



# MANAGING THE RESEARCH STUDENT LIFECYCLE IN CAMPUS SOLUTIONS.

SESSION 2015

Monday 16 October 2017

# PRESENTER

Paula Leadon

Queens University Belfast

p.leadon@qub.ac.uk

- Over 12 years experience working across Schools and Directorates within the University
- Functional Development Lead since 2012
- Worked with Campus Solutions since 2008
- Specialising in the Student Records and Financial Aid Modules
- Prince 2





# YOUR ORGANIZATION

Established by Queen Victoria in 1845

The University is an international centre of research and education rooted at the heart of Northern Ireland with approximately 23,500 students.

The University is a member of the Russell Group of 24 leading UK research-intensive universities.

EMEA ALLIANCE 16- 17 OCTOBER 2017



# QUEENS & ORACLE

Campus Solutions locally branded as Qsis, implemented 2007 – 2008

Using all core modules

Campus Solutions v 9.0  
PeopleSoft V8.54.07  
Bundle 45

# SAFE HARBOUR STATEMENT

The student information used throughout this presentation is purely fictional and was created solely for the purpose of the presentation.

# CONTENTS

1. Project Background
2. Project Objectives
3. Project Scope
4. Milestones – Milestones Configuration Page and Milestone Process
5. Dashboards – Academic, School/Head of School Approver and Student
6. Digitisation of Paper based processes including Initial Review, Differentiation, Annual Progress Review and Record of Formal Meetings
7. Consumption

# PROJECT BACKGROUND

1. Phase 1 of the Research Student Lifecycle Project went live in June 2014 and focused on the Thesis and Examination Management elements of the Research Student Lifecycle including the following processes:
  - Intention to Submit
  - Nomination of the External Examiners
2. The current phase focuses on the overall Research Student Lifecycle including the standardisation of core processes

# PROJECT OBJECTIVES

## Experience

- Provide an excellent experience for all Postgraduate Research Students, Research Supervisors and other users

## Visibility

- Provide Faculties, Schools, Supervisory Staff and other University Stakeholders with greater visibility of Research Students' progress in their Research Student Lifecycle

## Consistency

- Provide standardised, streamlined, effective and consistent processes.
- The consistent capture of data for each Research Student will also assist in the management of the appeals process



# PROJECT SCOPE

- Review and standardisation of relevant business processes
- Provide a single source of data for the following elements of the Research Student Record;
  - Calculated Thesis Submission Date
  - Thesis Submission & Examination Management
  - Progress Tracking in Campus Solutions – (Including Initial Review, Differentiation and Annual Progress Monitoring)
- Research Student Supervision – A facility to record Supervisor/Student Meetings
- Reports – Improved Data Quality providing a firm basis for Business Intelligence

# RESEARCH STUDENT LIFECYCLE

EMA ALLIANCE 16-17 OCTOBER 2017

# RESEARCH STUDENT LIFECYCLE

## Expected Progress for a PhD Student



# MILESTONES

- Background
- Challenges
- Configuration Page
- Milestone Table/Process
- Milestone Recalculation Page

# MILESTONES - BACKGROUND

- Delivered Functionality
- Was first implemented in 2010
- Milestones could be assigned in bulk or individually
- Had to manually calculate and add the date to each individual student
- Had to manually recalculate if the student took a Leave of Absence
- Had to manually update when the student completed each individual milestone/s



# MILESTONES - CHALLENGES

- A solution that would automatically calculate and assign a Research Student's Milestones and dates
- A solution that would automatically recalculate a Research Student's Milestones if they took a Leave of Absence (or multiple Leaves of Absence)

# MILESTONE – CONFIGURATION PAGE

Qsis Student Information System

Favorites Main Menu > Records and Enrollment > Graduate Research Management > QUB Research Student Lifecycle > Milestone Configuration

Milestone Configuration

Academic Institution QUB Milestone RSL\_IR

	Academic Organization	Date Calculated	Full Time Days	Part Time Days
1		Start of Research	122	244

Personalize | Find | View All | First 1 of 1 Last

Save Return to Search Previous in List Next in List Notify

- Set up a new set of milestones, all beginning with RSL\_
- Developed a configuration page with a tab for each Milestone
- A Dropdown for date calculated with a number of values:
  - Start of Research
  - Admit Term
  - Admit Term + 1

# MILESTONE TABLE

Qsis

Home | W

Favorites | Main Menu > Set Up SACR > Product Related > Student Records > Enrollment > Milestone Table

### Milestone Table

Academic Institution: Queen's University Belfast

Milestone: RSL\_IR

Find | View All 1 of 1

\*Effective Date: 01/01/1901 \*Status: Active

\*Description: RSL Initial Review

\*Formal Description: RSL Initial Review

\*Calculate Required Date: QUB RSL Required Date

\*Calculate Anticipated Date: QUB RSL Anticipated Date

\*Transcript Level: Print on Unofficial

\*Print Milestone Detail: Always Print

Attempts Allowed: 0

Grading Scheme: PGR Postgraduate Research

Grading Basis: PIR PGR Initial Review

Visible in Self-service

Re-calculate Date Required?

#### Self-Service Availability

☐ Allow Student Self-Service ☐ Allow Advisor Self-Service

☐ Allow Student Attachment ☐ Allow Advisor Attachment

Information For Students:

Enter Milestone Levels Here

*Milestone Level	*Description	*Formal Description

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History Correct History

- Created two new translate values
- Modified the Milestone Process Application Engine to automatically calculate and bulk assign the date of a students milestones

# MILESTONE PROCESS

**Qsis**  
 Favorites Main Menu > Records and Enrollment > Enroll Students > Process Milestones

## Process Milestones

Run Control ID: BA [Report Manager](#) [Process Monitor](#) [Run](#)

\*Academic Institution: QUB Queen's University Belfast  
 \*Academic Career: PGR Postgraduate Research  
 Academic Program: BIOR Biological Sciences - Research  
 Academic Plan: BIO-PHD PhD Biological Sciences  
 \*Effective Date: 20/09/2017  
 \*Process Action: Insert Milestones [Milestone Copy](#)  
 \*Duplicate Milestone Options: Milestone ☒ Process Duplicate Milestones

**Population Selection**  
☐ Population Selection

**Student Select List**  
☒ Use Student Select [Clear](#)

*Empl ID	Name
1 40221910	Davidson, Annabelle

**Milestone Detail** Find | View All First 1 of 5 Last

\*Milestone: RSL\_IR \*Milestone Nbr: 40  
 Milestone Level:  
 Academic Plan: BIO-PHD PhD Biological Sciences  
 Description: QUB RSL Initial Review  
 Formal Description: QUB RSL Initial Review  
 Milestone Title:  
 Comment:  
☐ Hide Comment on Stdnt Self-Svc

\*Calculate Required Date: QUB RSL Required Date  
 \*Calculate Anticipated Date: QUB RSL Anticipated Date  
 \*Transcript Level: Unofficial \*Print Milestone Detail: Always  
☐ Advised by Committee

- Create a template for the Career/Program/Plan
- Assign the relevant milestones to the template
- Milestone process can be run by using either the Population Selection Option

Or

- Student Select List – Individual students

# STUDENT MILESTONE PAGE

**Qsis** Student Information System

Favorites | Main Menu > Records and Enrollment > Enroll Students > Student Milestones

## Student Milestones

Annabelle Davidson 40221910

Academic Institution: Queen's University Belfast Academic Career: Postgraduate Research  
Academic Program: Biological Sciences - Research Program Not Active

Find | View All First 1 of 1 Last

\*Effective Date: 20/09/2017 Milestone Copy + -

### Milestone Detail

Find | View All First 1 of 5 Last

\*Milestone: RSL\_IR \*Milestone Nbr: 10 + -

Milestone Level: + -

Milestone Complete: Not Completed

Academic Plan: BIO-PHD PhD Biological Sciences Plan Not Active

Description: QUB RSL Initial Review

Formal Description: QUB RSL Initial Review

Milestone Title: + -

Comment: + -

☐ Hide Comment on Stdnt Self-Svc

[Manage Milestone Documents](#)

Term Required: 2171 AY 2017/18 Date Required: 31/08/2018 + -

Anticipated Term: 2171 AY 2017/18 Anticipated Date: 31/01/2018 + -

\*Transcript Level: Unofficial \*Print Milestone Detail: Always + -

☐ Advised by Committee

### Advisors

Personalize | First 1 of 1 Last

*Advisor/Evaluator	Name
1	

- Milestone Process Runs
- Uses the information in the configuration page and populates the following fields:
  - Date Required
  - Term Required
  - Anticipated Date
  - Anticipated Term




# DASHBOARDS

- Supervisor
- School/Head of School Approver

# SUPERVISOR DASHBOARD

- Provides a supervisor with a holistic view of the students that they are assigned too in the Advisor Table
- Ability to access a student's Initial Review, Differentiation, Annual Progress Review & Formal Meeting pages by selecting the relevant icon
- Variety of icons to identify when a milestone is Not Yet Due, Due Soon, Due, Overdue and Complete


Home | Add to Favorites | Sign out

[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [QUB RSL Supervisor Dashboard](#)

## QUB RSL Supervisor Dashboard

[Personalize](#) | [Content](#) | [Layout](#)

### RSL Leave of Absence

Student	Name	Role	Date of Leave	Proposed Return
40221846	Philips, Grace	RSL Panel	01/08/2017	01/12/2017

### RSL Links for Supervisors

- [PSTP Training](#)  
QUB Postgraduate Training
- [Thesis Management](#)  
Maintain Thesis Management related data
- [Submit a New Nomination](#)  
Submit the Nomination of Examiners form for a research student
- [Candidate Management](#)  
Administer graduate research candidates.

### RSL Supervisor View of Student


Student	Name	Role	Start	IR	Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	PSTP Training
40221906	Arthurs, Bebhinn	Principal Supervisor	01/10/2017	✓	■	-	■	■	■	-	-	-	-	2	<a href="#">View</a>
40221902	Chambers, Jessica	RSL Panel Member	01/09/2017	✓	✓	✓	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221910	Davidson, Annabelle	Secondary Supervisor	01/10/2017	■	■	-	■	■	■	-	-	-	-	0	<a href="#">View</a>
40221832	Gorman, Jessica	Secondary Supervisor	15/07/2017	■	■	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221898	Johnson, Chloe	Co-Supervisor	01/10/2017	■	■	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221837	Logue, Anna	Principal Supervisor	01/10/2016	✓	■	■	■	■	■	■	-	-	-	0	<a href="#">View</a>
40221907	Lynch, Emma	Secondary Supervisor	01/10/2017	✓	▲	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221847	Morgan, Daniel	External Supervisor	01/09/2016	✓	✓	✓	■	■	■	-	-	-	-	0	<a href="#">View</a>
40221908	Smith, Rebecca	Secondary Supervisor	01/10/2017	✓	✓	-	■	■	■	-	-	-	-	2	<a href="#">View</a>

[Show All Results](#)

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

# SUPERVISOR DASHBOARD CONT

- A summary of the number of Formal Meetings a student has had in the current term
- A link to an individual student's Training Record (PSTP Training)
- A summary of those students currently on a Leave of Absence
- Links to other pages in Qsis including Submit a New Nomination - External Examiners


Student Information System

[Home](#) | [Add to Favorites](#) | [Sign out](#)

[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [QUB RSL Supervisor Dashboard](#)





## QUB RSL Supervisor Dashboard

[Personalize](#) | [Content](#) | [Layout](#)

### RSL Leave of Absence

Student	Name	Role	Date of Leave	Proposed Return
40221846	Philips, Grace	RSL Panel	01/08/2017	01/12/2017

### RSL Links for Supervisors

- 
[PSTP Training](#)  
 QUB Postgraduate Training
- 
[Thesis Management](#)  
 Maintain Thesis Management related data
- 
[Submit a New Nomination](#)  
 Submit the Nomination of Examiners form for a research student
- 
[Candidate Management](#)  
 Administer graduate research candidates.

### RSL Supervisor View of Student

Student	Name	Role	Start	IR Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	PSTP Training
40221906	Arthurs, Bebhinn	Principal Supervisor	01/10/2017	✓									2	<a href="#">View</a>
40221902	Chambers, Jessica	RSL Panel Member	01/09/2017	✓✓	✓								1	<a href="#">View</a>
40221910	Davidson, Annabelle	Secondary Supervisor	01/10/2017										0	<a href="#">View</a>
40221832	Gorman, Jessica	Secondary Supervisor	15/07/2017										1	<a href="#">View</a>
40221898	Johnson, Chloe	Co-Supervisor	01/10/2017										1	<a href="#">View</a>
40221837	Logue, Anna	Principal Supervisor	01/10/2016	✓									0	<a href="#">View</a>
40221907	Lynch, Emma	Secondary Supervisor	01/10/2017	✓	▲								1	<a href="#">View</a>
40221847	Morgan, Daniel	External Supervisor	01/09/2016	✓✓	✓								0	<a href="#">View</a>
40221908	Smith, Rebecca	Secondary Supervisor	01/10/2017	✓✓									2	<a href="#">View</a>

[Show All Results](#)

Complete: ✓
Not Due Yet: □
Due Soon: ▲
Overdue: 📅
Not Required: -

# HOW DOES THE SUPERVISOR DASHBOARD GET UPDATED

- The business processes associated with the milestones are now digitised and facilitated within Campus Solutions
- When the supervisor completes the relevant milestone i.e. Initial Review in the system the icon on the dashboard will automatically convert to a green tick

The screenshot displays the QUB RSL Supervisor Dashboard. On the left, there are sections for 'RSL Leave of Absence' and 'RSL Links for Supervisors' which includes links for PSTP Training, Thesis Management, Submit a New Nomination, and Candidate Management. The main area is titled 'RSL Supervisor View of Student' and contains a table of student records. The table has columns for Student ID, Name, Role, Start date, IR Diff, and a series of APR columns (1-8), followed by Formal Meetings and PSTP Training. A red oval highlights the row for student 40221910 Davidson, Annabelle, where the IR Diff column shows a green tick and the APR columns show blue squares. At the bottom, there is a legend for the status icons: Complete (green tick), Not Due Yet (blue square), Due Soon (yellow triangle), Overdue (red square), and Not Required (dash).

Student	Name	Role	Start	IR Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	PSTP Training
40221906	Arthurs,Bebhinn	Principal Supervisor	01/10/2017	✓	■	-	■	■	■	-	-	-	2	<a href="#">View</a>
40221902	Chambers,Jessica	RSL Panel Member	01/09/2017	✓	✓	✓	■	■	■	-	-	-	1	<a href="#">View</a>
40221910	Davidson,Annabelle	Secondary Supervisor	01/10/2017	■	■	-	■	■	■	-	-	-	0	<a href="#">View</a>
40221832	Gorman,Jessica	Secondary Supervisor	15/07/2017	■	■	-	■	■	■	-	-	-	1	<a href="#">View</a>
40221898	Johnson,Chloe	Co-Supervisor	01/10/2017	■	■	-	■	■	■	-	-	-	1	<a href="#">View</a>
40221837	Logue,Anna	Principal Supervisor	01/10/2016	✓	■	■	■	■	■	-	-	-	0	<a href="#">View</a>
40221907	Lynch,Emma	Secondary Supervisor	01/10/2017	✓	▲	-	■	■	■	-	-	-	1	<a href="#">View</a>
40221847	Morgan,Daniel	External Supervisor	01/09/2016	✓	✓	✓	■	■	■	-	-	-	0	<a href="#">View</a>
40221908	Smith,Rebecca	Secondary Supervisor	01/10/2017	✓	✓	-	■	■	■	-	-	-	2	<a href="#">View</a>

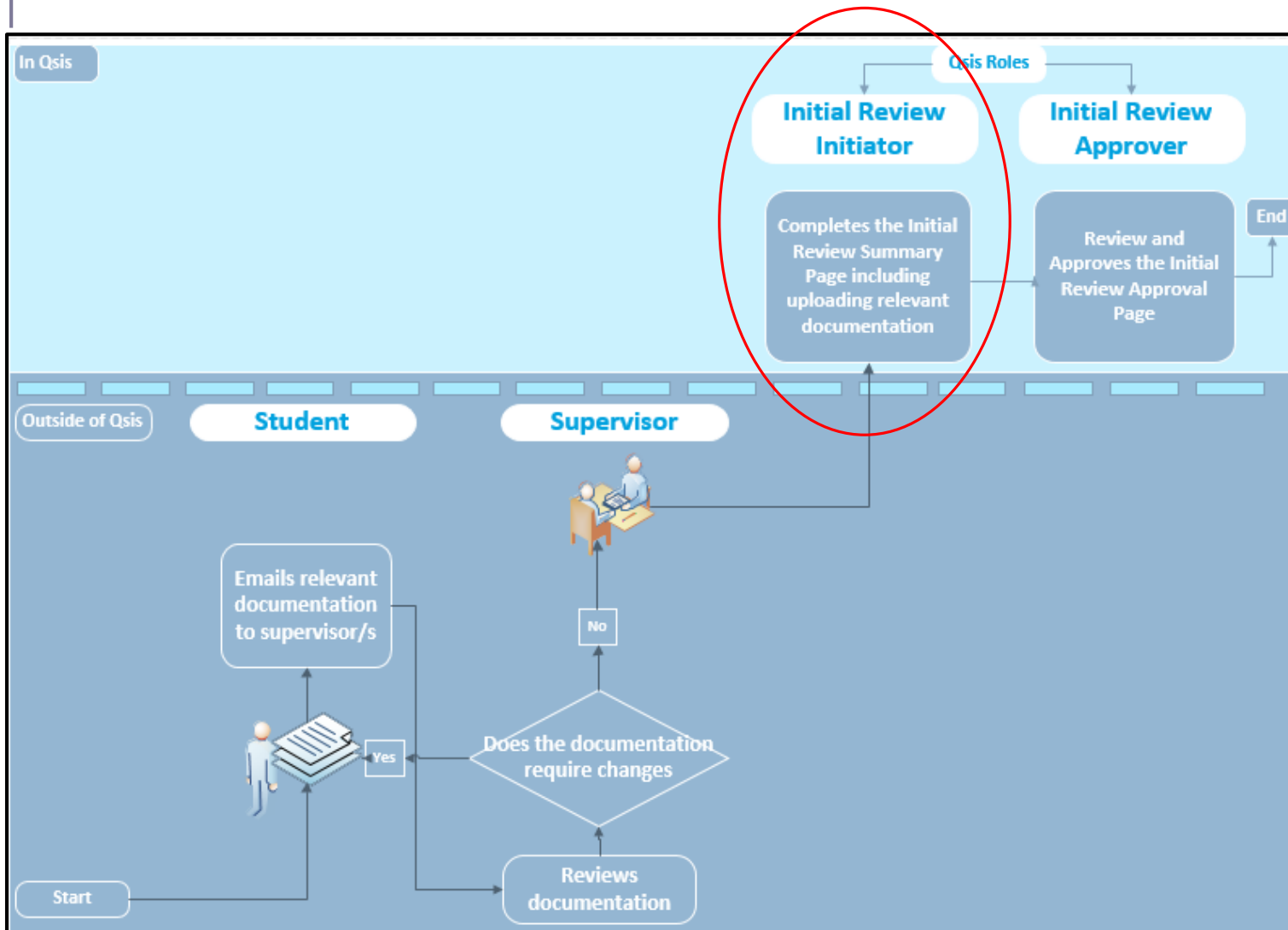
Complete: ✓ Not Due Yet: ■ Due Soon: ▲ Overdue: ■ Not Required: -

# INITIAL REVIEW

- Four months after a Full Time PhD student's start date
- Eight Months after a Part Time PhD student's start date



# INITIAL REVIEW



# INITIAL REVIEW EVALUATION

**Qsis**  
Student Information System

Favorites | Main Menu > Records and Enrollment > Graduate Research Management > QUB Research Student Lifecycle > Initial Review

Initial Review Evaluation | Initial Review Approval

**Student Details**  
Student Number 40221910  
First Name Annabelle  
Surname Davidson  
Status Active in Program  
Plan PhD Biological Sciences  
Mode of Study Full-Time  
Project Title Tourism and the Nitrogen Cycle.  
Start Date 01/10/2017 Latest Submission Date 30/09/2021 Days Consumed 10.00  
Admit Term 2171 Expected Graduation Term Max Days Left 1450.00

**Thesis Management**  
**Supervisors**

	Supervisory Role	Name
1	Principal Supervisor	Miss Helen Carmichael
2	Secondary Supervisor	Ms Paula Leadon
3	Tertiary Supervisor	Mr Andrew Morrell

**Evaluation**  
Initial Review Status Initiated \*Initial Review Date 11/10/2017  
**Attendees**

	Role Name	Title	First Name	Last Name		
1	Chair	Dr	Andrew	Morrell	+	-
2	Attendee	Dr	Paula	Leadon	+	-

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

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

Does the Project Title need changed? No

If yes, please confirm the new Project Title

Are the appropriate resources in place? Yes

If no, please provide an explanation

Recommendations to be considered by the supervisor's team in preparation for differentiation

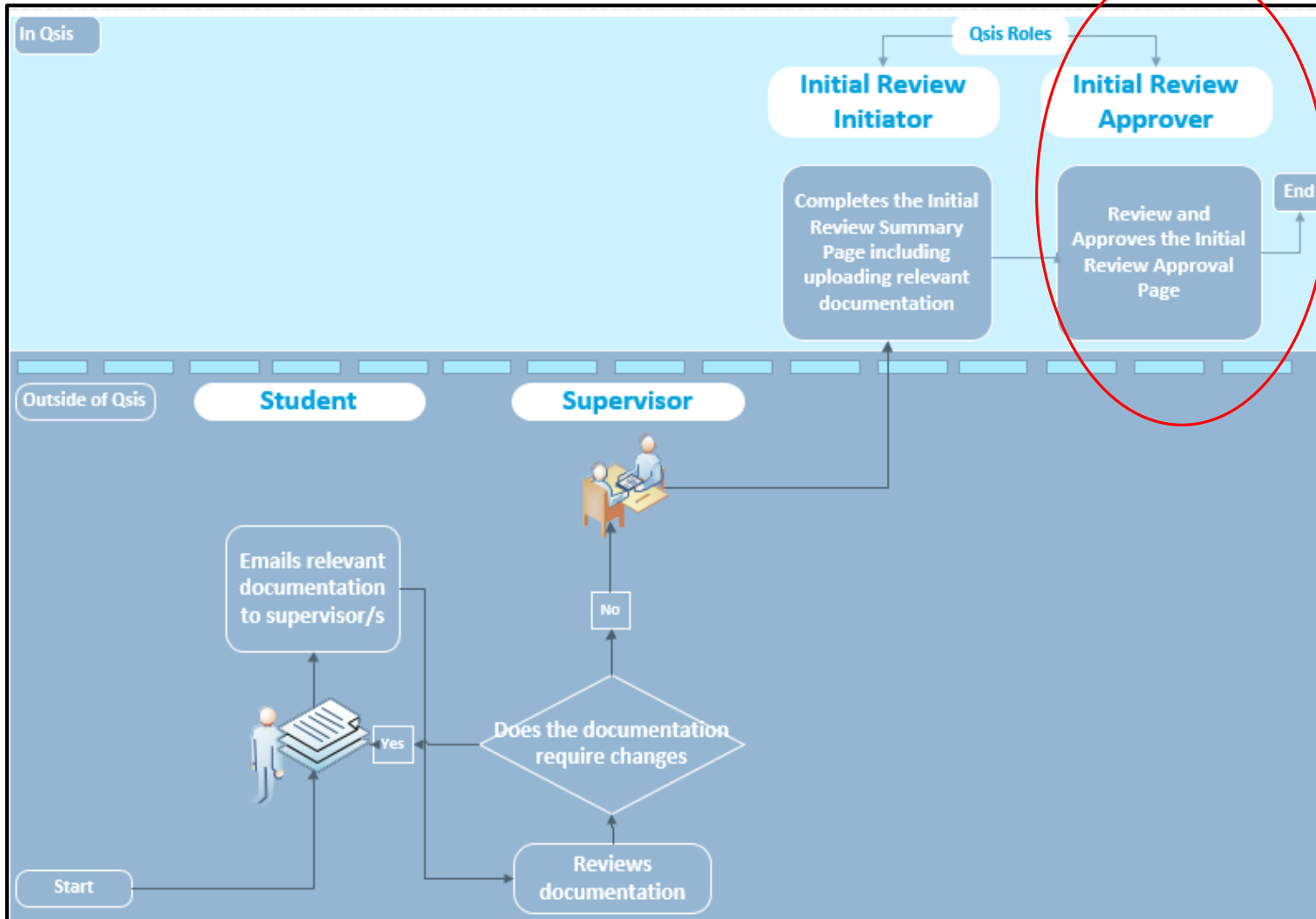
**Additional Information**  
Additional Information

**Document Upload**


Personalize | Find | View All | First 1 of 1 Last

Attached File	Delete Attachment	View Attachment
1 DOCX.docx	Delete Attachment	View Attachment

# INITIAL REVIEW



# SCHOOL ADMINISTRATOR/APPROVAL DASHBOARD


Qsis Student Information System

[Home](#) | [Add to Favorites](#) | [Sign out](#)

[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [QUB RSL School Dashboard](#)

QUB RSL School Dashboard

RSL Initial Review Action

ID	Name	Acad Plan	Initial Review Date
<a href="#">40221910</a>	Davidson, Annabelle	BIO-PHD	11/10/2017

RSL Differentiation Action

ID	Name	Acad Plan	Date of Differentiation	Attempt
<a href="#">40221843</a>	Brown, Laura	BIO-PHD	10/10/2017	1
<a href="#">40221842</a>	Carmichael, James	BIO-PHD	10/10/2017	1

RSL APR Action

ID	Name	Acad Plan	Date of APR	Attempt
<a href="#">40221843</a>	Brown, Laura	BIO-PHD	10/10/2017	1
<a href="#">40221842</a>	Carmichael, James	BIO-PHD	10/10/2017	1

RSL School Leave of Absence

ID	Name	Acad Plan	Date of Leave	Proposed Return
40221850	Black, Joanne	BIO-MPHIL	01/11/2016	
40221840	Johnson, Gordon	BIO-PHD	01/11/2016	01/11/2017
40221846	Philips, Grace	BIO-PHD	01/08/2017	01/12/2017

RSL School Referred

ID	Name	Milestone	Referred Date
40221897	Adams, Rebecca	RSL Annual Progress Review YR1	20/09/2017
40221897	Adams, Rebecca	RSL Differentiation	01/08/2017
40221906	Arthurs, Bebhinn	RSL Differentiation	02/10/2017

RSL Overview - Current Term

School	Milestone					Total
Biological Sciences	RSL Initial Review	1	0	5	7	13
Biological Sciences	RSL Differentiation	0	1	10	4	15
Biological Sciences	RSL Annual Progress Review YR1	0	0	8	3	11
Biological Sciences	RSL Annual Progress Review YR2	1	1	6	2	10
Biological Sciences	RSL Annual Progress Review YR3	0	0	1	0	1
Biological Sciences	RSL Annual Progress Review YR4	0	0	1	0	1

[Show All Results](#)

Complete:

Not Due Yet:

Due Soon:

Overdue:

Not Required: -

RSL View of Active Students

Student	Name	Plan	Start	IR	Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	PSTP Training
40221897	Adams, Rebecca	BIO-PHD	01/09/2017								-	-	-	2	<a href="#">View</a>
40221906	Arthurs, Bebhinn	BIO-PHD	01/10/2017			-				-	-	-	-	2	<a href="#">View</a>
40221895	Arthurs, Emma	BIO-PHD	01/09/2017								-	-	-	0	<a href="#">View</a>
40221850	Black, Joanne	BIO-MPHIL	01/09/2016								-	-	-	1	<a href="#">View</a>
40221843	Brown, Laura	BIO-PHD	01/09/2016								-	-	-	1	<a href="#">View</a>
40221842	Carmichael, James	BIO-PHD	01/10/2016								-	-	-	0	<a href="#">View</a>
40221902	Chambers, Jessica	BIO-PHD	01/09/2017							-	-	-	-	1	<a href="#">View</a>
40221901	Collins, Tom	BIO-PHD	01/09/2017								-	-	-	0	<a href="#">View</a>
40221910	Davidson, Annabelle	BIO-PHD	01/10/2017			-				-	-	-	-	0	<a href="#">View</a>
40221838	Fitzsimons, Oisín	BIO-PHD	01/09/2016				-	-	-	-	-	-	-	0	<a href="#">View</a>

# INITIAL REVIEW APPROVAL

**Qsis**  
Student Information System

Favorites | Main Menu > Records and Enrollment > Graduate Research Management > QUB Research Student Lifecycle > Initial Review

Initial Review Evaluation | **Initial Review Approval**

**Student Details**

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Plan PhD Biological Sciences  
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Start Date 01/10/2017 Latest Submission Date 30/09/2021 Days Consumed 10.00  
Admit Term 2171 Expected Graduation Term Max Days Left 1450.00

Thesis Management  
Supervisors

**Confirmation**

Initial Review Status Completed

Please confirm that you agree with the record/recommendation on the Initial Review Evaluation Page. Yes

'If no, please specify below':


**Audit**

	Username	Last Update Date/Time	Initial Review Status	Comments
1	Leadon, Paula	11/10/17 3:41:20PM	Initiated	
2	Leadon, Paula	11/10/17 3:50:23PM	Submitted	
3	Leadon, Paula	11/10/17 3:56:35PM	Completed	

- When the Initial Review page is approved the status of the respective milestone in the student milestone table will get updated
- The Supervisor, Student and School Dashboards will update immediately
- The milestone icon for the milestone will update to a green tick – symbolising that the milestone is complete



# UPDATED SUPERVISOR DASHBOARD


QUB Research Student Lifecycle > QUB RSL Supervisor Dashboard
Home | Add to Favorites | Sign out

[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [QUB RSL Supervisor Dashboard](#)

## QUB RSL Supervisor Dashboard

Personalize [Content](#) | [Layout](#)

### RSL Leave of Absence

Student	Name	Role	Date of Leave	Proposed Return
40221846	Philips, Grace	RSL Panel	01/08/2017	01/12/2017

### RSL Links for Supervisors

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QUB Postgraduate Training
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40221902	Chambers, Jessica	RSL Panel Member	01/09/2017	✓	✓	✓	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221910	Davidson, Annabelle	Secondary Supervisor	01/10/2017	✓	■	-	■	■	■	-	-	-	-	0	<a href="#">View</a>
40221832	Gorman, Jessica	Secondary Supervisor	15/07/2017	■	■	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221898	Johnson, Chloe	Co-Supervisor	01/10/2017	■	■	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221837	Logue, Anna	Principal Supervisor	01/10/2016	✓	■	■	■	■	■	■	-	-	-	0	<a href="#">View</a>
40221907	Lynch, Emma	Secondary Supervisor	01/10/2017	✓	▲	-	■	■	■	-	-	-	-	1	<a href="#">View</a>
40221847	Morgan, Daniel	External Supervisor	01/09/2016	✓	✓	✓	■	■	■	-	-	-	-	0	<a href="#">View</a>
40221908	Smith, Rebecca	Secondary Supervisor	01/10/2017	✓	✓	-	■	■	■	-	-	-	-	2	<a href="#">View</a>

[Show All Results](#)

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

# SCHOOL ADMINISTRATOR/APPROVAL DASHBOARD

**Qsis** Student Information System

Home | Add to Favorites | Sign out

Favorites | Main Menu > Records and Enrollment > Graduate Research Management > QUB Research Student Lifecycle > QUB RSL School Dashboard

QUB RSL School Dashboard Personalize [Content](#) | [Layout](#)

**RSL Initial Review Action**

ID	Name	Acad Plan	Initial Review Date
40221843	Brown, Laura	BIO-PHD	10/10/2017
40221842	Carmichael, James	BIO-PHD	10/10/2017

**RSL Differentiation Action**

ID	Name	Acad Plan	Date of Differentiation	Attempt
40221843	Brown, Laura	BIO-PHD	10/10/2017	1
40221842	Carmichael, James	BIO-PHD	10/10/2017	1

**RSL APR Action**

ID	Name	Acad Plan	Date of APR	Attempt
40221843	Brown, Laura	BIO-PHD	10/10/2017	1
40221842	Carmichael, James	BIO-PHD	10/10/2017	1

**RSL School Leave of Absence**

ID	Name	Acad Plan	Date of Leave	Proposed Return
40221850	Black, Joanne	BIO-MPHIL	01/11/2016	
40221840	Johnson, Gordon	BIO-PHD	01/11/2016	01/11/2017
40221846	Philips, Grace	BIO-PHD	01/08/2017	01/12/2017

**RSL School Referred**

ID	Name	Milestone	Referred Date
40221897	Adams, Rebecca	RSL Annual Progress Review YR1	20/09/2017
40221897	Adams, Rebecca	RSL Differentiation	01/08/2017
40221906	Arthurs, Bebhinn	RSL Differentiation	02/10/2017
40221906	Arthurs, Bebhinn	RSL Annual Progress Review YR2	02/10/2017

**RSL Overview - Current Term**

School	Milestone	1	2	3	4	5	6	7	8	Total
Biological Sciences	RSL Initial Review	1	0	4	8	13				
Biological Sciences	RSL Differentiation	0	1	10	4	15				
Biological Sciences	RSL Annual Progress Review YR1	0	0	8	3	11				
Biological Sciences	RSL Annual Progress Review YR2	1	1	6	2	10				
Biological Sciences	RSL Annual Progress Review YR3	0	0	1	0	1				
Biological Sciences	RSL Annual Progress Review YR4	0	0	1	0	1				


Complete: Not Due Yet: Due Soon: Overdue: Not Required: -

[Show All Results](#)

**RSL View of Active Students**

Student	Name	Plan	Start	IR	Diff	APR 1	APR 2	APR 3	APR 4	APR 5	APR 6	APR 7	APR 8	Formal Meetings	PSTP Training
40221897	Adams, Rebecca	BIO-PHD	01/09/2017								-	-	-	2	<a href="#">View</a>
40221906	Arthurs, Bebhinn	BIO-PHD	01/10/2017			-				-	-	-	-	2	<a href="#">View</a>
40221895	Arthurs, Emma	BIO-PHD	01/09/2017								-	-	-	0	<a href="#">View</a>
40221850	Black, Joanne	BIO-MPHIL	01/09/2016								-	-	-	1	<a href="#">View</a>
40221843	Brown, Laura	BIO-PHD	01/09/2016								-	-	-	1	<a href="#">View</a>
40221842	Carmichael, James	BIO-PHD	01/10/2016								-	-	-	0	<a href="#">View</a>
40221902	Chambers, Jessica	BIO-PHD	01/09/2017							-	-	-	-	1	<a href="#">View</a>
40221901	Collins, Tom	BIO-PHD	01/09/2017								-	-	-	0	<a href="#">View</a>
40221910	Davidson, Annabelle	BIO-PHD	01/10/2017			-				-	-	-	-	0	<a href="#">View</a>
40221838	Fitzsimons, Oisín	BIO-PHD	01/09/2016				-	-	-	-	-	-	-	0	<a href="#">View</a>

# STUDENT OVERVIEW PAGE



[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [Student Overview Page](#) > [Student Overview Page](#)

Student Overview Page

My Research Progress

Milestone	Anticipated Date	Completed Date	Status
QUB RSL Initial Review	31/01/2018	11/10/2017	Completed
RSL Differentiation	30/06/2018		Not Completed
RSL Annual Progress Review YR2	30/06/2019		Not Completed
RSL Annual Progress Review YR3	29/06/2020		Not Completed
RSL Annual Progress Review YR4	30/06/2021		Not Completed


Record of Formal Meetings

Academic Year	Formal Meetings
---------------	-----------------

My Completed Absences

Start	Return	Length of Absence
-------	--------	-------------------

Navigation short cuts

 [PSTP Training](#)  
QUB Postgraduate Training

Student Overview Page

Student Details

Student Number

40221910

First Name

Annabelle

Surname

Davidson

Status

Active in Program

Plan

PhD Biological Sciences

Mode of Study

Full-Time

Project Title

Tourism and the Nitrogen Cycle.

Start Date

01/10/2017

Latest Submission Date

30/09/2021

Days Consumed

10.00

Admit Term

2171

Expected Graduation Term

Max Days Left

1450.00

Thesis Management

Supervisors

Save

Return to Search

Notify

EMEA ALLIANCE 16-17 OCTOBER 2017

# MILESTONE RECALCULATION PAGE

# MILESTONE RECALCULATION PAGE

**Qsis** Student Information System

[Favorites](#) | 
 [Main Menu](#) > 
 [Records and Enrollment](#) > 
 [Graduate Research Management](#) > 
 [QUB Research Student Lifecycle](#) > 
 Milestone Recalculation

**Milestone Update**

▼ **Student Details**

**Student Number** 40221910  
**First Name** Annabelle  
**Surname** Davidson  
**Status** Active in Program  
**Plan** PhD Biological Sciences  
**Mode of Study** Full-Time  
**Project Title**

**Start Date** 01/10/2017    **Latest Submission Date** 30/09/2021    **Days Consumed** 10.00  
**Admit Term** 2171    **Expected Graduation Term**    **Max Days Left** 1450.00

► **Thesis Management**

► **Supervisors**

Personalize   Find   1-5 of 5   Last				
Description	Milestone Status	Anticipated Date	Update/Override Value	
1 QUB RSL Initial Review	Not Completed	31/01/2018	<input type="text"/>	<input type="text"/>
2 RSL Differentiation	Not Completed	30/06/2018	<input type="text"/>	<input type="text"/>
3 RSL Annual Progress Review YR2	Not Completed	30/06/2019	<input type="text"/>	<input type="text"/>
4 RSL Annual Progress Review YR3	Not Completed	29/06/2020	<input type="text"/>	<input type="text"/>
5 RSL Annual Progress Review YR4	Not Completed	30/06/2021	<input type="text"/>	<input type="text"/>

Personalize   Find   View All   1 of 1   Last					
User	Last Update Date/Time	Milestone Description	Anticipated Date	Update/Override Value	Number of Days
1					

- Developed page
- Allows schools to manually update milestone dates for those milestones not yet completed

# MILESTONE RECALCULATION PAGE

**Qsis** Student Information System

[Favorites](#) | 
 [Main Menu](#) > 
 [Records and Enrollment](#) > 
 [Graduate Research Management](#) > 
 [QUB Research Student Lifecycle](#) > 
 Milestone Recalculation

**Milestone Update**

**Student Details**

Student Number: 40221910  
 First Name: Annabelle  
 Surname: Davidson  
 Status: Active in Program  
 Plan: PhD Biological Sciences  
 Mode of Study: Full-Time  
 Project Title: Tourism and the Nitrogen Cycle.

Start Date: 01/10/2017    Latest Submission Date: 30/09/2021    Days Consumed: 10.00  
 Admit Term: 2171    Expected Graduation Term:    Max Days Left: 1450.00

**Thesis Management**

**Supervisors**

Description	Milestone Status	Anticipated Date	Update/Override Value
1 QUB RSL Initial Review	Not Completed	31/01/2018	28/02/2018
2 RSL Differentiation	Not Completed	30/06/2018	
3 RSL Annual Progress Review YR2	Not Completed	30/06/2019	
4 RSL Annual Progress Review YR3	Not Completed	29/06/2020	
5 RSL Annual Progress Review YR4	Not Completed	30/06/2021	

Return from Leave Recalculation

Update Milestones

User	Last Update Date/Time	Milestone Description	Anticipated Date	Update/Override Value	Number of Days
1					

[Save](#)   [Return to Search](#)   [Notify](#)

- Insert new date
- Select Update Milestone
- The Anticipated Date will get updated both on the screen and on the student milestone page
- Update/Override value will appear blank

# MILESTONE RECALCULATION PAGE - RLOA

**Qsis** Student Information System

[Favorites](#) | [Main Menu](#) > [Records and Enrollment](#) > [Graduate Research Management](#) > [QUB Research Student Lifecycle](#) > [Milestone Recalculation](#)

**Milestone Update**

**Student Details**

**Student Number** 40221910  
**First Name** Annabelle  
**Surname** Davidson  
**Status** Active in Program  
**Plan** PhD Biological Sciences  
**Mode of Study** Full-Time  
**Project Title** Tourism and the Nitrogen Cycle.

**Start Date** 01/10/2017   **Latest Submission Date** 30/09/2021   **Days Consumed** 10.00  
**Admit Term** 2171   **Expected Graduation Term**   **Max Days Left** 1450.00

[Thesis Management](#)  
[Supervisors](#)

Description	Milestone Status	Anticipated Date	Update/Override Value
1 QUB RSL Initial Review	Not Completed	31/01/2018	<input type="text"/> 31
2 RSL Differentiation	Not Completed	30/06/2018	<input type="text"/> 31
3 RSL Annual Progress Review YR2	Not Completed	30/06/2019	<input type="text"/> 31
4 RSL Annual Progress Review YR3	Not Completed	29/06/2020	<input type="text"/> 31
5 RSL Annual Progress Review YR4	Not Completed	30/06/2021	<input type="text"/> 31

[Return from Leave Recalculation](#)   [Update Milestones](#)

User	Last Update Date/Time	Milestone Description	Anticipated Date	Update/Override Value	Number of Days
1					

[Save](#)   [Return to Search](#)   [Notify](#)

- Return from leave of absence (RLOA) button will be active when the latest row on the PPS is RLOA
- When selected the system will calculate the number of days a student is off and then add it onto the anticipated date
- If you want to accept the date, select the update milestones button

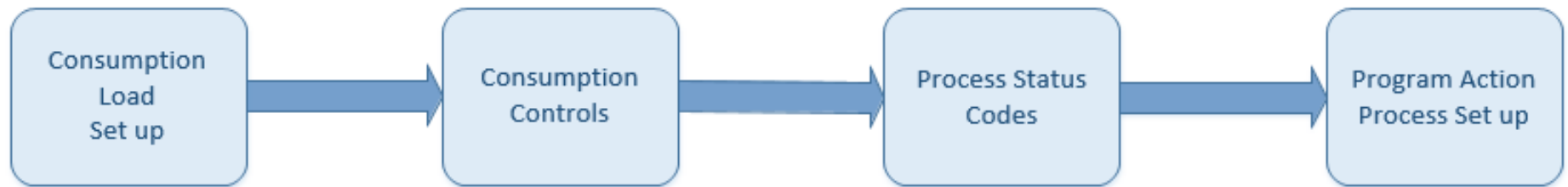
# CONSUMPTION



# CONSUMPTION – WHAT IS IT?

- Delivered functionality
- Automatically calculates a research student's maximum and minimum submission dates using the student's research start date and the number days that has been configured against that Program/Plan
- Ability to pause when a student takes a Leave of Absence
- Ability to resume and recalculate a student's submission dated when they Return from their Leave of Absence.

# CONSUMPTION - CONFIGURATION



# CONSUMPTION LOAD SET UP – FULL TIME



Favorites Main Menu > Set Up SACR > Product Related > Student Records > Research Management > Research Consumption Load

## Research Consumption Load Setup

Academic Institution: QUB Queen's University Belfast

Consumption Load: FT

Find   View All First 1 of 1 Last				
*Effective Date:	<input type="text" value="01/01/1901"/>	*Effective Status:	<input type="text" value="Active"/>	
*Description:	<input type="text" value="Full Time"/>			
*Short Description:	<input type="text" value="FT"/>			
*Consumption Rate:	<input type="text" value="1.00"/>			

Save Return to Search Notify Add Update/Display Include History Correct History

# CONSUMPTION LOAD SET UP – PART TIME



Favorites Main Menu > Set Up SACR > Product Related > Student Records > Research Management > Research Consumption Load

## Research Consumption Load Setup

Academic Institution: QUB Queen's University Belfast

Consumption Load: PT

Find   View All First 1 of 1 Last				
*Effective Date:	01/01/1901	*Effective Status:	Active	
*Description:	Part Time			
*Short Description:	PT			
*Consumption Rate:	0.50			

Save Return to Search Notify Add Update/Display Include History Correct History

# CONSUMPTION CONTROLS



Favorites | Main Menu > Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table

Program HESA Data | Program Offering/Year HESA | PBI Data | Graduation | **Research Processing Options** | Advisement

Academic Institution: QUB Queen's University Belfast

Academic Program: BIOR Biological Sciences - Research

Find | View All | First | 1 of 1 | Last

Effective Date: 12/05/2017 Status: Active

☒ Use Research Processing

## Consumption Controls

### Consumption Mode:

☐ None

☒ Days

### Candidacy Duration

Days: 1460

Consumption Load: FT Full Time

Consumption Rate: 1.00

Early Submission %: 50

## Thesis Examination Controls

Evaluation Category: THESIS

\*Submit Notice Offset (Days): 90

Evaluation Code: QUB

Exam Return Default (Days): 0

Minimum Examiners: 2

Maximum Internal Examiners: 0

☐ Intent to Submit Required

\*Maximum Number of Submissions: 99

☐ Exam Certificate Required

Transcript Level: ▼

Save Return to Search Notify Add Update/Display Include History Correct History

[Academic Program](#) | [Standing/Honors](#) | [Taxonomy/Campus](#) | [Repeat/Incomplete](#) | [Enrollment](#) | [Course](#) | [Dynamic Date](#) | [Program HESA Data](#) | [Program Offering/Year HESA](#) | [PBI Data](#) | [Graduation](#) | **[Research Processing Options](#)** | [Advisement](#)

# PROCESS STATUS CODES



Favorites Main Menu > Set Up SACR > Product Related > Student Records > Research Management > Process Status Codes

## Process Status Codes

Academic Institution: QUB Queen's University Belfast

Group Code: CON

Find | View All First 1 of 1 Last

Effective Date: 01/01/1901 Status: Active

Description: Consumption Status

System Usage: Consumption

*Status	*Description	*Short Description	Self Service Description	*Status Level
COMP	Completed	COMP	Completed	00
DISC	Disc- Exit with Taught Award	DISC	Disc- Exit with Taught Award	00
EXT OF TIME	Concession - Extension of Time	EXT TIME	Concession - Extension of Time	00
FULL TIME	Full Time	FULL TIME	Full Time	00
GRAD ONLY	Grad Only	GRAD ONLY	Grad Only	00
LOA	Leave of Absence	LOA	Leave of Absence	00
PART TIME	Part Time	PART TIME	Part Time	00
PGRC	Program Change	PGRC	Program Change	00
PLNC	Plan Change	PLNC	Plan Change	00
READMIT	Readmit	READMIT	Readmit	00
RESET	Reset	RESET	Reset	00
RLOA	Return from Leave of Absence	RLOA	Return from Leave of Absence	00
THESIS ONLY	Thesis Only	THESIS ONL	Thesis Only	00
WADM	Withdrawn	WADM	Withdrawn	00

# PROGRAM ACTION PROCESS SETUP



Favorites Main Menu > Set Up SACR > Product Related > Student Records > Program Action > Program Action Process Setup

## Program Action Process Setup

Academic Institution: QUB Queen's University Belfast

Process: Research Consumption

Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1901 \*Status: Active

	*Program Action	Action Reason	All Other Reasons	*Consumption Action	*Status	Description		
1	COMP		<input checked="" type="checkbox"/>	Suspend	COMP	Completed	+	-
2	DISC		<input checked="" type="checkbox"/>	Suspend	DISC	Disc- Exit with Taught Award	+	-
3	LEAV		<input checked="" type="checkbox"/>	Suspend	LOA	Leave of Absence	+	-
4	RADM		<input checked="" type="checkbox"/>	Resume	READMIT	Readmit	+	-
5	RLOA		<input checked="" type="checkbox"/>	Resume	RLOA	Return from Leave of Absence	+	-
6	WADM		<input checked="" type="checkbox"/>	Suspend	WADM	Withdrawn	+	-

Personalize | Find | First 1-6 of 6 Last

Save

Return to Search

Add

Update/Display

Include History

Correct History

Information Research Topic Supervisors Consumption and Submission Other Assignments

Annabelle Davidson

40221910



**Academic Institution:** Queen's University Belfast

**Candidate Number:** 000000019477

**Academic Career:** Postgraduate Research

**Student Career Nbr:** 0

**Academic Program:** Biological Sciences - Research

**Academic Plan:** PhD Biological Sciences

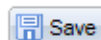
**Days Remaining:** 1450.00

[Attachments \(0\)](#)

Consumption				Find   View All   First   1 of 1   Last
<b>*Effective Date:</b>		01/10/2017	<b>*Eff Seq:</b> 1	
<b>Consumption Model:</b>		<input type="radio"/> None <input checked="" type="radio"/> Days	<b>*Effective Status:</b> Active	
<b>Ovrd Load:</b>	FT	Full Time	<b>Consumption Indicator:</b>	
<input checked="" type="checkbox"/> <b>Begin Date:</b>	01/10/2017	<b>Calculated Values</b> <div>1460.00</div> <div>1460.00</div> <div>Recalculate</div>	<b>Consumption Rate:</b> 1.00	
<input type="checkbox"/> <b>Total Days:</b>	1460.00		<b>Early Submission %:</b> 50	
<b>Days Remaining:</b> 1460.00				
<b>Days Consumed:</b> 0.00				
<input type="checkbox"/> <b>Early Submission Date:</b>	01/10/2019	01/10/2019		
<input type="checkbox"/> <b>Final Submission Date:</b>	30/09/2021	30/09/2021		
<b>Comments</b>				
<b>*Status:</b> A		Applied	<b>Status Date:</b> 11/10/2017	

Transfer To:

Go



Save



Return to Search



Notify



Update/Display



Include History



Correct History



Annabelle Davidson

40221910



Academic Career:

Postgraduate Research

Career Requirement Term

Student Career Nbr: 0

Find | View All First 1 of 2 Last

Status: Leave of Absence

\*Effective Date: 02/10/2017

\*Program Action: LEAV Leave of Absence

Action Reason:

\*Academic Institution: QUB Queen's University Belfast

\*Academic Program: BIOR Biological Sciences - Research

\*Admit Term: 2171 AY 2017/18

Requirement Term: 2171 AY 2017/18

Expected Grad Term:

Last Updated On: 11/10/2017 14:23:49

By: 2114763

Effective Sequence: 1

Action Date: 11/10/2017

Joint Prog Appr:

#### Admissions

☐ From Application

Application Nbr:

Application Program Nbr: 0

\*Campus: QUB QUB

\*Academic Load: Full-Time

[HESA Instance](#)

[CAS Details](#)

Information Research Topic Supervisors Consumption and Submission Other Assignments

Annabelle Davidson

40221910



Academic Institution: Queen's University Belfast

Candidate Number: 000000019477

Academic Career: Postgraduate Research

Student Career Nbr: 0

Academic Program: Biological Sciences - Research

Academic Plan: PhD Biological Sciences

Days Remaining: 1459.00

[Attachments \(0\)](#)

Consumption		Find   View All First 1 of 1 Last	
*Effective Date:	02/10/2017	*Eff Seq:	1
Consumption Model:	<input type="radio"/> None <input checked="" type="radio"/> Days	*Effective Status:	Active
Consumption Indicator:	Suspend	Consumption Rate:	1.00
Early Submission %:	50	Recalculate	
Overd Load:	FT Full Time	Calculated Values	
Begin Date:	01/10/2017	1460.00	
Total Days:	1460.00	1459.00	
Days Remaining:	1459.00		
Days Consumed:	1.00		
Early Submission Date:	01/10/2019	01/10/2019	
Final Submission Date:	30/09/2021	30/09/2021	
Comments			
*Status:	LOA	Status Date:	11/10/2017

Transfer To: 

Go

[Save](#) [Return to Search](#) [Notify](#)[Update/Display](#) [Include History](#) [Correct History](#)

Student Program

Student Plan

Student Sub-Plan

Student Attributes

Student Degrees

Stdnt Plan Wrk

HESA Student Instance 1



Annabelle Davidson

40221910



Academic Career:

Postgraduate Research

[Career Requirement Term](#)

Student Career Nbr: 0

Find | View All First 1 of 3 Last

Status: Active In Program



\*Effective Date: 11/10/2017



Effective Sequence:

1

\*Program Action: RLOA



Return from Leave of Absence

Action Date: 11/10/2017

Action Reason:



Joint Prog Appr:

☐

\*Academic Institution: QUB



Queen's University Belfast

\*Academic Program: BIOR



Biological Sciences - Research

\*Admit Term: 2171



AY 2017/18

Requirement Term: 2171



AY 2017/18

Expected Grad Term:



Last Updated On: 11/10/2017 14:28:51

By: 2114763

#### Admissions

☐ From Application

Application Nbr:

Application Program Nbr: 0

\*Campus: QUB



QUB

\*Academic Load:

Full-Time



[HESA Instance](#)

[CAS Details](#)

Save

Return to Search

Notify

Refresh

Add

Update/Display

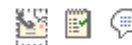
Include History

Correct History

Information Research Topic Supervisors Consumption and Submission Other Assignments

Annabelle Davidson

40221910



**Academic Institution:** Queen's University Belfast  
**Academic Career:** Postgraduate Research  
**Academic Program:** Biological Sciences - Research

**Candidate Number:** 000000019477  
**Student Career Nbr:** 0  
**Academic Plan:** PhD Biological Sciences  
**Days Remaining:** 1459.00

[Attachments \(0\)](#)

### Consumption

Find View All First 1 of 1 Last

**\*Effective Date:** 11/10/2017

**\*Eff Seq:** 1

**\*Effective Status:** Active

**Consumption Model:** ☐ None ☒ Days

**Consumption Indicator:** Resume

**Ovrd Load:** FT Full Time

**Consumption Rate:** 1.00

☒ **Begin Date:** 01/10/2017

#### Calculated Values

**Early Submission %:** 50

☐ **Total Days:** 1460.00

1460.00

**Days Remaining:** 1459.00

1459.00

**Days Consumed:** 1.00

Recalculate

☐ **Early Submission Date:** 10/10/2019

10/10/2019

☐ **Final Submission Date:** 09/10/2021

09/10/2021

### Comments

**\*Status:** RLOA Return from Leave of Absence

**Status Date:** 11/10/2017

**Transfer To:**

Go

Save Return to Search Notify

Update/Display Include History Correct History

# SUMMARY



replace photo with  
one of your own

# PRESENTERS

Paula Leadon

Functional Development Lead

Queen's University Belfast

[P.leadon@qub.ac.uk](mailto:P.leadon@qub.ac.uk)

**ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR  
DOWNLOAD FROM THE CONFERENCE SITE**





THANK YOU!



EMEA ALLIANCE 16-17 OCTOBER 2017