the Role Name and select either Attendee or Chair.</p> <p>Add the Title, First and Last Name.</p>
21.	<p>Press the Plus button to add further attendees.</p> 
22.	<p>It is necessary to have at least two attendees including the student.</p> <p>It is not necessary to have a Chair.</p>
23.	<p>Enter the summary of the meeting in the first field.</p> <p>Enter the agreed actions and next steps in the second field</p>

Step	Action
24.	<p>If required, you can add attachments.</p> <p>Point to the Add Attachment button and locate the required file.</p> 
25.	<p>Make sure that you check the date before you submit. This will default to the date that the form is being filled in.</p> <p>However, it should reflect the actual date of the meeting.</p> <p>Select the Date field and enter the correct date. The date format will be the standard UK format. However, it may display in the American format according to the defaults on your machine.</p> 
26.	<p>It is important that the content has been agreed by all attendees prior to submitting.</p> <p>If you are not 100 % certain, click the Save button and ask the other attendee(s) to login to Qsis to check the data.</p> <p>Once you are satisfied with all the data entered, click the Submit button.</p> 
27.	<p>You will be asked to confirm that the content you have added has been agreed.</p> <p>If appropriate, click the OK field.</p> 
28.	<p>Once you submit, the page will become read-only for the student, supervisor(s) and administrative staff.</p> <p>All users can also download any attachments.</p>
29.	<p>You can view all saved or submitted Records of Formal Meetings.</p> <p>Saved, but not submitted, meeting records will show with a status of Initiated.</p>
30.	<p>You have now completed this topic.</p> <p>End of Procedure.</p>