PGR Manager for Students: A Guide

Directly Supported Students and
Affiliated Research Centres (ARC)
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Logging in

- When logging into the system for the first time you will be presented with a Login Page as shown.

Fig 1.

- If you are a Directly Supported student at the Open University, please select the login button as shown, to enter the system you will need to provide an email address using your OUCU and OU password. For example: OUCU@open.ac.uk. No other email addresses will be permitted.

- If you are a student from our Affiliated Research Centres (ARC) then click on Set up your account. You will be presented with this screen. Enter your ARC email address supplied by your relevant ARC and click Submit.

Fig 2.
Introduction and Project Page

- All student users of the PGR Manager system will have a My Project page which displays the status of key information.
- On the right of the screenshot you will see the functionality available to the user and the relevant links associated with it.

Fig 3

- This preview shows the current status of all activities during the student journey, showing important dates as the student progresses.
Confirmation of project details

- In PGR Manager, applications start with a check that key information on the project is correct. If it is not, changes can be requested via The Graduate School Team for revision.

**Fig 4**

### Confirm project details

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

Options: Request changes, The project details are correct

<table>
<thead>
<tr>
<th>Title</th>
<th>Doctoral Research Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researcher</td>
<td>Mr. Sam Smith</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Dr Eulalie Yates</td>
</tr>
<tr>
<td>Research institute</td>
<td>Computer Science</td>
</tr>
<tr>
<td>Project mode</td>
<td>Part Time</td>
</tr>
<tr>
<td>Doctoral research project type</td>
<td>PhD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date completed</th>
<th>Deadline</th>
<th>Reminder sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project start</td>
<td>26 Sep 2019</td>
<td></td>
</tr>
<tr>
<td>Project end</td>
<td>26 Sep 2026</td>
<td>26 Sep 2024</td>
</tr>
</tbody>
</table>

**Confirmation of project details**
Induction

- Once your Induction is completed, we ask all students to complete the “Induction” tab on the PGR Manager system.
- This can be found on the right-hand side of the screen as indicated.

**Fig 5**

Once accessed you are presented with an Edit: Induction – student name fields (see Figure 6 below).
- Please complete all fields and save by clicking the Save button at the bottom left of the screen.
- This is reviewed by the Graduate School to ensure you have completed everything as required.
Edit: Induction - Mr Aamir Day

Have you agreed a schedule of meetings with your supervisors? *
- Yes
- No

If yes, please provide details

Have you been provided with the name and contact details of your Third party monitor? *
- Yes
- No

If yes, have you been offered an opportunity to meet them?
- Yes
- No

Was induction completed satisfactorily? *
- Yes
- No
- N/A

Comments

What induction activities have you undertaken? (at both Faculty and University level)

Are you aware of the University's complaints and appeals policy?
- Yes
- No

Have you completed the mandatory training? e.g. PREVENT and GDPR
- Yes
- No

Do you have any concerns that you wish to bring to the attention of the Graduate School?

Save  Save for later
Supervision Meetings

- To record your supervision meetings, select the tab on the right-hand side as indicated below.

**Fig 7**

Once accessed you are presented with a Project supervision: thesis title screen. To add a meeting select New supervision meeting.
Once accessed you will be presented with an Edit Supervision notes: Supervision meeting screen where you can add your participants at the meeting, add dates, meeting time etc and add any information in connection with the meeting. You can also upload any relevant documentation directly into the system here.

Once all fields are completed click the Save and continue button at the bottom of the screen.
A change request is typically submitted by the student or their supervisor to request a change to registration e.g. study break, extension and change of mode and attendance etc. Upon approval, project dates and status are updated.

To access the change of requests tab, click on the right-hand side of the screen under Change requests.

Once selected you will be presented with a Change Request Overview screen.
### Change requests overview: On face a level room by war

**Mr Aamir Butcher**

Start a new change request!

<table>
<thead>
<tr>
<th>Application</th>
<th>Date</th>
<th>Summary</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>De-registration - Mr Aamir Butcher</td>
<td>16 Dec 2020</td>
<td>Not endorsed, registration continues</td>
<td></td>
</tr>
<tr>
<td>Extension - Mr Aamir Butcher</td>
<td>16 Dec 2020</td>
<td>Authorised</td>
<td></td>
</tr>
<tr>
<td>Change Supervisors - Mr Aamir Butcher</td>
<td>08 Dec 2020</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>Study break - Mr Aamir Butcher</td>
<td>01 Dec 2020</td>
<td>Waiting for supervisor to review</td>
<td></td>
</tr>
</tbody>
</table>
This screen is designed to show what change requests have been requested and the status of each request. To start the process, select the Start a new change request as indicated above.

**Fig 12**

Change requests

- Study Another Qualification
- Mode
- Post-viva Requirements Extension
- Extension to Upgrade Deadline
- Residency Waiver
- Withdrawal

Once accessed you are presented with a Change requests list which prompts you to select the change request you require.

As the first selection is Study Another Qualification we will start there.

To access this workflow, select Study Another Qualification which then takes you to a Study Another Qualification screen. The system will ask you if you would like to complete and submit the request form. Click Start request.

**Fig 13**

**Study Another Qualification**

Please submit a request if you want to study another qualification.

Would you like to complete and submit the request form?

Cancel Start request

Once accessed this takes you to a Confirm project details screen.

You will be prompted to confirm that the registration details are correct. Please check the information presented on the screen. To confirm, click on The registration details are correct.
Once confirmed you will be presented with an Edit Change request form: Study Another Qualification – student name. This screen allows you to begin the process of adding the details of your chosen new qualification that you wish to study. You will then be presented with Thesis title and Request tabs.
• All fields in both tables must be completed in full before this can be forwarded for approval. Remember to Confirm and Submit your request and add any notes that would benefit your request. Once submitted this will then be passed on through the workflow to the appropriate approver. Once your request has been reviewed, an email is sent directly to you and your supervisors with the result of the request. The outcome and status of your request throughout the process can be viewed on your study main screen as below.

Fig 17

• The status bar at the top of the screen in Figure 17 above shows you the current status of your request and where in the process your application is (and with whom). The status bar will also show the end result of your request (i.e. whether it has been approved or declined).

• All change requests work in the same way with all statuses shown on the right-hand side of the screen so that at any point during any request you can review and see
where your requests are and with whom. Email alerts are also sent to you, your assigned supervisors and the relevant approvers along the request journey.

- If you wish to start a new request then refer back to Figs 8, 9 and 10 - Change requests, make your selection from the list provided and Start a new change request. All request workflows work in the same way; please complete all tabs on each page providing the information required. Once completed do not forget to click the Confirm and Submit button shown on Fig 13 so that your request can be forwarded for approval by the appropriate authority.
- The main student screen shown in Fig 7 will provide you with an update of your request and show its status, as previously described. As before, emails will be sent to you providing information on the status of your request and to the approver to flag the actions that they need to take.

Absences

- If you are a student who has is a Student Route Visa Holder (previously known as Tier 4 student) there is a function on the main page called absence.

**Fig 18**

- Select the Start new absence request
- Once accessed you are presented with a Confirm project details screen where you are prompted to confirm that your registration details are correct as in Fig 11. Please check this and confirm by clicking the Start button. You will now be presented with an Edit Absence: - student name screen.
Please enter the information required for both the Student absence form tab and the Student contact details whilst absent tab.

**Fig 19**

**Edit Absence: Absence - Mr Aamir Day**

- **Student absence form**
- **Student contact details whilst absent**

**Reason for absence**
- Annual leave
- Sickness (usually under one month)
- Authorised absence for study related purposes, including travel to conferences and fieldwork
- Maternity/paternity/adoption leave

**Start**

**End**

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

**If yes, please choose the country you will visit:**

**Fig 20**

**Edit Absence: Absence - Mr Aamir Day**

- **Student absence form**
- **Student contact details whilst absent**

**Method of maintaining contact with supervisory team whilst absent**

I will be communicating with the supervisors during my absence.

**Address**

4, Anyplace
Anyplace - United Kington

**Telephone number**

01244 444444

**Save and continue**  **Save for later**
• Once completed please confirm by clicking on the Save and continue button.

*Fig 21*

Submit: Absence - Mr Aamir Day

Please confirm you wish to submit this absence request

Confirm: Submit request  Cancel

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

• To confirm the request click the Confirm and Submit request button so that the request is sent to the approver. To check that the request has been sent, return to your main student page where you will see the request and whom it is currently with. An email as before is also sent to you as the student and to the first approver for action. Figure 22 below provides a sample of the main screen with a request showing and its status.

*Fig 22*

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

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

- All students are required to complete the upgrade process before their 1\textsuperscript{st} anniversary. To initiate the Upgrade process, select the tab marked Upgrade on the right-hand side of the main project screen as before.

\textit{Fig 23}

- Once selected you are presented with an Upgrade overview screen. To start the process, select the Create new application button as indicated below:

\textit{Fig 24}
• You will then be presented with a Begin upgrade process. Select the Start button.

• Once the selection has been made you will see the Confirm project details screen which asks you to confirm that your registration details are correct. As before, if the information presented is correct, click the button to confirm this. If there are any discrepancies please contact the Graduate School.

• You are now in the Upgrade process. Please complete all tabs shown here remembering to Save and continue at each stage. Noting that in the Absences and Project report tab that there is a mandatory Upload file field. If the information is sensitive and/or confidential you can send this directly to the Research Degrees Team in confidence. This will not be shared with any other parties.
Fig 27

Edit Student form: Upgrade - Mrs Lenee Godfrey

<table>
<thead>
<tr>
<th>Thesis title</th>
<th>Absences</th>
<th>Project report</th>
<th>Progress</th>
<th>Objectives</th>
</tr>
</thead>
</table>

**Thesis title**
Where name that history student community

**Do you wish to update your thesis title?**
- Yes
- No

[Save and continue] [Save for later]

Fig 28

Edit Student form: Upgrade - Mrs Lenee Godfrey

<table>
<thead>
<tr>
<th>Thesis title</th>
<th>Absences</th>
<th>Project report</th>
<th>Progress</th>
<th>Objectives</th>
</tr>
</thead>
</table>

**Details of any periods of study breaks or other absence**

1 June 2020 to July 2020 1 month

If your evidence is sensitive this can be submitted directly to the Research Degrees Team not uploaded here.

[Drag files here or choose file...]

[Drag files here or choose file...]

[Save and continue] [Save for later]

Fig 29

Edit Student form: Upgrade - Mrs Lenee Godfrey

<table>
<thead>
<tr>
<th>Thesis title</th>
<th>Absences</th>
<th>Project report</th>
<th>Progress</th>
<th>Objectives</th>
</tr>
</thead>
</table>

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

[Drag files here or choose file...]

[Drag files here or choose file...]

project report added

[Save and continue] [Save for later]
Please comment on the outputs, benefits, and progress of the following.

**Documented supervision meetings since last progress report**

- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting
- Supervision meeting

**Training events attended**

- Seminar at Coventry 1 July 2020

**Third-party monitor meetings**

- 1 June 2020

**Skills audit**

- XXXXXXXXXXXXXXXXXXXX

**Training and development plan**

- XXXXXXXXXXXXXXXXXXXX
Do not forget to Save and continue to move to the next tab.

You will be presented with a Progress tab. Please note your supervision meetings are automatically added to this tab, the Training events, third-party monitor meetings, skills audit and training and development plan information are required so please enter them as required. Save and continue.

Last but not least you will be required to complete the Objective tab. Once again completion of all these fields is mandatory. Once completed you can check your entries. Once all fields are completed to your satisfaction, press the Continue button. Then click the Confirm and Submit button and add any notes as required.
Once you have selected the continue button you are then prompted by the Confirm submit button once you have selected this the request is then sent to the approver for the next step.

Once again after completing the process you are presented with a summary screen indicating the status of the request and who it is currently with. As in all requests you will receive an email confirmation regarding your request and your approver (in this case your supervisor) will also receive an email advising them that they have an outstanding action. You as the student can also check this status by viewing the main student page as shown below.
Re-Registration

- All students are required to complete the Re-Registration process. This is done through the PGR Manager system as follows.
- Select the Re-Registration button on the right-hand side of the screen as shown.
• You will be presented by the Re-registration overview screen.
• Select Create new application.

*Fig 36*

Re-registration overview

- Abby Norman
- By issue business moment study food lot by

Create new application

Application | Date | Status
--- | --- | ---

• Then select the Begin Re-registration process. Click Start to begin.

*Fig 37*

Begin Re-registration

- Please re-register for this year.

Would you like to start your re-registration process?
- Cancel
- Start

• You will be presented by the confirm project details screen.
• Check that your registration details are correct. Once checked, select The registration details are correct button.

*Fig 38*

Confirm project details

Please confirm the details, as shown below, are correct.
- Request changes
- The registration details are correct

<table>
<thead>
<tr>
<th>Student</th>
<th>Abby Norman</th>
</tr>
</thead>
</table>
| Supervisor | Dr Teodor Holland
Dr Ari Lambert
Dr Sher Carter |
| Research institute | Development, Policy & Practice (DPP) |
| Project mode | Full Time |
| Student Project Type | PhD |

<table>
<thead>
<tr>
<th>Date completed</th>
<th>Deadline</th>
<th>Reminder sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project start</td>
<td>27 Sep 2019</td>
<td></td>
</tr>
<tr>
<td>Re-registration</td>
<td>13 Sep 2020</td>
<td>13 Aug 2020</td>
</tr>
<tr>
<td>Project end</td>
<td>18 Feb 2021</td>
<td></td>
</tr>
</tbody>
</table>
Once presented with the Edit student form: Re-registration – student name Complete all tabs and click Save and continue after each tab, not forgetting to Confirm and Submit at the end.
Examinations

- To initiate the Examinations Process you (the student) are required to submit a Notice of Submission to The Graduate School which indicates that you are ready to submit your Thesis for Examination. This process is managed through the PGR Manager system as follows:
- Select the Examination Tab at the right of the main student screen as indicated below.

**Fig 40**

<table>
<thead>
<tr>
<th>Title</th>
<th>By issue business moment study food lot by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Abby Norman</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Dr Teodor Hulland</td>
</tr>
<tr>
<td></td>
<td>Dr Ariel Lambert</td>
</tr>
<tr>
<td></td>
<td>Dr Shar Carter</td>
</tr>
<tr>
<td>Student Project Status</td>
<td>Active</td>
</tr>
<tr>
<td>Project mode</td>
<td>Full Time</td>
</tr>
<tr>
<td>Project Type</td>
<td>PhD</td>
</tr>
<tr>
<td>Student Project Stage</td>
<td>Submitted</td>
</tr>
<tr>
<td>Date completed</td>
<td>27 Sep 2019</td>
</tr>
<tr>
<td>Deadline</td>
<td>13 Sep 2020</td>
</tr>
<tr>
<td>Reminder sent</td>
<td>13 Aug 2020</td>
</tr>
<tr>
<td>Re-registration</td>
<td></td>
</tr>
<tr>
<td>Project end</td>
<td>27 Sep 2023</td>
</tr>
</tbody>
</table>

- Once selected you will be taken to the Examinations overview screen

**Fig 42**

- The screen shows that you have initiated the Examinations process. Select the Create new button indicated by the blue arrow above, which takes you to the Examination screen. The information shown gives you a full overview of the
workflows that are required to complete the examination process. As the student you will only need to complete 2 to 3 of them; the other headers are for the various points in the approval process. As in all requests, email confirmations and status updates will be sent to you and the appropriate member of staff involved in the processes. Once you are presented with the Examination screen select the Start button as indicated below.

- Once you have started the process the next screen shown is the Notice to submit: Examination – student name screen, which gives you information regarding the status of your thesis submission. In this case the STATUS bar shows that the system is Waiting for notice.

- Select the Green dot in the tab Edit confirmation of notice to submit. This then allows you to complete the Notice to submit action.
• All fields in the tabs must be completed. Remember to Save and continue after each completed tab.
• Once you have Saved and continued, on the Thesis title tab you are now presented with an Edit confirmation of notice to submit: Notice to submit: Examination – student name tab
Again, all fields must be completed. Please ensure that all fields are completed otherwise you will not be permitted to continue to the next page.

Fig 45

Fig 46
• Once you have clicked the Save and continue button you will notice that the Viva tab has been opened and is ready to be populated with confirmation of which supervisor you would like to attend your viva as an observer (select No observer if you do not wish to have an observer present). Once completed select Save and continue as before.

Fig 47

Edit Confirmation of notice to submit: Notice to submit: Examination - Abby Norman

Fig 48

Progress: Notice to submit: Examination - Abby Norman

• To confirm your decision, select the Confirm and Submit notice on the Progress: Notice to submit: Examination – student name screen. If you wish to add any notes, then you can do so by adding them in the Notes box. Please also note that at each stage of any confirmation you have the flexibility to come back to complete the process at any stage, but once you Confirm and Submit your notice you are unable to amend.

Fig 48

• Once this process is confirmed your request is sent to your approver (in this case your supervisor) who will read your notice and confirm the details. Once this is confirmed, you will receive an email notification and you will be able to view the updated status in the main student page.
You will notice that when looking at the main Examination page that some changes have taken place. Firstly, you will notice that the Notice to submit shows that it has been received, and secondly that there are two notices advising you of the status of actions, in this case that the Exam panel nomination is in progress, and the Thesis submission is in progress. You will also notice that the Tasks notes have been automatically populated with the information you have provided regarding the notice to submit and the approval status.
The Exam panel nomination is completed by your supervisor as indicated. Your next step is to upload your Thesis to the PGR Manager system.

To upload your Thesis to the system please select the Thesis submission header on the right-hand side of the screen shot above as indicated by the blue arrow.
Once selected you are presented with the Thesis submission: Examination – student name screen. Select the Edit student form indicated by the blue arrow above.

Fig 53

Start the submission by entering the required information on all tabs, starting with the Thesis tab. Upload your thesis here as indicated by the blue arrow on the right. Once the upload has been accepted you will notice a confirmation document appears below the upload field. This is a confirmation that this upload has taken place. If this does not appear, repeat the process. Don’t forget to Save and continue once completed.
- The second Details tab appears, please completed all fields and selecting the tick box at the bottom of your screen. Save and continue.
- The Copyright screen provides you with information regarding copyright laws. You are asked to confirm that you have read and understood these and confirm your agreement. There is also an area at the bottom of the screen for you to add notes as appropriate.
- Once you have saved and continued you will be presented with a Viva details screen.
- Please select which supervisor you would like to attend your viva as an observer. If you do not wish anyone else to be presented, please indicate by selecting No observer. Save and continue.
The last tab is the Confirmation of your submission of your thesis. Please complete by ticking both boxes to confirm that you have read the information provided and you abide by it, and that you have abided by the institutional policies relating to research ethics.

Once done click Save and continue.

The system provides you with a summary sheet of all the information you have provided. If after checking you wish to remove, add or amend a detail, use the back arrow to revisit the page in question, amend, and save and continue until you get to the summary page once again.

Once you are happy that all information is correct click the green Continue button on the right-hand side of the screen.

Confirm and submit thesis.
• The final screen provides you with a STATUS update on where your request is and with whom it is currently with. As always email alerts are sent after every submission.

• To see the summary of the requests that have been completed on the Examinations process. Select the back option where you can review the process so far.
• You will notice that the panel now shows that the Notice to submit indicates Received, and that the Exam Panel Nomination and Thesis submission are still in progress. This means that the request moves on to the next approver (in this case the supervisor) for their authorisation.
• This completes the Examination process for students.
Further Information can be found on the Graduate School Network.

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

For any communication related to PGR Manager please email

pgrmanager@open.ac.uk