PGR Manager
Supervisor and Approvers Guide

Directly Support and
Affiliated Research Centres (ARCs)
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Logging in

- Logging into the PGR Manager system for the first time.
- To log into the system or the first time you will be presented with a Login Page as shown.

**Fig 1.**

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

- If you are a student from our **Affiliated Research Centres (ARC)** then you will be presented with this screen. Using your ARC email address supplied by your relevant ARC.

**Fig 2.**
Introduction and Supervisor View

- Once signed into the system you are presented with a Noticeboard Screen. To view all students that are assigned to you select the My Students screen on the right-hand side of the screen as shown.

Fig 3

This screen details the students assigned to the supervisor. Also shown on the screen shot is the status, mode, start and end of the student’s registration.

Fig 4

- This preview shows the status of all activities during the student journey, showing important dates as the student progresses.
- To view any student assigned, click on the student in question on the Experience: Supervisor name screen as shown below:
Once selected you are presented with the project details screen of the student you have selected. By selecting on the tabs on the right-hand side of the screen you can see the status of any action or activity that the student has requested and the status showing where in the process it lies. The screens will also show who the current request is with. Also noted on the screen is an overview of the Title of the student’s Thesis title, current supervisors, Students, Project Status, Project Mode, and important dates. This screen also shows any activities that are outstanding and/or requested.
Supervision Meetings

- The student or supervisor can add records on to the PGR Manager system as evidence of the meetings. Once the student has submitted their notes all members of the supervising team are issued with an email advising them of the recent addition to the system and that there is an action attached to it.

Fig 7

- Shown in the screen above is the submitted information to the supervisor from the student showing notes from the supervision meeting. Also noted on the right-hand screen in Fig 7 is the STATUS bar showing who the request is currently with and what action needs to be taken. In this instance this request shows that the STATUS is Waiting for Prof Lyn Carter to review the notes.
- To note the student can also see the STATUS and who the request is with.
- Once the supervisor Prof Lyn Carter signs into the system she will notice a new task/request at the top showing that she has 1 Task to action. Also noted in the Recent additional field that this also shows an outstanding task.
Either selection can be made I have chosen the Recent additions function which shows.

Once accessed you (the supervisor) are asked to confirm notes which are indicated by the green dot confirm notes on the right-hand side of the screen as indicated by the blue arrow. You can also review the notes in a different format by clicking the Supervision notes on the right-hand side or you may wish to Download printable PDF as indicate on the right-hand side.

Once you ready to approve and confirm the notes select the green dot to Confirm notes. As indicated below.
Once confirmed you are presented with the Confirm: Supervision meeting – date and student name screen.

Where, as the supervisor you can confirm the notes. You can also provide any additional notes here, bearing in mind that the student and other supervisors can read the notes (as indicated in the box) by the Private notes below the Notes screen is a private Staff Only screen that can only be seen by members of the staffing team.

Once happy to confirm. Select the Confirm button.

Fig 11
• Once confirmed the Status bar changes and advises you that the Meeting notes are confirmed. Please note as previously advised, that this function can be initiated by any member of the supervising team or the student. Supervision notes stay on the system and can be reviewed at any time. There is also an archive system so all previous notes for the student can be reviewed and downloaded as appropriate throughout the student journey.
• All supervisors are obliged to confirm the notes using the same process as above. Email confirmations to all supervisors and student take place throughout the functions until all are completed.

Change requests

• A change request is are typically submitted by the student or supervisor to request a change to registration e.g. study break, extension and change of mode and attendance etc. Upon approval, project dates and status are updated.

• You (the supervisor) will notice that on your Experience: supervisor name screen that there is an outstanding task for one of your students.

• Select the Tasks button as shown. This task is showing that you have an outstanding action for your review and approval. In this case a Study Break for student name.

Fig 12

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

Fig 13

• •
• Once selected the Study Break – student name appears showing the STATUS – Waiting for supervisor to review is shown and whom the action is currently with. In this case the task is with Tamarra Giles who is the student’s supervisor.
• Also noted on the screen under the Tasks box is the current action awaiting review and any historical events relating to the student journey.
• You the supervisor can at this point delegate this task to another member of the supervisory team or the other members of the team can also take this task for approval. To delegate the task, select the Delegate the task button on the right-hand side of the screen.
• All member of the possible supervisors who can undertake this task are shown on the Delegate: Study Break – student name screen as shown below.

Fig 15

Delegate: Study break - Mr Aamir Butcher

• Select the appropriate supervisor to delegate the task to.

To delegate the task to another member of the supervising team select this button and delegate.
• A prompt is displayed for the approver to confirm that they task is to be taken over.
• In this instance Dr Duffy Warren.
• Once selected the delegate needs to confirm that this task is to be taken over.
• Select Take over button on the Take-over: study break student name screen

**Fig 16**

**Take over: Study break - Mr Aamir Butcher**

Would you like to take over this task?

[Cancel][Take over]

**Fig 17**

Once ready to approve. View the study break request by selecting the Application field Change request form. Which enables the approver to review the task approve/decline information within it. The request can also be sent back to the student if the information provided is incorrect etc.

Once selected all details entered by the student can be reviewed here. Once happy to approve select the back arrow on the left of the top of the screen, which takes you back to the approver screen once again.
Once happy with the approval select the green button Submit supervisor review screen.

As indicated on the Edit Supervisor form: study break – student name screen. Add a statement in support of this request and include information about the student’s progress as indicated in the required field.

Don’t forget to Save and continue to confirm your approval. You (the supervisor) will be asked to confirm the details and once happy to approve select the green Continue button.
To confirm the approval, select the Confirm Progress button and add any notes as appropriate, noting that the student can see the notes box.

Once the approver in this instance the supervisor has approved the request. It is then passed up the chain to the next approver for their authorisation. In this case this is an Affiliated Research Centre, student so the next step is for the ARC Coordinator for their approval.

**Affiliated Research Centre students only**
As you can see from the STATUS field that the action is Waiting for ARC Coordinator to review the task and approve/decline as appropriate.

The ARC Coordinator will be issued with an automated email informing them that a task is waiting for action. And shown on the system in the Tasks bar at the top of the screen as shown.
• Select the Tasks button to view the task request. Once selected it shows an outstanding task for a Study break – student name.

• Select the Study break as shown

Fig 25

<table>
<thead>
<tr>
<th>Study break - Mr Aamir Butcher</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td><strong>Project</strong></td>
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<tr>
<td><strong>Student</strong></td>
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<td><strong>View type</strong></td>
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<td><strong>Supervisor</strong></td>
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<tr>
<td><strong>Status</strong></td>
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<tr>
<td><strong>Currently with</strong></td>
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<tr>
<td><strong>Options</strong></td>
</tr>
<tr>
<td><strong>Application</strong></td>
</tr>
<tr>
<td><strong>Assessment</strong></td>
</tr>
</tbody>
</table>

• As with the supervisor approval the process is the same in selecting the Application field, Change request form to review as shown.

Fig 26

To review the change request, select change request form here

• Again as in the previous approval review the request and once that you are happy with the content select the back arrow as shown above to return to the main screen where you are presented with the green submit endorsement button.
Once submitted the request. You the ARC Coordinator are presented with an Edit ARC Coordinator for: Study Break – student name screen.

Select the I endorse this request or I do not endorse this request and add notes as appropriate. Not forgetting to Save and continue.

If I do not endorse this request is selected this form is sent back to the previous endorser for their amendments and all processes from the approver prospective are to be repeated.

To complete the task check the information provided and select the green Continue button as indicated below on the Review: Study break screen.
Once confirmed complete the process by selecting the Confirm: Progress button and adding any notes as appropriate.

Both Directly Support and Affiliated Research Centres

The request is then passed to the Research Degrees Team for their review and comments.
Affiliated Research Centres ONLY

- The next step for ARC’s is for the ARC Management Group to approve the request. The Research Degrees Team review this request and assign the Chair or Deputy Chair of the ARCMG group to review the request.

Fig 32

- Once the selection is made this approval is moved onto the ARCMG level for approval.

- As in all tasks the task bar will show the outstanding tasks for review.

Fig 33

- As in previous approvals to view the form select the Application field and Change request form to view the completed request.
Once the review of the form has taken place and the approver is happy to endorse select the green submit button.

Fig 35

- Once recommended don’t forget to Save and continue.
- Check that all the information is correct and select the green Continue button

Fig 36

- To complete the task select the Confirm and Progress button and adding any information as required.
So far, the student has submitted their study break, it has been approved by the supervisor, been sent to the DAD for directly supported students ARC Coordinator (if ARC) then to the ARCMG (if ARC). Then all were sent to the Research Degrees Team for comments.

In the case of a Study break the last approver is the Graduate School Director.

The Graduate School Director as in the case of all approvers, will be sent an email advice of an outstanding task. As in previous approvals the Task bar is opened to see what tasks are outstanding.
• As you can see there are outstanding tasks awaiting approval from the Graduate School Director. We are looking for a Study break for Amir Butcher shown at the bottom of the screen.
• Select this Study Break which opens up the view for the student in question.

Fig 39

Tasks here show the student journey for the current request, the approvers and who the request is currently with.

• Noted on this screen the Graduate School Director (GSD) has the option of delegating the task, progressing, return to submitter, return to supervisor, return to ARC Coordinator etc. If the return to options are selected then the process from that point is to be actioned. Also to note on this screen that all actions so far for the student are listed.
• In this instance we are going to Progress this application by selecting the green button Progress as indicated by the blue arrow above.
• The GSD can then select to authorise or not authorise the request as appropriate or refer back for amendments.
• Save and continue.
• Once approved the GSD is presented with a Study Break dates screen which allows the GSD to add new dates for study. This includes Start date of the study break, the length of the study break and the expected date of return to study. This is confirmed
• Noting that study breaks can be made during mid month.
• And the main screen shows the authorised STATUS of the request and updated on the students project.

Fig 41

• If the Graduate School Director sends the request back to the supervisor or student the student/supervisor will see the change request back in their queue informing them of changes required. The process of submitting the change request again follows the same route as before.
• All change requests work in the same way and follow the same routes. At each level of authorisation and email is sent to the student/supervisor/approver to indicate a task is awaiting action. Also noting that the students profile is updated with the task showing its status.
Absences

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

*Fig 42*

- Once you have opened your profile you will be presented with any outstanding actions/tasks as seen above. Open the appropriate task; in this case the Absence request for Aamir Day.
As in previous change requests you will be presented with a Status table showing who the task is currently with and the actions available as an approver. In this case we want to review the request so select the green button Review request. Once selected you will be able to view the request made by the student.
• Select the green button Continue to access the approval screen. You can then select the appropriate decision screen as indicated below.

**Fig 45**

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

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

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

**Fig 46**

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

- **Approve the absence request**
  Confirm. Approve request  Cancel

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

• Once confirmed the STATUS changes to Approved or not approved depending on decision made.
Once again the approver can reject the request and refer it back to the student for amendments. It can also be cancelled as necessary.

**Upgrade**

- All students are required to complete the upgrade process before their 1st anniversary. Once the student has completed the Upgrade process as in all requests you (the supervisor) will be emailed advising you that there is a task for processing.
- Go to your task bar as before and select the appropriate task, in this case the Upgrade for the student in question.

Fig 48

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

This window shows the request being made and what date is was submitted.
• Once selected you are presented with an Upgrade overview screen of the student you have selected. To view the request select the green button Edit supervisor form on the right hand side of the screen as indicated above.

• As the supervisor you are then presented with 2 tabs which need to be completed. You are asked to complete these fields to confirm your student's profile.

• All fields are required to be completed.

Fig 49

Once all fields are completed don’t forget to Save and continue before moving to the Ethics tab.
Once you have completed all the fields and uploaded any relevant documentation as requested you can Save and continue.

As before in other requests you will be able to view the screen. Once you are happy with the information select the green Continue button to confirm action.
• Confirm as appropriate and add any notes if required noting that the student can see the notes entered here.

Fig 52

• You are now in the Upgrade process. Please complete all tabs shown here remembering to Save and continue at each stage. Noting that in the Absences and Project report tab that there is a required Upload file field required. If the information is sensitive and or confidential you can send this directly to the Research Degrees Team in confidence. This will not be shared with any parties.
• Do not forget to Save and continue to move to the next tab.
• You will be presented with a Progress tab. Please include your supervision meetings here and entering your training events etc as indicated in the fields. All fields are required to be completed. Last but not least you will be required to complete the Objective fields. Once again these fields are all required to be completed. Once completed you can check your entries, once you are happy that all fields are completed to your satisfaction press the continue button. Then click the Confirm and Submit button and add any notes as required.
• Once again after completing the process you are presented with a summary screen indicating the status of the request and who it is currently with. As in all requests you will receive an email confirmation regarding your request and your approver (in this case your supervisor) will also receive an email advising them that they have an outstanding action. You as the student can also check this status by viewing the main student page as per below.

Fig 55
The Admin teams within the faculties appoint the accessors for the mini viva as follows:

Following an email advising the Administrators in the faculties that there is an outstanding task for them to complete. They can review this task by selecting the task bar in PINK at the top of the screen.
Once reviewed they can appoint the assessors by selecting the Green Appoint assessors button on the right-hand side of the screen as shown above.

Fig 57

Add in the assessors details if not pre populated a manual entry can be made. You can also add another assessor by selecting the Add another button shown by the blue arrow. There are 2 entries required here then save and continue.

You are then prompted by a Regulation screen which asks you to confirm that you have read the regulations and that you can confirm that the application does not have any conflicts of interest associated with the application.

Once confirmed save and continued as before.

Fig 58
Fig 59

- Check the information you have provided is correct and continue

![Progress: Upgrade - Mr Aamir Day](image)

- Confirm: Confirm assessors selection.
- This is On hold until the viva date is confirmed. Once the viva dates has been agreed, select the Green button Edit viva date and add the date of the mini viva.

Fig 60

![Upgrade - Mr Aamir Day](image)

Fig 61

![Edit Mini viva: Upgrade - Mr Aamir Day](image)
- Enter the mini viva date here then Save and continue.
- Once this is completed all of the assessors post viva are required to submit a report. An email is sent to all assessors for the reports.

Fig 62

Viva scheduling: Examination - Abby Norman

- Once the mini viva has taken place the green Confirm Viva occurred button can be selected as above.
- The confirmation is just a confirmation screen which requires selecting and adding notes if required.

Fig 63

Progress: Viva scheduling: Examination - Abby Norman

- For more details regarding the Administration role for the Upgrade process please review the PGR Manager Faculty Administrator Guide available on the GSN and Microsoft site.
Re-Registration

- All students are required to complete the Re-Registration process. This is done through the PGR Manager system, once the student has completed their Re-registration you as the DRD/DAD will be emailed with a task for actioning.
- Open the task in the usual way. Where you will see the outstanding task ready for your action and comments.

Fig 64

To view the re-registration request, select the green Progress application button on the right-hand of the screen as show above.

Fig 65
Please complete all fields not forgetting the Save and continue once done.

Fig 66

Once completed Confirm: Progess the re-registration.
Once completed the request moves onto the Research Degrees Team for their comments and approval. Once this has been confirmed by the Research Degrees Team the student will notice the STATUS and Approved on their My project view and giving reminder date for the next re-registration reminder.

Fig 67
Examinations
The view above shows the students submission of the thesis and shows with whom the task is now with, also noted on this screen is the STATUS is Pre-examination. The tasks listing shows all information and actions to date and where the examination is in the process.

The next stage is for the supervisor to review the task and approve. An email alert is sent to the supervisor indicating that there is a task awaiting action.

Select the task bar and select the outstanding task for the student in question.
You as the supervisor will notice that the STATUS is awaiting supervisor declaration form.
It also states who the current task is with.
To edit the supervisor’s candidate declaration form, select the green button shown above.
• The supervisor is then required to complete all fields not forgetting to Save and continue once completed.

• Once completed and saved you will be prompted to check your details and continue by selecting the green button.

Fig 72

![Image of the Thesis submission screen](image)

Fig 73

![Image of the Progress: Thesis submission screen](image)

• Once completed you will be presented with a Progress: Thesis submission screen, where once happy with your selection you can Confirm: Submit declaration. You can add notes at this point bearing in mind that they can be seen by the student.
• Once completed you will notice that the Status bar advises you that it is awaiting a supervisor declaration form. All supervisors that are assigned to the student are required to complete this form and will not move on to the next step until all supervisors supply the form following the steps just covered above.

• Once all supervisors have completed the declaration forms the system prompts the action of the RDT/ARC Coordinator for their review.

Affiliated Research Centres Only

Fig 74

<table>
<thead>
<tr>
<th>Thesis submission: Examination - Abby Norman</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Student</td>
</tr>
<tr>
<td>Supervisor</td>
</tr>
<tr>
<td>Import</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Academic year</td>
</tr>
<tr>
<td>Submitted tasks</td>
</tr>
<tr>
<td>Delegated task</td>
</tr>
<tr>
<td>Reviewed RDT/ARC coordination review</td>
</tr>
<tr>
<td>Refer to RDC</td>
</tr>
<tr>
<td>Return to supervisor</td>
</tr>
<tr>
<td>Application</td>
</tr>
<tr>
<td>Student form</td>
</tr>
<tr>
<td>ASSESSMENT</td>
</tr>
<tr>
<td>Supervisor candidate declaration form</td>
</tr>
<tr>
<td>Application</td>
</tr>
<tr>
<td>Student form</td>
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<tr>
<td>Delegated task</td>
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<td>Reviewed RDT/ARC coordination review</td>
</tr>
<tr>
<td>Refer to RDC</td>
</tr>
<tr>
<td>Return to supervisor</td>
</tr>
</tbody>
</table>

• As an ARC coordinator you can view this task by selecting the Green review/edit RDT/ARC coordinator review button as indicated above.

• You are then prompted to confirm the process has been completed and that all regulations have been followed on completion of the form.

Fig 75

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

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

☐ Yes

☐ No

Hardcopy thesis posted to examiners

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

Save and continue  Save for later
• Once the student has completed the Notice of Submission and all the supervisors assigned to the student have also submitted their declarations the student’s Examination Panel are to be selected. The selection to start the process is made from the task made in the email alert notification.

Fig 76

• Once selected you will be presented with the Exam Panel Nomination screen.
• At this point the task can be delegate to another member of the team by selecting Delegate this task or indeed can be taken over by any member of the team assigned to the student.

Fig 77
• To progress the task, select the Green Edit exam panel nomination button on the right-hand side as indicated above.

Fig 78

![Edit Exam panel nomination: Exam panel nomination: Examination - Abby Norman](image)

Fig 79

![Edit Exam panel nomination: Exam panel nomination: Examination - Abby Norman](image)

- The Internal Examiner tab asks for information regarding the internal examiner, supervisions, and completions. All details must be included as instructed on the form. Also required is the full CV which again, must tie up with the supervision experience. Upload CV here and save and continue to the next screen.
- The next screen is like the Internal Examiner. Complete all fields as required but must include the supervisory experience and full CV.
- The final tab asks for information on the panel. All fields are required. If when asked to supply information on the observer who are not on the system, there is a function that allows for manual entry on this tab. Complete as required.

Add name of Chair from pre-populated list. If the Chair is external, then the details can be added manually.

Please ensure all supervision details are completed accompanied by the full CV. Information must agree on system and CV.
Once all tabs are completed select the Confirm: Submit form to confirm.
• After confirming the Examination Panel, the DAD/DRD/ARC Coordinator are informed of an outstanding task by email.
• Select the task in the normal way by selecting the Tasks button at the top of the screen in the Pink area. Then select the action pending in this case the examination of student name.

Fig 82

• To action and progress the task select the Green Progress button on the right-hand side of the screen as indicated above.
Once happy with the content select the Green continue button to progress.

To complete the process, select the I endorse the examination panel and Confirm: Progress.

The next step of the process moves to the Research Degrees Team who confirm, right to work checks, and can return forms to the supervisor or DAD/DRD or ARC Coordinator as for amendments if required. The examination panel nomination then is passed to the Research Degrees Committee Chair for approval.

After receiving an email advising RDC that there is a task for this student. It can be selected from the task bar at the top of the screen in PINK as before. The task in question can be selected from a drop-down list. In this case an examination panel nomination for student name.
At this point the RDC Chair can delegate this task to the Deputy Chair or the Deputy Chair can take over the task as required.

RDC can view the form by selecting the Application Exam panel nomination as indicated by the blue arrow above.

Once selected RDC Chair can review the information provided and make a decision on whether to approve or return to the supervisor/DAD etc for amendments. To return to the main screen the back arrow is selected at the top left-hand side of the screen.

To Edit the proposal, select the Green Edit research degrees committee decision button on the right-hand side of the screen as indicated above.
Fig 86

• RDC can now authorise or not authorise the request. Notes can also be added here for clarification or amendments as required. Save and continue
• Then select Confirm: Progress the application.

Fig 87

• You will notice that the STATUS has now changed to Approved which means that the Examination Panel nomination has been accepted and approved. You will also notice here that the tasks listed at the bottom of the screen have been updated with information to the process during the examination selection and approvals.
• To complete the process the viva voce needs to be scheduled. This task is completed by the Chair who has been notified by email that there is a task awaiting action.
• The Chair can now select the student and begin adding the details of the viva.
• The Chair can delegate this task as in previous tasks. To schedule the viva the Green Schedule viva selection is made. Showing 5 tabs all, of which need to be completed.

• Once all fields are completed Save and continue and move to next tab. Examiner arrivals.
• Once Saved and continued. The next tab is the catering requirements. Once completed you are presented with the Attendees tab.
• All attendees are listed here with any additional information added as required.
• Once completed save and continue.

• The last tab is the special arrangements tab. Please complete as required.
• This completes the Examination scheduling ready for the viva.

For further information regarding Examinations processes post viva are available in the Examinations Guide available on the Graduate School Network and Microsoft Teams PGR Manager site.
Further Information can be found on the Graduate School Network.
http://www.open.ac.uk/students/research/

For any communication related to PGR Manager please email
pgrmanager@open.ac.uk