

# Research Student Lifecycle

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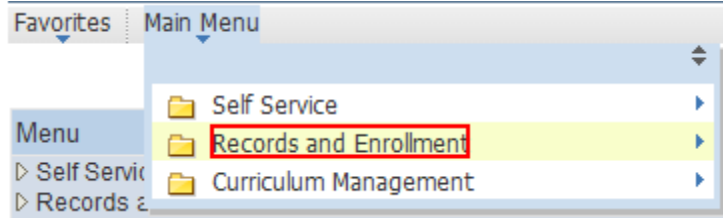
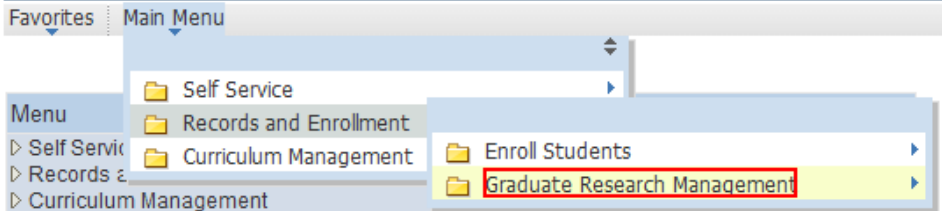
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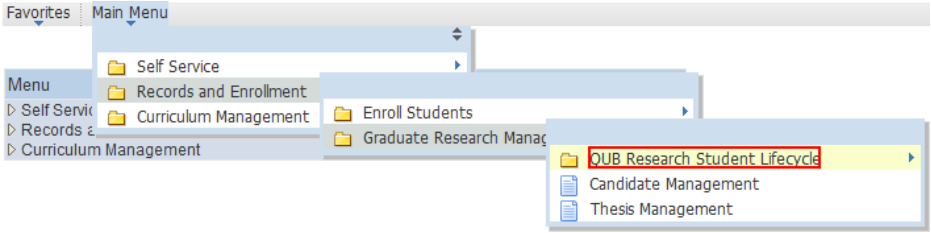
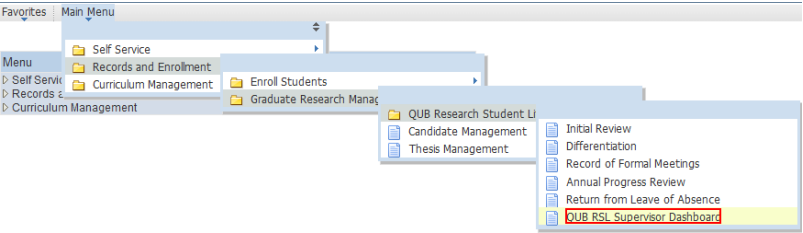
## Supervisors – Research Student Lifecycle

### 1. Supervisor Dashboard


From October 2017, all research supervisors will have access to a 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.	<p><b>Login</b> to Qsis.</p> <p>Click <b>Main Menu</b>.</p> 
2.	<p>Click <b>Records and Enrollment</b>.</p> 
3.	<p>Click <b>Graduate Research Management</b>.</p> 

Step	Action
4.	<p>Click <b>QUB Research Student Lifecycle</b>.</p> 
5.	<p>Click <b>QUB RSL Supervisor Dashboard</b>.</p> 
6.	<p>The QUB RSL Supervisor Dashboard consists of 3 panes:</p> <ul style="list-style-type: none"> <li>- Students on Leave of Absence</li> <li>- Visual view of the progress of active students</li> <li>- Qsis Links for Supervisors</li> </ul>
7.	<p>The key milestones are listed for each student.</p> <p><b>IR</b> = Initial Review</p> <p><b>Diff</b> = Differentiation</p> <p><b>APR1- APR8</b> - Annual Progress Reviews</p> <p>Full time students will typically have 3-4 APRs attached while part-time students will have up to 8.</p>
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"> <li>- Principal Supervisor</li> <li>- Secondary Supervisor</li> <li>- Tertiary Supervisor</li> <li>- Co-Supervisor</li> <li>- External Supervisor</li> <li>- RSL Panel Member</li> </ul>

Step	Action																																																																								
9.	<p>Each milestone is represented by one of five icons:</p> <ul style="list-style-type: none"><li>- Complete</li><li>- Not Due Yet</li><li>- Due Soon (next 30 days)</li><li>- Overdue</li><li>- Not Required</li></ul> <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 <b>Quick links</b> that take you directly to a specific milestone.</p> <p>For example, if you click the <b>tick</b> icon for Initial Review for Laura Brown it will take you directly to the details of her Initial Review.</p> <table><thead><tr><th>Student</th><th>Name</th><th>Role</th><th>Start</th><th>IR</th><th>Diff</th><th>APR 1</th><th>APR 2</th><th>APR 3</th><th>APR 4</th><th>APR 5</th><th>APR 6</th></tr></thead><tbody><tr><td>40221843</td><td>Brown,Laura</td><td>RSL Panel Member</td><td>01/09/2016</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>-</td></tr><tr><td>40221842</td><td>Carmichael,James</td><td>Secondary Supervisor</td><td>01/10/2016</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>-</td></tr><tr><td>40221838</td><td>Fitzsimons,Oisin</td><td>External Supervisor</td><td>01/09/2016</td><td></td><td></td><td></td><td>-</td><td>-</td><td>-</td><td>-</td><td>-</td></tr><tr><td>40221848</td><td>Green,Julie</td><td>RSL Panel Member</td><td>01/10/2016</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>-</td></tr><tr><td>40221900</td><td>Heaney,Georgia</td><td>Principal Supervisor</td><td>01/09/2017</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>-</td></tr></tbody></table>	Student	Name	Role	Start	IR	Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	40221843	Brown,Laura	RSL Panel Member	01/09/2016								-	40221842	Carmichael,James	Secondary Supervisor	01/10/2016								-	40221838	Fitzsimons,Oisin	External Supervisor	01/09/2016				-	-	-	-	-	40221848	Green,Julie	RSL Panel Member	01/10/2016								-	40221900	Heaney,Georgia	Principal Supervisor	01/09/2017								-
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11.	<p>To return to the dashboard click <b>QUB RSL Supervisor Dashboard</b></p> <p>Graduate Research Management &gt; QUB Research Student Lifecycle &gt; <b>QUB RSL Supervisor Dashboard</b> &gt; Initial Review</p>																																																																								
12.	<p>In some instances you may not be brought directly to the page.</p> <p>Click the <b>Overdue</b> graphic for Anna Logue.</p> <table><thead><tr><th>Start</th><th>IR</th><th>Diff</th><th>APR 1</th></tr></thead><tbody><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/10/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/10/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2017</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr><tr><td>01/09/2016</td><td></td><td></td><td></td></tr></tbody></table>	Start	IR	Diff	APR 1	01/09/2016				01/10/2016				01/09/2016				01/10/2016				01/09/2017				01/09/2016				01/09/2016				01/09/2016				01/09/2016				01/09/2016				01/09/2016				01/09/2016				01/09/2016																			
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13.	<p>If a student has more than one instance, you may be brought to the search screen.</p> <p>Click the <b>Search</b> button.</p> <div><div>empty box</div><div>begin with <input type="text" value="000000019444"/></div><div>Academic Institution: <input type="text" value="QUB"/></div><div>Academic Career: <input type="text" value="Postgraduate Research"/></div><div>Student Career Nbr: <input type="text" value=""/></div><div>Candidate Number: <input type="text" value=""/></div><div>Number of Attempts: <input type="text" value=""/></div><div>Term: <input type="text" value=""/></div><div>Differentiation Status: <input type="text" value=""/></div><div>Academic Organization: <input type="text" value=""/></div><div>Academic Program: <input type="text" value="BIOR"/></div><div>Academic Program Status: <input type="text" value=""/></div><div>Last Name: <input type="text" value=""/></div><div>First Name: <input type="text" value=""/></div><div><input type="checkbox"/> Case Sensitive</div><div><input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/></div></div>																																																																								

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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 <b>appropriate</b> link.</p> <table><tr><td>40221841</td><td>Lynch,Gemma</td><td>Principal Supervisor</td><td>01/09/2016</td><td>✓</td><td>📄</td><td>✓</td><td>✓</td><td>📄</td><td>📄</td><td>📄</td><td>-</td><td>-</td><td>-</td><td>0</td></tr><tr><td>40221847</td><td>Morgan,Daniel</td><td>RSL Panel Member</td><td>01/09/2016</td><td>✓</td><td>✓</td><td>✓</td><td>📄</td><td>📄</td><td>📄</td><td>📄</td><td>-</td><td>-</td><td>-</td><td>1</td></tr><tr><td>40221845</td><td>O'Hara,Fergal</td><td>Principal Supervisor</td><td>01/09/2016</td><td>✓</td><td>📄</td><td>📄</td><td>✓</td><td>📄</td><td>📄</td><td>📄</td><td>-</td><td>-</td><td>-</td><td>0</td></tr><tr><td>40221846</td><td>Phillips,Grace</td><td>Principal Supervisor</td><td>01/09/2016</td><td>✓</td><td>✓</td><td>✓</td><td>📄</td><td>📄</td><td>📄</td><td>📄</td><td>-</td><td>-</td><td>-</td><td>0</td></tr></table>	40221841	Lynch,Gemma	Principal Supervisor	01/09/2016	✓	📄	✓	✓	📄	📄	📄	-	-	-	0	40221847	Morgan,Daniel	RSL Panel Member	01/09/2016	✓	✓	✓	📄	📄	📄	📄	-	-	-	1	40221845	O'Hara,Fergal	Principal Supervisor	01/09/2016	✓	📄	📄	✓	📄	📄	📄	-	-	-	0	40221846	Phillips,Grace	Principal Supervisor	01/09/2016	✓	✓	✓	📄	📄	📄	📄	-	-	-	0																		
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16.	<p>All Records of Formal Meetings will be displayed. They are numbered and listed by Academic Year:</p> <p><b>2171</b> - Academic year 2017/2018</p> <p><b>2181</b> - Academic year 2018/2019</p>																																																																														
17.	<p>Click the <b>appropriate term and meeting number</b>.</p> <p>Search Results</p> <table><tr><td colspan="14">View All</td><td>First</td><td>1 of 3</td><td>⌵</td><td>Last</td></tr><tr><th>EmpID</th><th>ID</th><th>Academic Institution</th><th>Academic Career</th><th>Student Career</th><th>IBR</th><th>Candidate Number</th><th>Term</th><th>Formal Meeting Number</th><th>Formal Meeting Status</th><th>Academic Organization</th><th>Academic Program</th><th>Academic Program Status</th><th>Last Name</th><th>First Name</th></tr><tr><td>40221847</td><td>QUB</td><td>PGR</td><td>0</td><td></td><td></td><td>000000018454</td><td>2181.1</td><td>Submitted</td><td>SBIO</td><td>BIOR</td><td>Active</td><td></td><td>MORGAN</td><td>DANIEL</td></tr><tr><td>40221847</td><td>QUB</td><td>PGR</td><td>0</td><td></td><td></td><td>000000018454</td><td>2181.2</td><td>Submitted</td><td>SBIO</td><td>BIOR</td><td>Active</td><td></td><td>MORGAN</td><td>DANIEL</td></tr><tr><td>40221847</td><td>QUB</td><td>PGR</td><td>0</td><td></td><td></td><td>000000018454</td><td>2181.3</td><td>Submitted</td><td>SBIO</td><td>BIOR</td><td>Active</td><td></td><td>MORGAN</td><td>DANIEL</td></tr></table>	View All														First	1 of 3	⌵	Last	EmpID	ID	Academic Institution	Academic Career	Student Career	IBR	Candidate Number	Term	Formal Meeting Number	Formal Meeting Status	Academic Organization	Academic Program	Academic Program Status	Last Name	First Name	40221847	QUB	PGR	0			000000018454	2181.1	Submitted	SBIO	BIOR	Active		MORGAN	DANIEL	40221847	QUB	PGR	0			000000018454	2181.2	Submitted	SBIO	BIOR	Active		MORGAN	DANIEL	40221847	QUB	PGR	0			000000018454	2181.3	Submitted	SBIO	BIOR	Active		MORGAN	DANIEL
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20.	<p>This will display the data in a format that can be downloaded to a spreadsheet.</p> <p>Point to the <b>Excel Spreadsheet</b> link.</p> <p>Download results in: <a href="#">Excel Spreadsheet</a> <a href="#">CSV Text File</a> <a href="#">XML File</a> (9 kb)</p> <p>View All</p> <table><tr><th></th><th>Student</th><th>Name</th><th>Role</th><th>Start</th><th>Institution</th><th>Career</th><th>Acad Prog</th><th>IR</th><th>Diff</th><th>APR 1</th><th>APR 2</th></tr><tr><td>1</td><td>40221843</td><td>Brown,Laura</td><td>RSL Panel Member</td><td>01/09/2016</td><td>QUB</td><td>PGR</td><td>BIOR</td><td>COMPLETE</td><td>COMPLETE</td><td>COMPLETE</td><td>NOT_DUE</td></tr><tr><td>2</td><td>40221842</td><td>Carmichael,James</td><td>Secondary Supervisor</td><td>01/10/2016</td><td>QUB</td><td>PGR</td><td>BIOR</td><td>COMPLETE</td><td>COMPLETE</td><td>COMPLETE</td><td>NOT_DUE</td></tr><tr><td>3</td><td>40221838</td><td>Fitzsimons,Oisín</td><td>External Supervisor</td><td>01/09/2016</td><td>QUB</td><td>PGR</td><td>BIOR</td><td>COMPLETE</td><td>OVERDUE</td><td>COMPLETE</td><td>NOT_REQUIREC</td></tr><tr><td>4</td><td>40221848</td><td>Green,Julie</td><td>RSL Panel Member</td><td>01/10/2016</td><td>QUB</td><td>PGR</td><td>BIOR</td><td>COMPLETE</td><td>COMPLETE</td><td>COMPLETE</td><td>COMPLETE</td></tr><tr><td>5</td><td>40221900</td><td>Heaney,Georgia</td><td>Principal Supervisor</td><td>01/09/2017</td><td>QUB</td><td>PGR</td><td>BIOR</td><td>NOT_DUE</td><td>NOT_DUE</td><td>NOT_DUE</td><td>NOT_DUE</td></tr></table>		Student	Name	Role	Start	Institution	Career	Acad Prog	IR	Diff	APR 1	APR 2	1	40221843	Brown,Laura	RSL Panel Member	01/09/2016	QUB	PGR	BIOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	2	40221842	Carmichael,James	Secondary Supervisor	01/10/2016	QUB	PGR	BIOR	COMPLETE	COMPLETE	COMPLETE	NOT_DUE	3	40221838	Fitzsimons,Oisín	External Supervisor	01/09/2016	QUB	PGR	BIOR	COMPLETE	OVERDUE	COMPLETE	NOT_REQUIREC	4	40221848	Green,Julie	RSL Panel Member	01/10/2016	QUB	PGR	BIOR	COMPLETE	COMPLETE	COMPLETE	COMPLETE	5	40221900	Heaney,Georgia	Principal Supervisor	01/09/2017	QUB	PGR	BIOR	NOT_DUE	NOT_DUE	NOT_DUE	NOT_DUE
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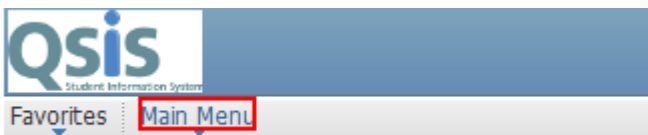
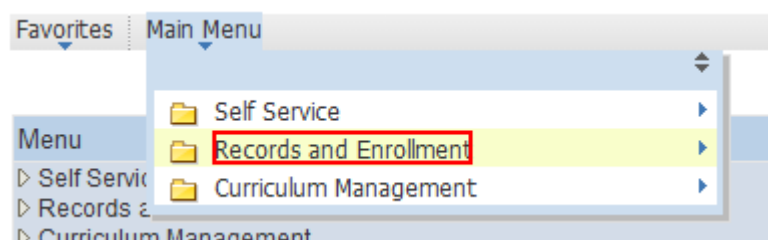
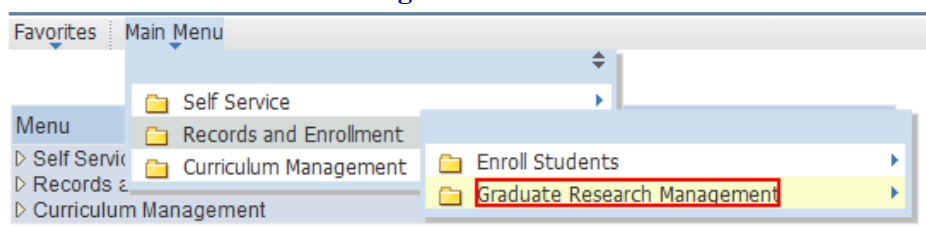
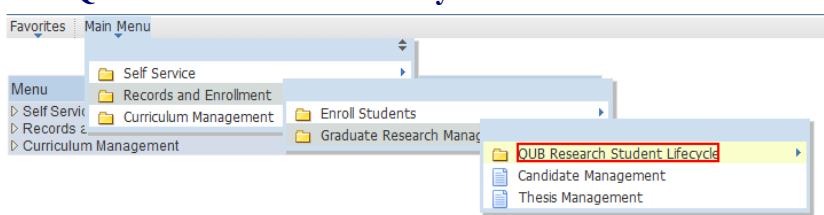
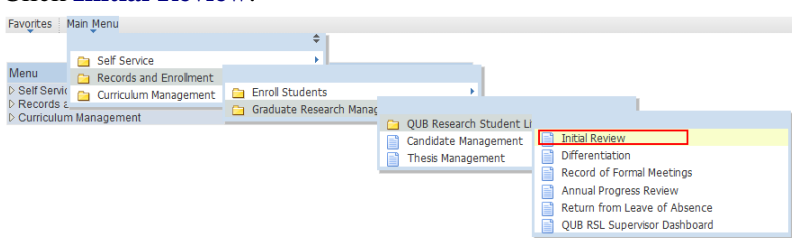
Student	Name	Role	Start	IR	Diff	APR.1	APR.2	APR.3	APR.4	APR.5	APR.6	APR.7	APR.8	Formal Meetings	ESIP Training
40221838	Fitzsimons,Oisín	Secondary Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	2	View
40221848	Green,Julie	Principal Supervisor	01/10/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	2	View
40221849	Lipson,Patrick	Principal Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	2	View
40221847	Morgan,Daniel	Principal Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	2	View
40221845	Philips,Grace	RSL Panel Member	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	2	View

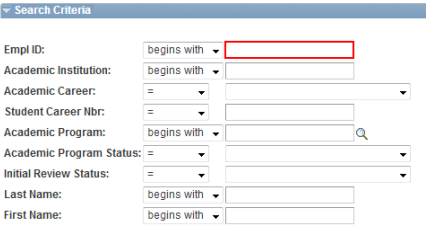
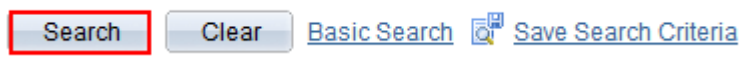
Step	Action
21.	<p>The Supervisor Dashboard also includes information of students on leave of absence.</p> <p>If recorded, this will also include information on the proposed date of return.</p>
22.	You have now completed this topic.

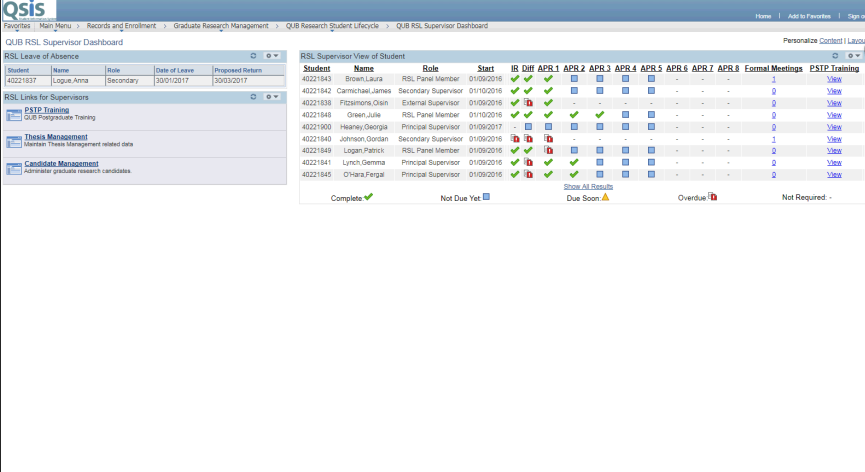
## 2. Adding data to Initial Review/ Differentiation


Research students 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 <b>Main Menu</b> 
2.	Click <b>Records and Enrollment</b> . 
3.	Click <b>Graduate Research Management</b> . 
4.	Click <b>QUB Research Student Lifecycle</b> . 
5.	Click <b>Initial Review</b> . 

Step	Action
6.	<p>Click in the <b>Empl ID:</b> field. This is the field in Qsis for the student number.</p> <p>Enter the <b>student number</b>.</p> 
7.	<p>Click <b>Search</b></p> 



Step	Action
8.	<p>The Overdue icon indicates that the Initial Review <b>has not been completed</b>.</p> <p>The icons in the dashboard will only change to completed once all steps have been completed including by the Head of School/Nominee.</p> <p>Please note that the status indicates whether the milestone has been completed or not, and <b>does not indicate</b> whether it has <b>been passed or not</b>.</p> <p>The only exception is when the recommendation <b>3 - Unsatisfactory Reassess</b> has been selected. The milestone will not appear as completed. The student will appear in a Referred list in Qsis for the Head of School/Nominee to consider.</p> <p>Click the <b>Icon</b>.</p> 



Step	Action
9.	<p>Click in the <b>Initial Review Date</b> field.</p> <p>Add the date of the Initial Review. This should be the actual date the Initial Review took place.</p>

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

**Qsis**  
 Home | Add to Favorites | Sign Out  
 Reports | Main Menu | Records and Enrollment | Graduate Research Management | QSR Research Student Lifecycle | Initial Review

Initial Review Evaluation Initial Review Approval

**Standard Details**  
 Student Number: 40221040  
 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  
 Admin Term: 2161 Expected Graduation Term: Max Days Left: 1336.00

**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 changed? No

If yes, please confirm the new Project Title

Step	Action
11.	Select either <b>Chair</b> or <b>Attendee</b> from the list.

**Qsis**  
 Home | Add to Favorites | Sign Out  
 Reports | Main Menu | Records and Enrollment | Graduate Research Management | QSR Research Student Lifecycle | Initial Review

Initial Review Evaluation Initial Review Approval

**Standard Details**  
 Student Number: 40221040  
 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  
 Admin Term: 2161 Expected Graduation Term: Max Days Left: 1336.00

**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


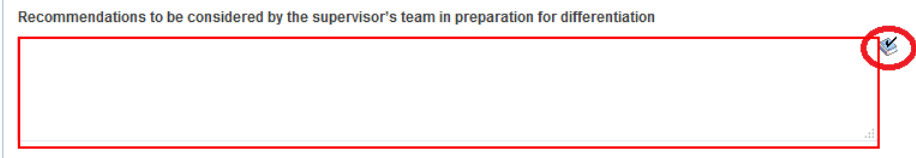
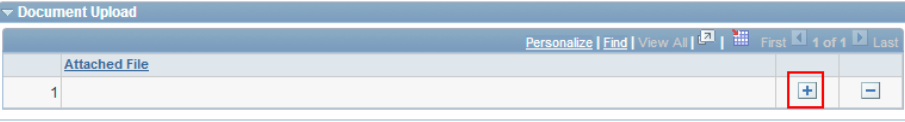
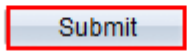
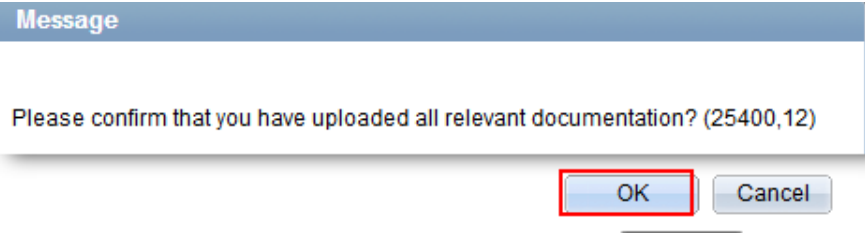
If no, please outline the recommended changes to be made to the project plan.  
 If 'no' is selected the supervisor should outline the recommended changes in this field.

Does the Project Title need changed? No

If yes, please confirm the new Project Title

Step	Action
12.	Add the <b>title, first</b> and <b>last name</b> .

Step	Action
13.	<p>If there was more than one attendee present, click <b>Add a new row</b> button.</p>
14.	<p>Add the details of the <b>second attendee</b>.</p> <p>Add further attendees if required.</p>
15.	<p>In the field, "Is the Research Plan reasonable taking into account the required timeframe for the degree" select either <b>Yes</b> or <b>No</b>.</p>
16.	<p>It is only necessary to fill in the <b>text box</b> if you have selected <b>No</b> in the box above.</p> <p>Point to the field and add the data or move on to the next field.</p> <p>Each text box has a <b>spell check</b> facility to the right of the field.</p>

Step	Action
17.	<p>In the field, "Does the Project Title need changed" select either <b>Yes</b> or <b>No</b>.</p> <p><b>If Yes</b>, enter the new title in the next field.</p> <p>In the field "Are the appropriate resources in place?" select either <b>Yes</b> or <b>No</b>.</p> <p><b>If No</b>, provide an explanation in the field below.</p> 
18.	<p>Enter a <b>recommendation</b> to be considered by the supervisor's team in preparation for differentiation.</p> <p>There is a <b>spell check</b> attached to each of the text fields.</p> 
19.	<p>If necessary, add one or more attachments.</p> <p>Click the <b>Plus</b> button under the heading Document Upload. Select your file and <b>Upload</b>.</p> 
20.	<p>Once you are satisfied with the all the data in the form, click the <b>Submit</b> button.</p> <p>If you are not ready to submit, you can <b>Save</b> the data and submit later.</p> 
21.	<p>You will need to confirm you have uploaded all the relevant documentation.</p> <p>Click the <b>OK</b>.button.</p> 
22.	<p>Your data will become available to view by all users, including the student.</p> <p>All users can also download attachments.</p>

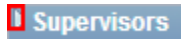
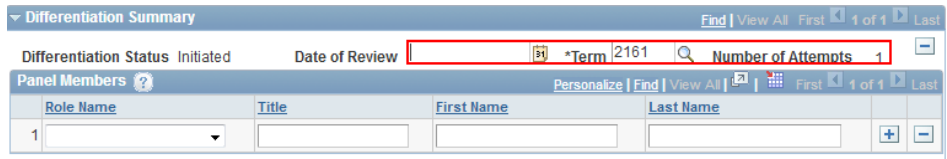


Step	Action
23.	<p>The second tab contains fields that need to be completed by the <b>Head of School or HoS Nominee</b>.</p> <p>Once the form has been submitted, the Head of School or HoS Nominee will need to <b>confirm</b> if they <b>agree</b> with the record/recommendation on the Initial Review/Evaluation Page.</p> <p>Once confirmed, the milestone will appear as <b>completed</b> in the various dashboards.</p>

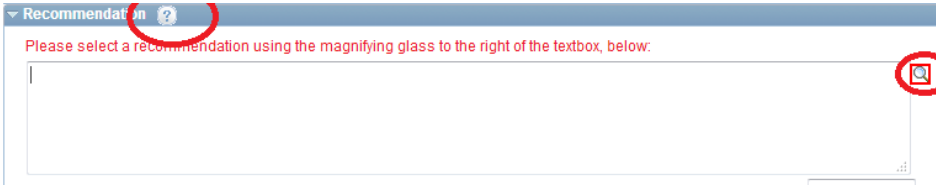
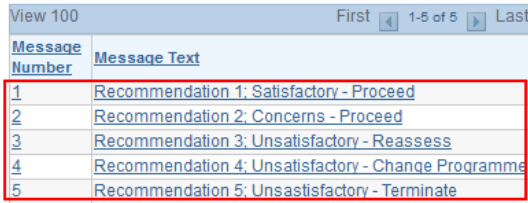
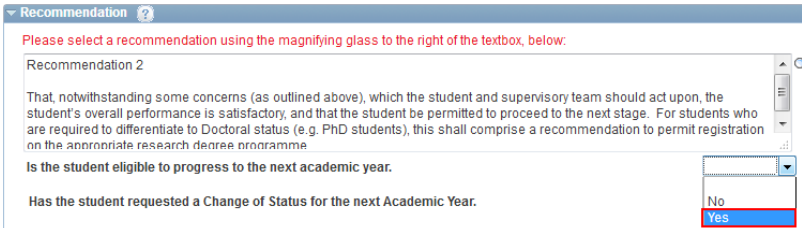
The screenshot shows the 'QUB RSL Supervisor Dashboard' with a sidebar on the left containing links like 'RSL Leave of Absence', 'RSL Links for Supervisors', 'Thesis Management', and 'Candidate Management'. The main area displays a table titled 'RSL Supervisor View of Student' with columns for Student ID, Name, Role, Start, IR, Diff, and various APR milestones (APR.1 to APR.8), Formal Meetings, and PSTP Training. The table lists several students and their supervisors, with progress indicators (green checkmarks, red X's, etc.) in the milestone columns. At the bottom, there are filters for 'Complete', 'Not Due Yet', 'Due Soon', 'Overdue', and 'Not Required'.

Step	Action
24.	<p>The Completed icon will <b>only</b> appear in the dashboards when the Head of School/Nominee has completed their screens.</p> <p>✔</p>
25.	<p>You have now completed the topic Initial Review.</p> <p>If you wish to view the other path, either rewind to the selection page or close the simulation and run again.</p>
26.	<p>Click <b>Differentiation</b>.</p> <p>The screenshot shows a navigation menu with 'Differentiation' highlighted in red. Other options include 'Initial Review', 'Record of Formal Meetings', 'Annual Progress Review', 'Return from Leave of Absence', and 'QUB RSL Supervisor Dashboard'.</p>

Step	Action
27.	<p>The search page will appear. You will need to enter the student number and choose the correct entry.</p> <p>Click in the <b>Empl ID field</b> and enter the <b>student number</b>.</p> <p>Empl ID: <input type="text" value="begins with"/> </p> <p>Academic Institution: <input type="text" value="begins with"/> </p> <p>Academic Career: <input type="text" value="="/> </p> <p>Student Career Nbr: <input type="text" value="="/> </p> <p>Candidate Number: <input type="text" value="begins with"/> </p> <p>Number of Attempts: <input type="text" value="="/> </p> <p>Term: <input type="text" value="begins with"/> </p> <p>Differentiation Status: <input type="text" value="="/> </p> <p>Academic Organization: <input type="text" value="begins with"/> </p> <p>Academic Program: <input type="text" value="begins with"/> </p> <p>Academic Program Status: <input type="text" value="="/> </p> <p>Last Name: <input type="text" value="begins with"/></p> <p>First Name: <input type="text" value="begins with"/></p> <p><input type="checkbox"/> Case Sensitive</p>

Step	Action
28.	<p>The Overdue icon indicates that the milestone <b>has not been completed</b>.</p> <p>The icons in the dashboard will only change to completed once all steps have been completed including by the Head of School/Nominee.</p> <p>Please note that the status indicates whether the milestone has been completed or not, and <b>does not indicate</b> whether it has been <b>passed or not</b>.</p> <p>The only exception is when the recommendation <b>3 - Unsatisfactory Reassess</b> has been selected. The milestone will not appear as completed. The student will appear in a Referred list in Qsis for the Head of School/Nominee to consider.</p>

Step	Action
29.	<p>If you wish to see who is currently supervising the student, click the <b>Expand section Supervisors</b> arrow.</p> 
30.	<p>Click in the <b>Date of Review</b> field and add the actual date the Differentiation took place.</p> <p>Select the correct <b>Term</b>. It will default to the 'current' Term. If incorrect, use the spyglass look up and choose the correct Term.</p> <p>The <b>Number of Attempts</b> will default to 1 (read only).</p> 
31.	<p>For each milestone, it is necessary to add the attendees. Click in the <b>Role Name</b> field to view the types of roles.</p> <p>Choose either <b>Chair</b> or <b>Attendee</b>. Please note for Differentiation there must be <b>at least one Chair panel member present</b></p> 
32.	<p>Add the Title, First and Last name.</p> <p>Click the <b>Add a new row</b> arrow.</p> 
33.	Add <b>all</b> the attendees.

Step	Action												
34.	<p>You will need to select either <b>Yes</b> or <b>No</b> in the Ethical Approval box.</p> <p>You only need to provide additional information if the project requires ethical approval and this has not yet been granted.</p>												
35.	<p>Enter <b>feedback</b> in the appropriate box.</p> <p>There is a <b>spell check</b> attached to each of the text fields.</p>												
36.	<p>There are a set of standard recommendations.</p> <p>To access the standard recommendations, click the <b>magnifying glass</b> graphic.</p> <p>The <b>Help</b> text button provides full descriptions of the recommendations.</p> 												
37.	<p>Select the appropriate <b>Recommendation</b>.</p> <p><b>Search Results</b></p>  <table border="1"> <thead> <tr> <th>Message Number</th><th>Message Text</th></tr> </thead> <tbody> <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> </tbody> </table>	Message Number	Message Text	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
Message Number	Message Text												
1	Recommendation 1: Satisfactory - Proceed												
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3	Recommendation 3: Unsatisfactory - Reassess												
4	Recommendation 4: Unsatisfactory - Change Programme												
5	Recommendation 5: Unsatisfactory - Terminate												
38.	<p>The text for the selected recommendation will appear in the textbox.</p> <p>Select whether the student is <b>eligible to progress</b> to the next academic year.</p> 												



Step	Action
39.	<p>Select whether the student has requested a change of status for the next Academic Year e.g. from full time to part time.</p> <p>Select either <b>Yes</b> or <b>No</b>.</p> <p>Please select a recommendation using the magnifying glass to the right of the textbox, below:</p>
40.	<p>If required, select either <b>Full Time</b> or <b>Part Time</b>.</p> <p>Is the student eligible to progress to the next academic year.</p> <p>Has the student requested a Change of Status for the next Academic Year.</p> <p>If yes, please select which one of the following registration statuses is applicable:</p>
41.	<p>There is a facility to add additional information.</p> <p>Note this field is maximum 250 characters.</p>

**Qsis**  
 Pages | Main Menu | Records and Enrollment | Graduate Research Management | Q&R Research Student Lifecycle | Differentiation

**Ethical Approval**  
 Does this Project require Ethical Approval? Yes  
 Has the Ethical Approval for the Project been granted? Yes  
 If no, please provide an explanation below

**Feedback**  
 Please provide feedback below.  
 Enter feedback in the field below

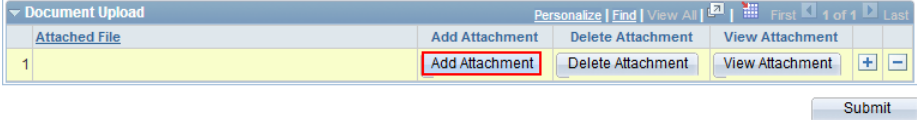
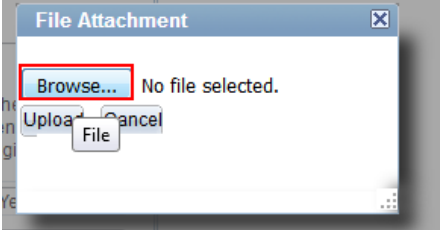
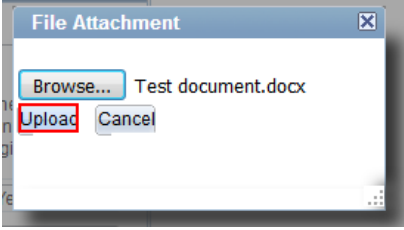
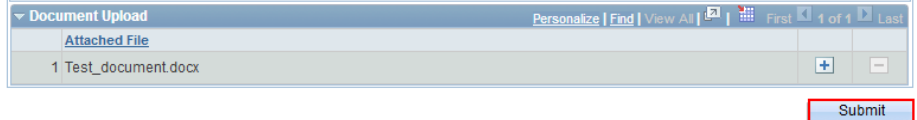
**Recommendation**  
 Please select a recommendation using the magnifying glass to the right of the textbox, below.  
 Recommendation 2  
 That, notwithstanding some concerns (as outlined above), which the student and supervisory team should act upon, the student's overall performance is satisfactory, and that the student be permitted to proceed to the next stage. For students who are required to differentiate to Doctoral status (e.g. PhD students), this shall comprise a recommendation to permit registration on the commensurate research degree programme.  
 Is the student eligible to progress to the next academic year? Yes  
 Has the student requested a Change of Status for the next Academic Year? Yes  
 If yes, please select which one of the following registration statuses is applicable: Part Time

**Additional Information**  
 Additional Information (max 250 characters)  
 Any further comment should be entered into this field


**Document Upload**  
 Attached File  
 Add Attachment Delete Attachment View Attachment  
 1 Add Attachment Delete Attachment View Attachment

Save Return to Search Previous in List Next in List Ready

Differentiation Summary | Differentiation Approval

Step	Action
42.	<p>There is also the facility to add additional information through attachments.</p> <p>Click the <b>Add Attachment</b> button.</p> 
43.	<p>Click the <b>Browse</b> button and find the file on your computer.</p> 
44.	<p>Once you have found the file, click the <b>Upload</b> button.</p> 
45.	<p>Once you are satisfied with all the data entered, click the <b>Submit</b> button.</p> <p>If you are not ready to submit, you can <b>Save</b> your data without submitting.</p> 

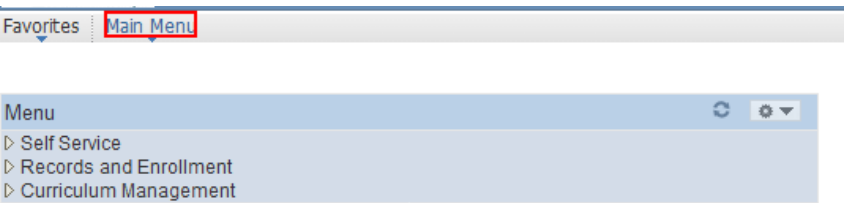
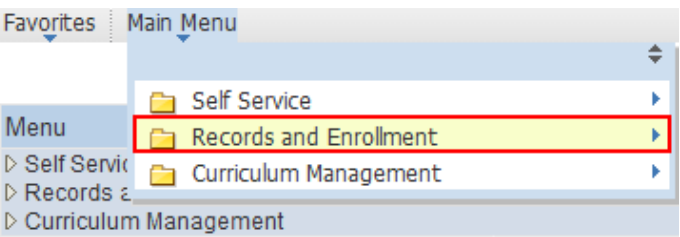
The screenshot displays the Qsis RSL Supervisor Dashboard. It features a sidebar with navigation links like 'RSL Leave of Absence', 'RSL Links for Supervisors', 'PSEP Training', 'Thesis Management', and 'Candidate Management'. The main area shows a table of students and supervisors with various columns for tracking progress, including 'Start', 'ID', 'Diff', and 'APR' (April) months. A green checkmark icon is present in the 'Complete' column for the first student, indicating that the task has been completed.

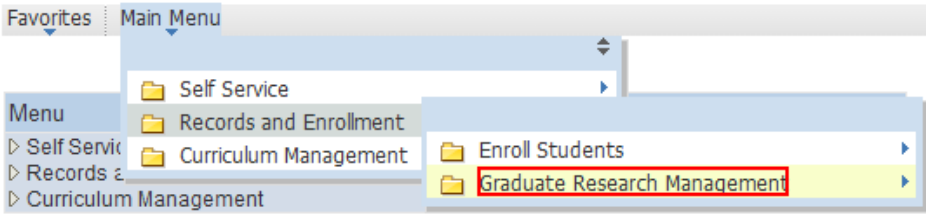
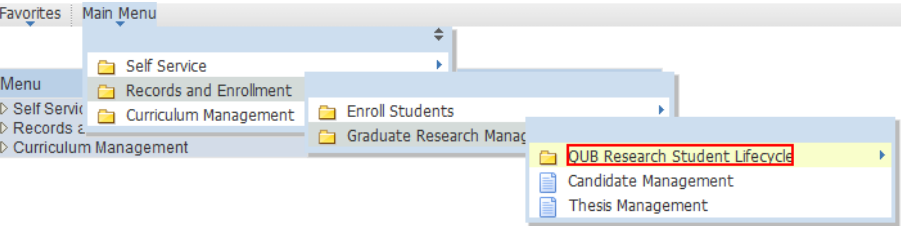
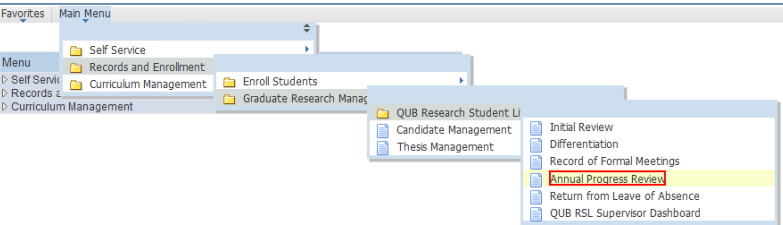
Step	Action
46.	The Completed icon will <b>only</b> appear in the dashboards when the Head of School/Nominee has completed their screens. 
47.	You have now completed the topic Differentiation.

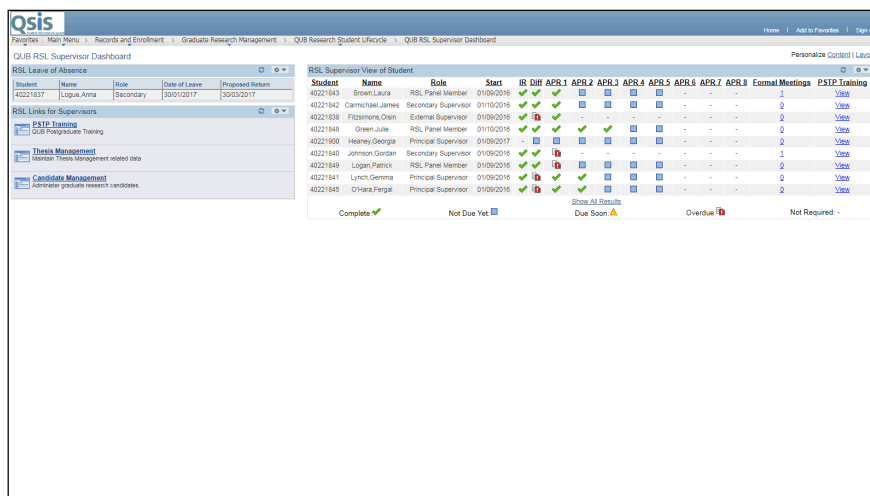
### 3. Adding data to the APR section

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 <b>Main Menu</b> 
2.	Click <b>Records and Enrollment</b> 

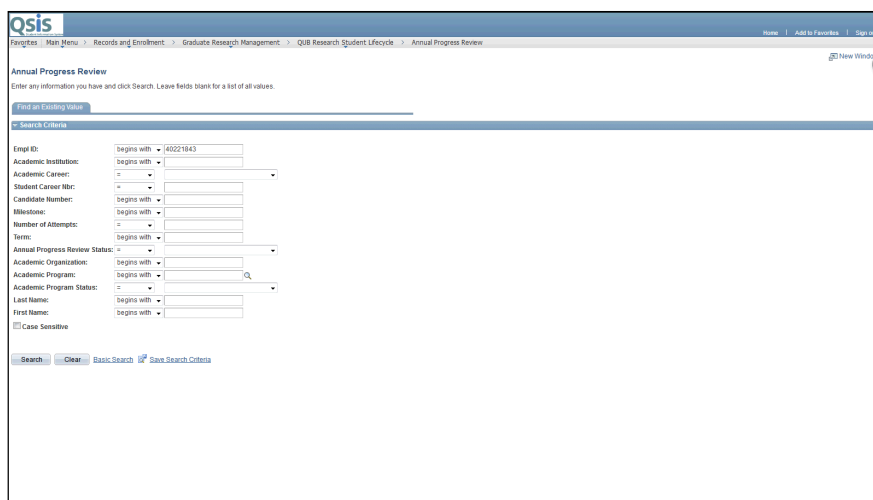
Step	Action
3.	<p>Click <b>Graduate Research Management</b></p> 
4.	<p>Click <b>QUB Research Student Lifecycle</b></p> 
5.	<p>Click <b>Annual Progress Review</b></p> 
6.	<p>Enter the <b>student number</b> in the <b>Empl ID</b> field</p> <p><b>Or:</b></p> <p>Click <b>Search</b> to reveal a list of all students where you have been assigned as a supervisor. This may be a long list as students will have more than one APR assigned to them.</p>

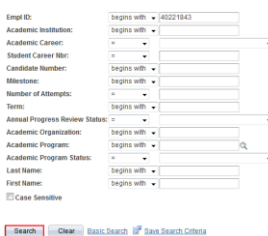
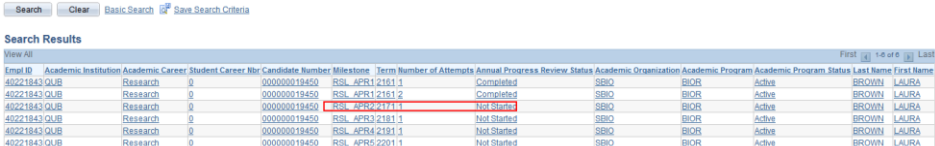



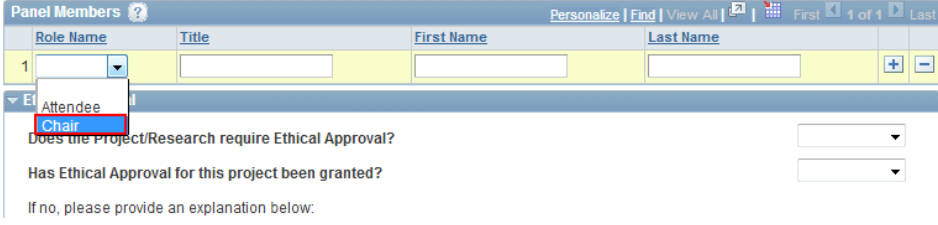
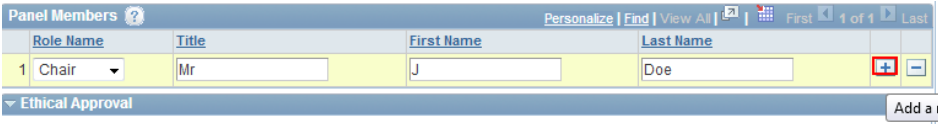
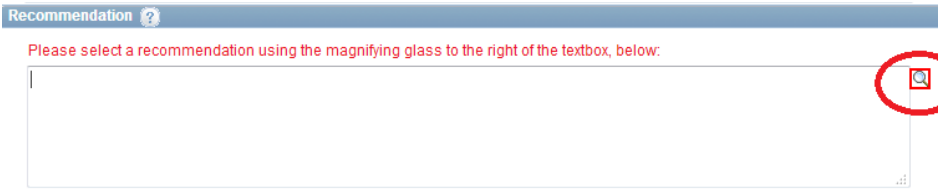
The screenshot displays the Qsis RSL Supervisor Dashboard. On the left, there are links for 'RSL Leave of Absence', 'RSL Links for Supervisors', 'PSTP Training', 'Thesis Management', and 'Candidate Management'. The main area shows a table of students with columns for Student ID, Name, Role, Start Date, and progress review status for various months (APR.1 to APR.9). A legend at the bottom indicates status: Complete (green check), Not Due Yet (blue square), Due Soon (yellow triangle), Overdue (red square), and Not Required (grey square).

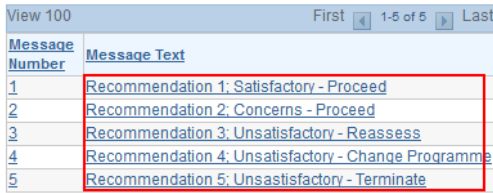
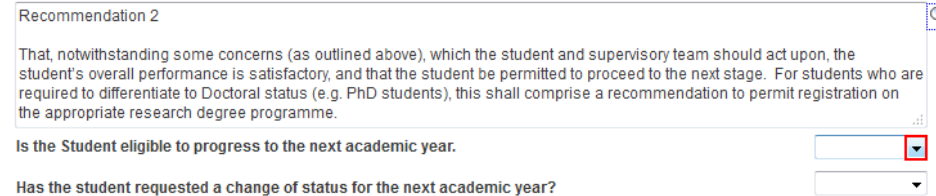
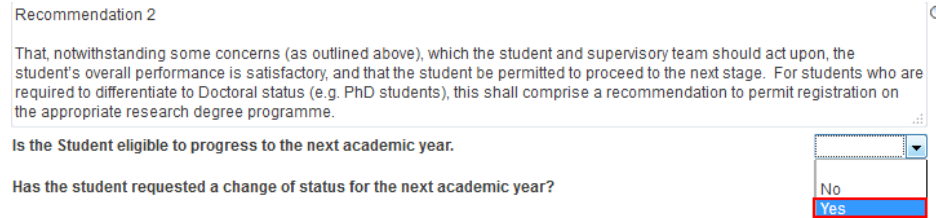
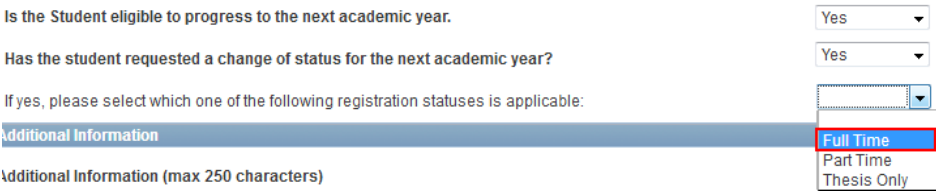
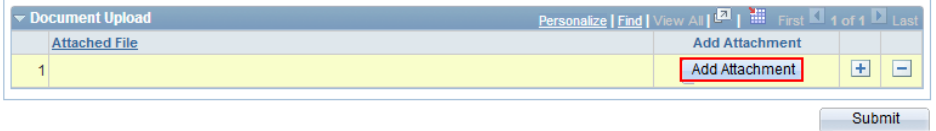
Student	Name	Role	Start	IS	Diff	APR.1	APR.2	APR.3	APR.4	APR.5	APR.6	APR.7	APR.8	APR.9	Formal Meetings	PSTP Training
40221837	Louise Anna	Secondary	10/01/2017												0	View
40221842	Carmichael James	Secondary Supervisor	01/09/2016												0	View
40221838	Fitzsimons Dean	External Supervisor	01/09/2016												0	View
40221848	Green Julie	RSL Panel Member	01/10/2016												0	View
40221900	Heaney Georgia	Principal Supervisor	01/09/2017												2	View
40221840	Johnson Gordon	Secondary Supervisor	01/09/2016												1	View
40221849	Logan Patrick	RSL Panel Member	01/09/2016												0	View
40221841	Lynch Gemma	Principal Supervisor	01/09/2016												0	View
40221845	Chahra Fergal	Principal Supervisor	01/09/2016												2	View

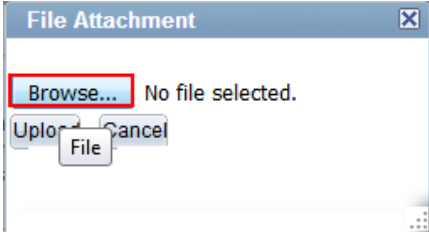
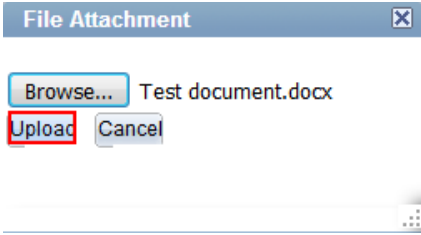
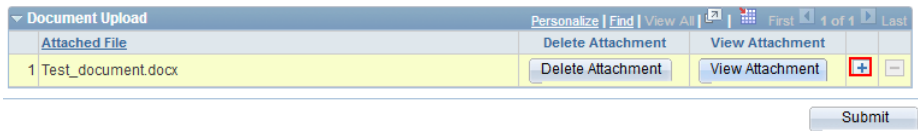
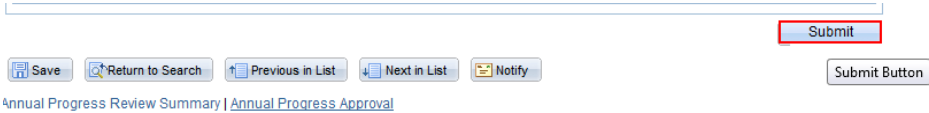
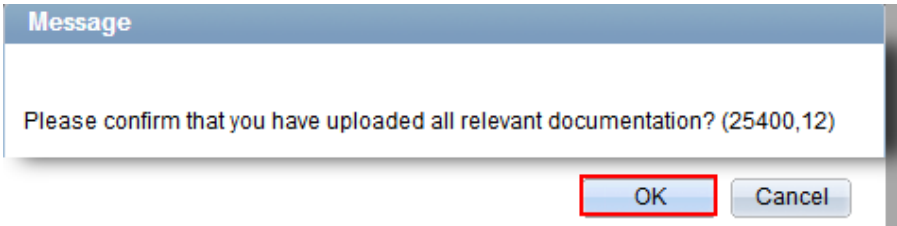
Step	Action
7.	<p>The dashboard will indicate if an APR is overdue, completed, not due yet or not required.</p> <p>Please note that the status indicates whether the milestone has been completed or not, and <b>does not indicate</b> whether it has <b>been passed or not</b>.</p> <p>The only exception is when the recommendation <b>3 - Unsatisfactory Reassess</b> has been selected. The milestone will not appear as completed. The student will appear in a Referred list in Qsis for the Head of School/Nominee to consider.</p> 



Step	Action
8.	<p>Click the <b>Search</b> button.</p> 
9.	<p>This will reveal a list of all the Annual Progress Review milestones that have been assigned to the student.</p> <p>Click the appropriate row.</p> 

Step	Action
10.	<p>Click in the <b>Date of Review</b> field and add the actual date the APR took place.</p> <p>Select the correct <b>Term</b>. It will default to the ‘current’ term. If incorrect, use the look up spyglass and choose the correct term</p> <p>The <b>Number of Attempts</b> will default to 1 (read only).</p>
11.	<p>For each milestone it is necessary to add all attendees.</p> <p>Click in the <b>Role Name</b> field to view the types of roles.</p> 
12.	<p>Click either <b>Chair or Attendee</b></p> 
13.	<p>To add additional panel members, click the <b>Add a new row</b> plus button.</p> 
14.	<p>You are required to add the details of all the panel members.</p> <p>There must be at a minimum of one Chair and one attendee.</p>
15.	<p>You will need to select either <b>Yes</b> or <b>No</b> in the Ethical Approval box.</p> <p>Answering ‘Yes / No’ at respective questions will result in the text field either becoming not editable or mandatory.</p>
16.	Enter <b>feedback</b> in the appropriate box.
17.	There is a <b>spell check</b> attached to each of the text fields.
18.	<p>It is necessary to add a recommendation. There are a set of standard recommendations.</p> <p>To access the standard recommendations, click the <b>magnifying glass</b> graphic.</p> 

Step	Action												
19.	<p>Select the appropriate <b>Recommendation</b>.</p> <p><b>Search Results</b></p>  <p>View 100 First 1-5 of 5 Last</p> <table border="1"> <thead> <tr> <th>Message Number</th><th>Message Text</th></tr> </thead> <tbody> <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> </tbody> </table>	Message Number	Message Text	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
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3	Recommendation 3: Unsatisfactory - Reassess												
4	Recommendation 4: Unsatisfactory - Change Programme												
5	Recommendation 5: Unsatisfactory - Terminate												
20.	<p>The text for the selected recommendation will appear in the textbox.</p> <p>Select whether the student is <b>eligible to progress</b> to the next academic year. Click the list.</p> <p>Please select a recommendation using the magnifying glass to the right of the textbox, below:</p>  <p>Recommendation 2</p> <p>That, notwithstanding some concerns (as outlined above), which the student and supervisory team should act upon, the student's overall performance is satisfactory, and that the student be permitted to proceed to the next stage. For students who are required to differentiate to Doctoral status (e.g. PhD students), this shall comprise a recommendation to permit registration on the appropriate research degree programme.</p> <p>Is the Student eligible to progress to the next academic year. <input type="text" value="Yes"/></p> <p>Has the student requested a change of status for the next academic year? <input type="text"/></p>												
21.	<p>Select whether the student has requested a change of status for the next Academic Year.</p> <p>Select either <b>Yes</b> or <b>No</b>.</p>  <p>Recommendation 2</p> <p>That, notwithstanding some concerns (as outlined above), which the student and supervisory team should act upon, the student's overall performance is satisfactory, and that the student be permitted to proceed to the next stage. For students who are required to differentiate to Doctoral status (e.g. PhD students), this shall comprise a recommendation to permit registration on the appropriate research degree programme.</p> <p>Is the Student eligible to progress to the next academic year. <input type="text" value="No"/></p> <p>Has the student requested a change of status for the next academic year? <input type="text" value="Yes"/></p>												
22.	<p>If required, select either <b>Full Time</b>, <b>Part Time</b> or <b>Thesis Only</b>.</p>  <p>Is the Student eligible to progress to the next academic year. <input type="text" value="Yes"/></p> <p>Has the student requested a change of status for the next academic year? <input type="text" value="Yes"/></p> <p>If yes, please select which one of the following registration statuses is applicable:</p> <p>Additional Information <input type="text" value="Full Time"/></p> <p>Additional Information (max 250 characters)</p> <p>Full Time Part Time Thesis Only</p>												
23.	<p>There is the facility to add <b>additional information</b>.</p> <p>Note this field is maximum 250 characters.</p>												
24.	<p>There is also the facility to add attachments.</p> <p>Click the <b>Add Attachment</b> button.</p>  <p>Document Upload Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Attached File</th><th>Add Attachment</th></tr> </thead> <tbody> <tr> <td>1</td><td>Add Attachment</td></tr> </tbody> </table> <p>Submit</p>	Attached File	Add Attachment	1	Add Attachment								
Attached File	Add Attachment												
1	Add Attachment												


Step	Action
25.	<p>Click the <b>Browse</b> button and find the file on your computer.</p> 
26.	<p>Once you have found the file, click the <b>Upload</b> button.</p> 
27.	<p>You can add more than one attachment.</p> <p>Click the <b>Add a new row</b> plus button.</p> 
28.	<p>Once you are satisfied with all the data entered, click the <b>Submit</b> button.</p> <p>If you are not ready to submit, you can <b>Save</b> the page.</p> 
29.	<p>You will need to confirm you have uploaded all the relevant documentation.</p> <p>Click the <b>OK</b> button.</p> <p>Your data will now become available to all users, including the student.</p> 



**RSL Supervisor View of Student**


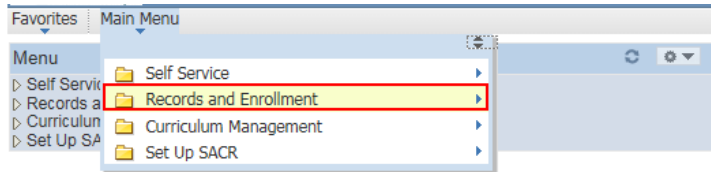
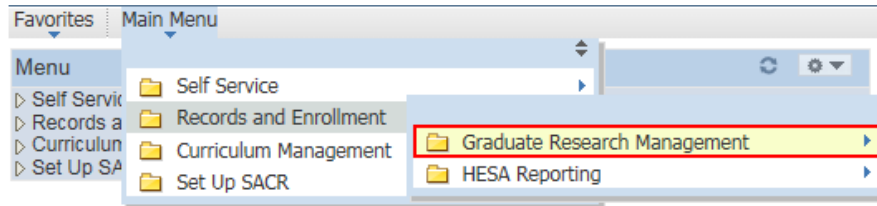
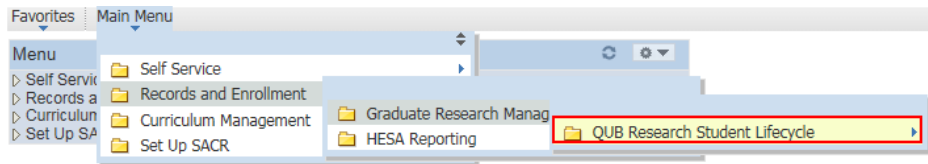
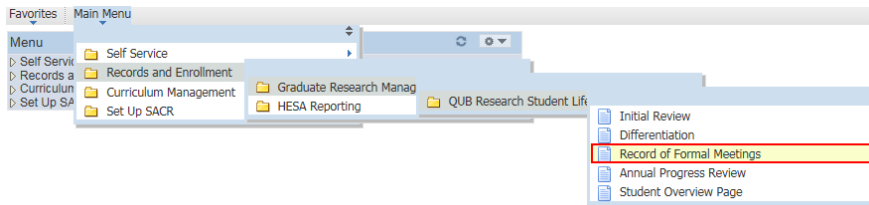
Student	Name	Role	Start	ID	DIF	APR.1	APR.2	APR.3	APR.4	APR.5	APR.6	APR.7	APR.8	Formal Meetings	PPIP Training
40221843	Brown, Laura	RSL Panel Member	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1	View
40221842	Carmichael, James	Secondary Supervisor	01/10/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221838	Fitzsimons, Orlan	External Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221848	Green, Julie	RSL Panel Member	01/10/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221900	Heaney, Georgia	Principal Supervisor	01/09/2017	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221840	Johnson, Gordon	Secondary Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	1	View
40221849	Logan, Patrick	RSL Panel Member	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221841	Lynch, Gemma	Principal Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View
40221845	O'Hara, Fergal	Principal Supervisor	01/09/2016	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	0	View

Complete ✓ Not Due Yet □ Due Soon ▲ Overdue ■ Not Required -

Step	Action
30.	<p>These icons will only update once all the users have completed their steps in the process.</p> 
31.	<p>The second tab contains fields that need to be completed by the <b>Head of School or HoS Nominee</b>.</p> <p>They will need to <b>confirm</b> if they agree with the <b>record/recommendation</b> on the Annual Progress Review Summary Page.</p> <p>Once this information has been submitted, the milestone will appear as <b>completed</b> in the various dashboards.</p>
32.	You have now completed this topic.

## 4. Adding a Record of Formal Meeting

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

Step	Action
1.	To navigate in Qsis click <b>Main Menu</b> . 
2.	Click <b>Records and Enrollment</b> . 
3.	Click <b>Graduate Research Management</b> . 
4.	Click <b>QUB Research Student Lifecycle</b> . 
5.	Click <b>Record of Formal Meetings</b> . 

Qsis

Home | Add to Favorites | Sign out

Records > Main Menu > Records and Enrollment > Graduate Research Management > Q&R Research Student Lifecycle > Record of Formal Meetings

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

Empl ID: [dropdown] [text] [magnifying glass]

Academic Institution: [dropdown] [text] [magnifying glass]

Academic Career: [dropdown] [text] [magnifying glass]

Student Career Nbr: [dropdown] [text] [magnifying glass]

Candidate Number: [dropdown] [text] [magnifying glass]

Term: [dropdown] [text] [magnifying glass]

Formal Meeting Number: [dropdown] [text] [magnifying glass]

Formal Meeting Status: [dropdown] [text] [magnifying glass]

Academic Organization: [dropdown] [text] [magnifying glass]

Academic Program: [dropdown] [text] [magnifying glass]

Academic Program Status: [dropdown] [text] [magnifying glass]

Last Name: [dropdown] [text] [magnifying glass]

First Name: [dropdown] [text] [magnifying glass]

☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

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

Qsis

Home | Add to Favorites | Sign out

Records > Main Menu > Records and Enrollment > Graduate Research Management > Q&R Research Student Lifecycle > Record of Formal Meetings

Record of Formal Meetings

Find an Existing Value | Add a New Value

Empl ID: 40221840 [x] [magnifying glass]

Academic Institution: [text] [magnifying glass]

Academic Career: [text] [magnifying glass]

Student Career Nbr: [text] [magnifying glass]

Candidate Number: 000000000000 [magnifying glass]

Term: [text] [magnifying glass]

Formal Meeting Number: [text] [magnifying glass]

Add

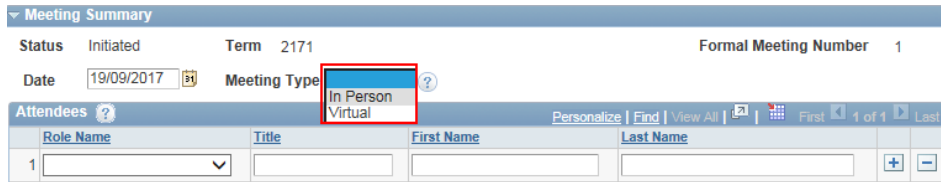
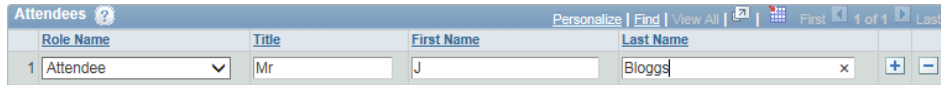


Find an Existing Value | Add a New Value

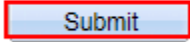
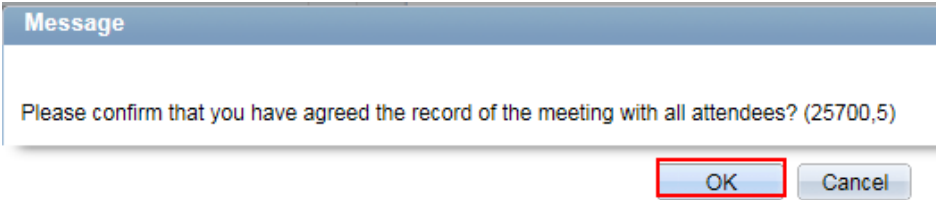
Step	Action
7.	<p>On this page the student details need to be added. Add the <b>student number</b> in the <b>Empl ID</b> field.</p> <p>Next, click the <b>Look up Academic Institution</b> spyglass button.</p> <p>Record of Formal Meetings</p> <p>Find an Existing Value   Add a New Value</p>

Step	Action		
8.	<p>Click the <b>QUB</b> link.</p> <p>Academic Institution: <input type="text" value="begins with"/> <input type="text"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> <a href="#">Basic Lookup</a></p> <p><b>Search Results</b></p> <p>View 100 First <input type="button" value="1 of 1"/> Last</p> <table><tr><th>Academic Institution</th></tr><tr><td><b>QUB</b></td></tr></table>	Academic Institution	<b>QUB</b>
Academic Institution			
<b>QUB</b>			
9.	<p>Click the <b>Look up Academic Career</b> spyglass button.</p> <p>Empl ID: <input type="text" value="40221840"/> <input type="button" value="Q"/></p> <p>Academic Institution: <input type="text" value="QUB"/> <input type="button" value="Q"/></p> <p>Academic Career: <input type="text"/> <input type="button" value="Q"/></p> <p>Student Career Nbr: <input type="text" value="0"/> <input type="button" value="Q"/></p> <p>Candidate Number: <input type="text" value="000000000000"/> <input type="button" value="Q"/></p> <p>Term: <input type="text"/> <input type="button" value="Q"/></p> <p>Formal Meeting Number: <input type="text"/> <input type="button" value="Q"/></p>		
10.	<p>Click the <b>Research</b> 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</p> <p>Academic Institution: QUB</p> <p>Academic Career: <input type="text" value="="/> <input type="text"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> <a href="#">Basic Lookup</a></p> <p><b>Search Results</b></p> <p>View 100 First <input type="button" value="1 of 1"/> Last</p> <table><tr><th>Academic Career</th></tr><tr><td><b>Research</b></td></tr></table>	Academic Career	<b>Research</b>
Academic Career			
<b>Research</b>			
11.	<p>Click the <b>Look up Candidate Number</b> spyglass button.</p> <p>Empl ID: <input type="text" value="40221840"/> <input type="button" value="Q"/></p> <p>Academic Institution: <input type="text" value="QUB"/> <input type="button" value="Q"/></p> <p>Academic Career: <input type="text" value="PGR"/> <input type="button" value="Q"/></p> <p>Student Career Nbr: <input type="text" value="p"/> <input type="button" value="Q"/></p> <p>Candidate Number: <input type="text" value="000000000000"/> <input type="button" value="Q"/></p> <p>Term: <input type="text"/> <input type="button" value="Q"/></p> <p>Formal Meeting Number: <input type="text"/> <input type="button" value="Q"/></p> <p><input type="button" value="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 <b>Candidate Number</b> link.</p> <p>Empl ID: 40221840</p> <p>Academic Institution: QUB</p> <p>Academic Career: Postgraduate Research</p> <p>Student Career Nbr: 0</p> <p>Candidate Number: <input type="text" value="begins with"/> <input type="text"/></p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> <a href="#">Basic Lookup</a></p> <p><b>Search Results</b></p> <p>View 100 First <input type="button" value="1 of 1"/> Last</p> <table><tr><th>Candidate Number</th></tr><tr><td><b>0000001944</b></td></tr></table>	Candidate Number	<b>0000001944</b>
Candidate Number			
<b>0000001944</b>			

Step	Action						
13.	<p>Click the <b>Look up Term</b> 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="0000000194"/> </p> <p>Term: <input type="text"/> </p> <p>Formal Meeting Number: <input type="text"/> </p>						
14.	<p>Click the correct <b>Academic Year</b> link.</p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: Postgraduate Research Student Career Nbr: 0 Candidate Number: 000000019447 Term: <input type="text" value="begins with"/>  Description: <input type="text" value="begins with"/> </p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> <a href="#">Basic Lookup</a></p> <p><b>Search Results</b></p> <p>View 100 First <a href="#">1</a> 1-2 of 2 <a href="#">3</a> Last</p> <table><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						
15.	<p>Click the <b>Look up Formal Meeting Number</b> 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="000000019447"/> </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 <b>one value</b>. This will be the <b>next meeting</b> that needs to be added.</p> <p>In this instance, the first <b>Record of Formal Meeting</b> for the academic year will be selected.</p> <p>Click the <b>1</b> link.</p> <p><b>Look Up Formal Meeting Number</b></p> <p>Empl ID: 40221840 Academic Institution: QUB Academic Career: Postgraduate Research Student Career Nbr: 0 Candidate Number: 000000019447 Formal Meeting Number: <input type="text"/> </p> <p><input type="button" value="Look Up"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> <a href="#">Basic Lookup</a></p> <p><b>Search Results</b></p> <p>View 100 First <a href="#">1</a> 1 of 1 <a href="#">3</a> Last</p> <table><thead><tr><th>Formal Meeting Number</th></tr></thead><tbody><tr><td><a href="#">1</a></td></tr></tbody></table>	Formal Meeting Number	<a href="#">1</a>				
Formal Meeting Number							
<a href="#">1</a>							

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

Step	Action
19.	<p>Click the <b>Meeting Type</b> list and select either <b>In Person</b> or <b>Virtual</b> depending on how the meeting was conducted.</p> 
20.	<p>The next step is to add the attendees.</p> <p>Click the <b>Role Name</b> and select either <b>Attendee</b> or <b>Chair</b>.</p> <p>Add the Title, First and Last Name.</p>
21.	<p>Press the <b>Plus</b> 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 <b>summary</b> of the meeting in the first field.</p> <p>Enter the agreed <b>actions and next steps</b> in the second field</p> <p>There is a <b>spell check</b> attached to each of the text fields.</p>
24.	<p>If required, you can add attachments.</p> <p>Point to the <b>Add Attachment</b> 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 <b>Date</b> field and enter the correct date. The date format will be the standard UK format but may display in the American format depending on the defaults on your machine.</p> 

Step	Action
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 <b>Save</b> 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 <b>Submit</b> button.</p> 
27.	<p><b>You will be asked to confirm that the content you have added has been agreed.</b></p> <p>If appropriate, click the <b>OK</b> 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 <b>Initiated</b>.</p>
30.	You have now completed this topic.