

## How to.....in GRAD?

## Postgraduate Researchers

GRAD has been built to be fairly intuitive, but some Postgraduate Researchers (PGRs) and academic staff have found some areas difficult to navigate.

Here is a simple guide to how to find your way around the system. If you are still having difficulties please speak to your SES PGR Support Officer.

### Project Page

This holds all the basic details of the studentship, including Supervision Team, PGRT and main SES PGR Support Officer for the School.

From this page the PGR can start Supervision Meetings, formal progression reviews like Transfer and First Formal Progress Review, Training Activities, and Change Requests.

It holds details of all the deadlines in place for the studentship, and all the activities that have happened within the system.

The screenshot shows the 'Doctoral Research Project' page in the GRAD system. It features a navigation menu on the left with various faculties and departments. The main content area displays key details: Title (Doctoral Research Project), Researcher (redacted), Supervisor (redacted), Main supervisor (redacted), Postgraduate research project status (Registered), Project mode (Full Time), Postgraduate research project type (MPhil), Postgraduate Research Tutor (redacted), Fee status (Home), Year of Study (01), Student ID (redacted), Research Institute (Pure Mathematics), Postgraduate Research Administrator (Mrs Kirsty Clarke), Start date (01 Jan 2017), Deadline for decision on FPPR, Deadline for decision on Transfer, Deadline for decision on APR, Expected thesis submission date, and Maximum time limit for thesis submission (30 Sep 2018). On the right side, there are several tabs and buttons: Project history, Project dates, SUPERVISION (Supervision meetings, Supervisory team), Change requests, DEVELOPMENT (Training needs, Training plan, Events), View data in PDR, and Project files.

### Supervision Meeting (previously known as Monthly Reports)

This section allows you to see how many meetings have taken place during each academic year, and if an action is needed. In this example, the PGR has created a Supervision Meeting but not yet completed it.

It is from this page that the Supervision Meetings are started, by clicking the "New Supervision Meeting" button.

The screenshot shows the 'Project supervision: Doctoral Research Project' page. It displays the project title and a redacted researcher name. Below this, it states 'These meetings are being planned or written up:' followed by a list of meetings, including 'Supervision meeting - 22 Feb 2017' with a redacted name. A 'New supervision meeting' button is visible. At the bottom, there is a summary for the year '2016 - 2017' showing '7 meetings...' with a plus sign icon.

The screenshot shows the 'Edit Supervision notes: Supervision meeting' form. It includes a 'Participants' section with a redacted name and a checkbox. Below this is the 'Date, time and location' section, which contains fields for 'Meeting date', 'Meeting time' (with a placeholder '(HH:MM (if known))'), and 'Location'. The 'Meeting format' section has radio buttons for 'In person', 'Telephone', 'Email', 'Video conference', and 'The meeting did not take place'.

The first thing you are required to do is decide who is attending, i.e. which supervisor(s) (and Advisor if appropriate). The meeting date would need agreeing, and the time and location if known at this point.

You have several methods of holding a Supervision Meeting; in most cases it will be In Person, but other formats are available if you or your supervisor are not on campus.

You will be asked to add some Discussion Notes, which relates to your progress over the last month, any successes or issues, if you've been to a conference and what you gained from it. Basically everything you want to discuss with your Supervisor at the meeting.

There will also be an opportunity to upload files to share with your supervisor during the supervision meeting.

Once the meeting has taken place you will need to “Edit Meeting Notes” with the outcomes of the meeting and any plans moving forward. When you are happy with the whole submission you should “Confirm Notes”.

Please confirm that you wish to make these notes as correct.

Confirm: Submit notes Cancel

Notes

If you have any issues you’d like to note, this section allows you to do so. If you don’t, you should leave this section blank and just click “Confirm: Submit Notes”.

An email will then go to the Supervisor who attended the meeting requesting they confirm the content of the meeting record. They can also edit it if they’re not happy with the content. They will then either “Accept” or “Ask for Revisions”. They will also have an opportunity to leave some notes, which you will be able to see.

**STATUS**  
Meeting notes gathered, waiting for [redacted] to submit for approval.

Edit meeting notes  
 Confirm notes

Supervision notes

Meeting did not take place

**CHECKLIST**

- Date scheduled
- Researcher’s notes
- Meeting has taken place
- Action points

**STATUS**  
Meeting notes agreed

Add follow-on note

Supervision notes

If your supervisor has left a note on your report, you can read this in the Supervision Notes section. You can also leave a “Follow-On Note”, which can be especially useful if your report has been edited by your supervisor, or you want to add something you forgot earlier.

### First Formal Progress Report

When you are ready to start this stage, the first thing you’ll see is some information about the First Formal Progress Report, and who takes part in the process.

You will also be asked to confirm you project details, and request changes if the details listed has errors.

Confirm project details

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

Request changes The project details are correct

Title [redacted]

Supervisor [redacted]  
Main supervisor

Student ID [redacted]

Project mode Full Time

Postgraduate research project type Provisional PhD

	Date	Deadline
Project start	01 Feb 2017	
Project end		31 Jan 2020 — 31 Jan 2021

Progress Ethics

Please provide a review of your progress \*

Are there issues that have adversely affected your progress and need to be taken into consideration? This might include academic, personal or support issues \*  
 Yes  No

If yes, please provide a brief explanation

Drag files here or choose file...

Save and continue Save for later

Progress Ethics

What follows is two tabbed sections “Progress” and “Ethics”.

Progress: this is your opportunity to state how you’ve progressed since you arrived, and includes a section where you can put anything which has affected your studies, e.g. ill health, not being able to use certain equipment, etc.

At the bottom of this section you should “Upload” your written report. This will be downloaded by your Supervisor to read, so there’s no need to submit hard copies.

Ethics: You should state here if an Ethical Review is required. If you are not sure, speak to your Supervisor.

Progress Ethics

Is it anticipated at this stage that ethical review will be required? \*

Yes, ethical review is likely to be required  
 No, ethical review is unlikely to be required

If ethical review is required, has ethical approval been granted?  
 Yes  No

If ethical review is required but approval has not yet been granted, please indicate what steps are planned or have been taken to secure approval

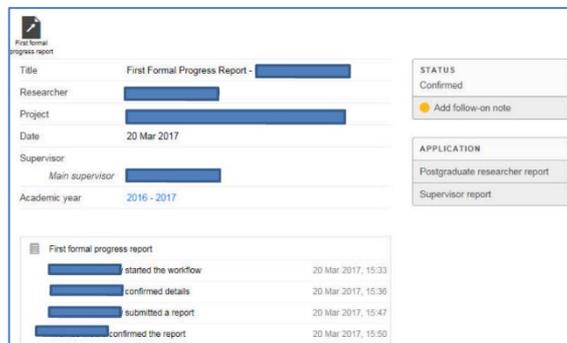
Save and finish Save for later

Progress Ethics

If at any time you want to leave your First Formal Report to return to later, you can do so by clicking “Save for later”. You will be able to return to it by going back to the First Formal Progress Report section and selecting the report.

Once you’ve uploaded your written report and completed these two sections, you should click “Save and Finish”. Again you will have an opportunity to write some notes on the report before you click “Confirm: Submit Report”.

When you have finally submitted your First Formal Progress Report, and email is sent to your Supervisor to alert them. They will read your submission and your written report, and submit their own assessment of your progress, before confirming that the report is complete and submitting it.



You will then receive an email letting you know your First Formal Progress Report has been completed.

You are encouraged to read the “Supervisor’s Report”, and the “Add Follow-On Note” section is there for you to add further thoughts or comments, or even upload a new version of your written report, if required to do so.

## Transfer

As before, when you click on the “Transfer” button and you “Create new application” you are taken to a page which tells you all about what Transfer is and how it works, and when you’re ready you should click “Start” to complete and upload your report. You’ll also need to confirm that the project details within the system are correct before you can go forward.

There are three sections to go through this time:

### Progress

### Ethics

### Academic Integrity

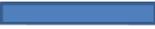
Note: You will not be able to submit your report until you upload your written Transfer Report in the Progress section.

Once again you will be given the opportunity to highlight any issues with the PGRT in the Progress section, and add some notes at the end before you “Confirm: Submit report”. At this point an email will go to your Supervisor for their actions:

- a) Confirm date and other details of the Transfer Viva
- b) Submit details of who the members of the Transfer Assessment Panel are.

Once you’ve had your viva, the Chair of the Transfer Assessment Panel will submit their report on both your viva and your submitted report, which will then move on to the PGRT.

Remember, you can always tell where in the workflow your report is by looking at your Transfer summary page:

Tasks		
Transfer		
Waiting for PGRT to review		
	confirmed details	20 Mar 2017, 16:20
	submitted the application	20 Mar 2017, 16:30
	submitted the panel report	20 Mar 2017, 16:37

<b>STATUS</b>
Waiting for PGRT to review
<b>CURRENTLY WITH</b>
Julian Pittard (PGRT)

The final step in the workflow is once the PGRT has submitted their response, and it then says Awaiting Graduate Board Programmes of Study and Audit Group meeting. This is the board who approves Transfer, and it is only following their approval that you will be formally transferred to PhD status.

### Annual Progress Review

To submit an Annual Progress Review, you must again go through the information and project confirmation pages. These are straightforward, and only need action if there is an amendment needed on the “Confirm project details” page.

#### Progress report

Progress report | Issues | Upload documents

Please provide a review of your progress, including details of any completed research and/or writing up of your thesis to date. Please concentrate on the progress made since the transfer stage or last annual progress review. \*

Save and continue | Save for later

Progress report | Issues | Upload documents

#### Issues

Progress report | Issues | Upload documents

Are there issues that have adversely affected your progress and need to be taken into consideration? This might include academic, personal or support issues. \*

Yes  No

If yes to the above, please provide a brief explanation

Save and continue | Save for later

Progress report | Issues | Upload documents

#### Upload documents

Progress report | Issues | Upload documents

Please upload the following documents:

- Plan for completion of the research and thesis (e.g. Gantt chart)
- Written work as required by the faculty/supervisor(s) for the annual review
- Thesis plan (optional - only if required by your faculty/supervisor)

Drag files here or choose file...

Save and finish | Save for later

Progress report | Issues | Upload documents

You have an opportunity to state if there have been any mitigating circumstances which needs highlighting as part of your review, upload the required written documents (as listed on the website for your year) and add some notes at the end before you “Confirm: Submit report”.

Your Supervisor will receive an email alerting them to you having submitted your Annual Progress Review. It is their responsibility to add the date and other details of the review meeting. Remember, this meeting is attended by you, your Supervisor and an independent Assessor.

Once the meeting has been held, the Independent Assessor will submit their report on your progress, and you will receive an email confirming that the Annual Progress Review is complete.

## Training Needs and Plan

Unlike in the PDR, you are no longer expected to submit a form with all of courses listed that you think you may need during the year, because with GRAD you need to input them as separate activities.

As before, it is recommended that you complete the Training Needs analysis tool which will help to identify training needs based on skills areas. It is expected that you would complete this every year, to identify new areas as your skills levels increase.

Following this, you should meet with your Supervisor (probably at a Supervision Meeting) and go through your list of training, as your Supervisor is expected to approve your training before you take part.

When you are ready to add a training opportunity, you should click "Create New" in the "Training Plan" section.

Completing this section is relatively straightforward, and you get the opportunity to go back in after you've attended the event to add some Reflections on it.

You can also see a list of everything you've attended

Please keep your training plan up-to-date throughout your project.

Development need	Date identified	Date completed
<a href="#">Mathematical Methods lecture course</a>	12 Oct 2016	11 Jan 2017
<a href="#">Unix course on programmingforresearchers.leeds.ac.uk</a>	16 Oct 2016	16 Oct 2016
<a href="#">Fortran course on programmingforresearchers.leeds.ac.uk</a>	24 Oct 2016	24 Oct 2016
<a href="#">Linux Training Course</a>	31 Oct 2016	31 Oct 2016
<a href="#">Hydrodynamic stability course</a>	30 Jan 2017	
<a href="#">Linear and non-linear waves course</a>	30 Jan 2017	
<a href="#">Numerical methods course</a>	30 Jan 2017	

### Create new

Development need \*

What skills do you already have in this area? \*

What skills do you need to develop in this area? \*

Development support identified (training courses, etc) \*

Files

Drag files here or [choose file...](#)

Expected date of completion: \*

Date completed:

Reflections on completing this development objective:

[Delete](#)

[Add another](#)

## Change Requests

At present there are three types of change requests that you can put forward:

### Request holiday

You will be asked to confirm your project details are correct, and then add the start and end date of your holiday, and confirm the statement on holiday entitlement. Before you "Confirm: Submit" you can add a note to accompany your request if you wish.

Your request will be checked by the SES PGR Support Officer, your Supervisor and the PGRT before it can be approved, so early submission is recommended.

Start date \*

End date \*

I understand that the University entitles PGRs, with the prior agreement of their supervisor(s), to take up to 25 days holiday each year as well as the time during which the University is officially closed. The University is normally officially closed for at least 14 days each year (during the Christmas and Easter periods and bank holidays). It is my responsibility to check my annual leave entitlement with my sponsor and not to exceed this.

## Request authorised absence

You will be asked to confirm your project details are correct, and then add the start and end date of the period of authorised absence. In addition, you will need to state where you are going and the reason, e.g. attending a conference, using specific laboratory equipment in another institution, visiting the industrial partner for your project, etc.

There are two statements you need to confirm, both of which you should read before confirming and submitting your request.

Your request will be checked by the SES PGR Support Officer, your Supervisor and the PGRT before it can be approved, so early submission is recommended.

The screenshot shows a web form titled 'Change authorised absence form' with a 'Confirmation' tab. The form contains the following fields: 'Start date \*' (text input), 'End date \*' (text input), 'Location \*' (text input), and 'Reason for absence \*' (text area). At the bottom, there are two buttons: 'Save and continue' and 'Save for later'. The form is framed by a blue border.

## Request change of location

This request is only for Tier 4 Visa holders who wish to leave the UK and continue their study overseas while either a) undertaking field work, for b) are in their overtime period.

You will be asked to confirm your project details are correct, and then add the details required.

You will be expected to confirm how you intend to keep in touch with your Supervisor, and the consequences of having Tier 4 sponsorship withdrawn.

It is recommended that you seek advice from the [International Student Office](#) before completing this request to ensure your visa requirements are followed.

Your request will be checked by the SES PGR Support Officer, your Supervisor and the PGRT before it can be approved, so early submission is recommended.

The screenshot shows a web form titled 'Request' with 'Supervision' and 'Confirmation' tabs. The form contains the following sections: 'Please complete one of the options below:', 'Either', 'I will be undertaking a period of fieldwork outside the UK as follows:', 'Start date' (text input), 'End date' (text input), 'Location (town/city/country)' (text input), 'Or', 'I will be leaving the UK during my overtime period:', 'Date leaving UK' (text input), 'Comments' (text area), and 'Location (town/city/country)' (text input). At the bottom, there are two buttons: 'Save and continue' and 'Save for later'. The form is framed by a blue border.

## **Help and Support**

In addition to this page, there are some helpful guides available from GRAD. They take you step by step through the stages for all the progression points and Supervision Meetings, and Training and Development.

If you are still having issues, speak to your SES PGR Support Officer:

Chemistry [chmpgradmin@leeds.ac.uk](mailto:chmpgradmin@leeds.ac.uk) Food Science and Nutrition [fsnppgradmin@leeds.ac.uk](mailto:fsnppgradmin@leeds.ac.uk)  
Mathematics [mthpgradmin@leeds.ac.uk](mailto:mthpgradmin@leeds.ac.uk) Physics and Astronomy [phyppgradmin@leeds.ac.uk](mailto:phyppgradmin@leeds.ac.uk)

Alternatively if you have a technical problem with the system, you should contact [University IT](#)