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THE RESEARCH PROGRESS REVIEW PROCESS

The Research Progress Review (APR) system is designed to simplify the administration of the review process by enabling postgraduate coordinators, school administrators, students, supervisors and panel members to complete the review process in an online environment.

The postgraduate coordinator or school administrator (herein referred to as ‘school admin’) has the ability to create online APRs for students within their school and track their progress to completion. In addition, documents can be uploaded and stored in the system and previous reviews (conducted online) will be accessible. The role of the school administrator is highlighted in Figure 1.

This guide is designed to outline the functionality of the online APR system for a school administrator. For information on policy and guidelines relating to the Research Progress Review please consult the documentation available on the Graduate Research School website.

![Basic APR Workflow Diagram](https://example.com/basis_prufowork.png)

Figure 1 - Basic APR Workflow

ACCESS TO THE REVIEW SYSTEM

The online APR system is administered by the Graduate Research School (GRS) in conjunction with schools. School Administrators who require access to the system should contact the GRS directly. Once a School Administrator has access to the system, they may grant access to other users within their school. For instructions on adding additional users, please refer to section ‘User Management’.

The APR system can be accessed directly via the following link: [https://apr.research.unsw.edu.au/](https://apr.research.unsw.edu.au/) Access is available both inside and outside the university network.
The system is optimised for use in Internet Explorer (Version 7 and above) in a Windows environment. The system is compatible with recent versions of Firefox, Safari and Chrome in a Windows and Mac environment, however some advanced features will not be available and the display of some elements may vary. However, this will not prevent users accessing and completing the form.

**TECHNICAL DIFFICULTIES**

If you are experiencing technical difficulties with the APR system please contact the IT Service Centre in the first instance. The issue will then be escalated to the appropriate business area for resolution.

<table>
<thead>
<tr>
<th>IT Service Centre</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tel</td>
<td>(02) 9385 1333</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:ITServiceCentre@unsw.edu.au">ITServiceCentre@unsw.edu.au</a></td>
</tr>
<tr>
<td>Web</td>
<td><a href="https://www.servicedesk.unsw.edu.au">https://www.servicedesk.unsw.edu.au</a></td>
</tr>
</tbody>
</table>

**STUDENT AND SUPERVISOR DATA**

Student and Supervisor data is retrieved on a nightly basis from the UNSW Student System (NSS). If any of the candidature or supervisor details are incorrect, these will need to be updated in NSS by the GRS to be reflected in the APR system the following day.

Students have the opportunity to review their enrolment details when they access their APR. If any of their enrolment details are flagged as incorrect, a notification is sent to the GRS who will amend their details in NSS. They may continue to complete and submit the form to their supervisor.

If a candidate’s address details are incorrect, these can be updated by the student directly in MyUNSW.
Where a student flags their supervisor as being incorrect, they will be able to complete and save the form but will not be allowed to submit it. A notification will be sent to the GRS, who will verify the supervisor details with the School and amend in NSS as required. Once updated, the GRS will notify the student who can then submit the form to the correct supervisor.

**USER ROLES**

Within the APR system, there are a number of roles a user may perform - for example a student, supervisor or postgraduate coordinator. When a users logs in they will be directed to the appropriate home page for their role.
Where a user performs multiple roles, for example as a postgraduate coordinator and a supervisor they can switch between these roles in the APR system by selecting the appropriate home page from the menu.

(1) Click ‘School Home’ to perform school admin role and ‘Supervisor Home’ to perform supervisor role.

THE REVIEW FORM

FORM SECTIONS

STATUS
The status section contains a history of the currently selected APR. At each stage of the review an additional status will be added along with comments entered by the user. For further information, please refer to ‘APR Status’.

**SECTION A: ENROLMENT (COMPLETED BY STUDENT)**

This section contains a summary of the student’s enrolment record. This data is retrieved from NSS on a nightly basis. For further information please refer to ‘Student and Supervisor Data’.
SECTION B: RESEARCH (COMPLETED BY STUDENT)

This section is used by the student to detail how their research has progressed against their research plan over the review period. A candidate can identify any issues which have impeded progress towards completion and formulate goals for the next 12 months.

SECTION C: CANDIDATURE (COMPLETED BY STUDENT)
This section lists time devoted by the student to their project, supervisory arrangements and access to resources.

SECTION D: SUPERVISOR (COMPLETED BY SUPERVISOR)

<table>
<thead>
<tr>
<th>Status</th>
<th>A. Enrolment</th>
<th>B. Research</th>
<th>C. Candidate</th>
<th>D. Supervisor</th>
<th>Attachments</th>
<th>Submit Form</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SECTION D:**

**(1)**. Has the candidate diligently and consistently applied him/herself to his/her project?

- **Strongly Agree**
- **Agree**
- **Neither**
- **Disagree**
- **Strongly Disagree**

**SECTION D:**

**(6)**. Has the candidate shown initiative with the requirements of the research program and the level of study?

- **Strongly Agree**
- **Agree**
- **Neither**
- **Disagree**
- **Strongly Disagree**

**SECTION D:**

**(8)**. Has the candidate made satisfactory progress over the past year or since last review?

- **Strongly Agree**
- **Agree**
- **Neither**
- **Disagree**
- **Strongly Disagree**

**SECTION D:**

**(10)**. Have any of the following problems affected progress?

- **Academic background**
- **English language/comprehension and/or writing**
- **Settling in**
- **Access to resources**
- **Experimentation**
- **Understanding work expected**
- **Communication**
- **Health/Personal**
- **Financial**
- **Interruption to supervision**
- **Other**

**SECTION D:**

(9). Please elaborate on specific issues identified and indicate what steps have been taken to address these issues.
In this section a supervisor can identify any issues that have affected the student’s progress and what steps have been taken to address them. In addition, they may provide an appraisal of the current supervisory arrangements.

PANEL SELECTION (COMPLETED BY SCHOOL ADMINISTRATOR / PANEL CHAIR)

This section is to allow the school administrator or panel chair to document the composition of the review panel for an individual APR. In addition, when a staff member is added to the panel, they will be granted permission to view the APR online. Please refer to ‘Panel Selection’ for further information.

SECTION E: PANEL REVIEW (COMPLETED BY SCHOOL ADMINISTRATOR / PANEL CHAIR)

This section is used to record the details of the candidate’s panel review. For further information please refer to the ‘Panel Review’ section.

ATTACHMENTS (CAN BE COMPLETED BY ANY USER)
To assist the review process, students, supervisors, panel chairs or school administrators may upload attachments. To do this, select the ‘Add Attachment’ link and browse to the file on your computer.

For students, attachments of up to 50MB in size are permissible. All other users may upload files of up to 5MB. If the file size exceeds this limit, a link to an external file sharing site may be placed in a text file and uploaded instead.

Attachments may be added and deleted by the user that created them up until when the form is submitted. Once the form has been submitted, the attachment becomes read-only but may continue to be viewed by clicking on the attachment and opting to ‘Open File’ or ‘Save File As..’ when prompted.

Most common file types (documents, PDFs, video/audio files etc) may be uploaded. There are restrictions on some file types to prevent malicious content being uploaded.

Some examples of content that users may wish to provide are outlined in Table 1.
### Table 1 - Examples of Attachments

<table>
<thead>
<tr>
<th>Attachment Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Thesis chapters, examples of work, literature</td>
</tr>
<tr>
<td>review, thesis writing plan</td>
</tr>
<tr>
<td><strong>Supervisor</strong></td>
</tr>
<tr>
<td>Reports or comments provided by joint or co-</td>
</tr>
<tr>
<td>supervisors</td>
</tr>
<tr>
<td><strong>School Admin / Panel Chair</strong></td>
</tr>
<tr>
<td>Scanned notes taken at panel review, Written</td>
</tr>
<tr>
<td>report provided by student at review</td>
</tr>
</tbody>
</table>

### SAVING THE FORM

A user can save their changes and return to complete the form at a later stage by clicking on the ‘Save’ button.

In addition, the form is automatically saved when a user moves between sections by clicking on the ‘Next’ and ‘Previous’ buttons.

### VIEWING THE FORM ON A SINGLE PAGE / PRINTING

The form may be viewed on a single page by following the ‘Printer Friendly Version’ link. This allows for easier printing or saving to a file format (e.g. PDF).
STUDENT DOES NOT WANT TO SUBMIT FORM TO THEIR SUPERVISOR

Where a candidate does not want to submit their APR form to their supervisor they may revert to using a paper-based form. This should be sent directly to the student’s postgraduate coordinator. The form may be downloaded from the GRS website.

FORM PROGRESSION

As the review process progresses, the status of the APR is updated. Once the form has been submitted by the user, the information entered in the form at that stage of the review becomes read-only.

If a student has submitted the form but has failed to provide sufficient information for their review to progress, the supervisor may return the form to them. This allows the student to edit their input and re-submit the form.
Similarly, the form may be returned to the preceding user in the workflow at any point until the panel outcome is published. Returning the form to a user will generate an additional line in the APR history and require the user to enter a reason for returning the form. This reason will then be displayed in the history and visible to all users.

The Annual Progress Review (APR) process is designed to be a positive and productive process for candidates and their supervisors. Use this opportunity, not only to review the progress research, plan your thesis and ensure that you make the most of your time at UNSW.

If you have a question, it may already be answered in our help section. Here you will find the full APR procedure, frequently asked questions and contact details to assist with your query.

Below is a history of the currently selected APR. As the form progresses, you will have an opportunity to review input from your supervisor and the review panel.

You may only edit the form at the stage of ‘Candidate Review’. Once the form has been submitted, you will be unable to make changes. The form will then be available for your supervising panel to review. The ‘Comments’ section below will provide the reason for this. Once this is completed the form:

<table>
<thead>
<tr>
<th>Status</th>
<th>Candidate Review</th>
<th>Action</th>
<th>Actioned by</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-Oct-2011</td>
<td>Referral to Supervisor</td>
<td>Form submitted by student</td>
<td></td>
<td>Reason for returning form here...</td>
</tr>
<tr>
<td>21-Oct-2011</td>
<td>Candidate Section Complete</td>
<td>Form submitted by student</td>
<td></td>
<td>Reason for returning form here...</td>
</tr>
<tr>
<td>21-Oct-2011</td>
<td>Referral to Supervisor by School</td>
<td>Form submitted by student</td>
<td></td>
<td>Reason for returning form here...</td>
</tr>
<tr>
<td>21-Oct-2011</td>
<td>Supervisor Section Complete</td>
<td>Form submitted by student</td>
<td></td>
<td>New APR created for reporting period: Semester 2 2011</td>
</tr>
</tbody>
</table>

**Figure 4 - Form Progression through the APR process**

**USING THE REVIEW SYSTEM**

**NAVIGATION**

When accessing the system you will be required to enter your zID and password. For details on accessing the system, please refer to the ‘Access’ section. Initially you will be taken to the ‘School Home Page’. From here you can navigate through the various functions by using the menu in the top left-hand corner of the page.
The menu items available to the school administrator are listed in Table 2. Each of these functions is explained in detail in the sections that follow.

**Table 2 - Functions of the School Administrator**

<table>
<thead>
<tr>
<th>School Administrator Menu Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Home</td>
</tr>
<tr>
<td>Initiate Reporting Cycle</td>
</tr>
<tr>
<td>Bulk Panel Selection</td>
</tr>
<tr>
<td>User Management</td>
</tr>
</tbody>
</table>

(1) Menu available to school administrators
The school home page lists all active students within each school that the user has permission to view.

Each of the columns headings (School Code, Student ID, First Name, Last Name etc) may be sorted or filtered by selecting an option from the drop-down menu. The menu is activated by clicking on the column heading.

By placing a filter on a column - e.g. Last Name ‘Smith’ - only students who have a last name of ‘Smith’ will be displayed. Remove the filter to display all students. Filters cannot be applied to more than one column simultaneously.
Columns may also be sorted by selecting ‘Sort Ascending’ or ‘Sort Descending’ from the drop-down menu. Sorting can only be applied to a single column at any one time.

Table 3 contains a listing of all the column headings on the School Home page.

Table 3 - School Home Column Headings

<table>
<thead>
<tr>
<th>Column Headings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td>Student’s zID</td>
</tr>
<tr>
<td>School Code</td>
<td>Student’s School</td>
</tr>
<tr>
<td>First Name</td>
<td>Student’s First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Student’s Last Name</td>
</tr>
<tr>
<td>Supervisor Name</td>
<td>Student’s Supervisor - This corresponds to the ‘Admin Supervisor’ in NSS (The supervisor identified as having administrative responsibility for the student).</td>
</tr>
<tr>
<td>Reporting Period</td>
<td>See Reporting Periods</td>
</tr>
<tr>
<td>Current APR Status</td>
<td>This is the current status of the student’s latest APR. See APR Status</td>
</tr>
<tr>
<td>APR Last Modified Date</td>
<td>Date APR was last modified</td>
</tr>
</tbody>
</table>

**CURRENT REVIEW STATUS**

The column labeled ‘Current Review Status’ contains the status of the student’s most recent review. Table 4 lists all the available statuses.
Table 4 - APR Statuses

<table>
<thead>
<tr>
<th>Review Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Review</td>
<td>School has allocated APR to student. Awaiting student to complete the candidate section.</td>
</tr>
<tr>
<td>Supervisor Review</td>
<td>The candidate section is complete. Awaiting completion of the supervisor section.</td>
</tr>
<tr>
<td>Awaiting Panel Decision</td>
<td>The supervisor section is complete. The student can now view the supervisor’s comments. Awaiting the panel recommendation to be recorded.</td>
</tr>
<tr>
<td>Awaiting publication of outcome</td>
<td>The panel recommendation has been recorded by the Panel Chair or School Admin. Awaiting publication by the School Admin.</td>
</tr>
<tr>
<td>Panel Decision Published</td>
<td>The panel recommendation has been published by the school admin. The outcome is now viewable by the student. Awaiting acknowledgement of the final version of the APR by the student.</td>
</tr>
<tr>
<td>Completed</td>
<td>Student has acknowledged that they have seen the completed APR. The candidate may add comments on the panel outcome at this stage. These will be sent to their postgraduate co-coordinator and the GRS. The APR process has been completed.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The APR record has been cancelled.</td>
</tr>
</tbody>
</table>

STUDENT REVIEW HISTORY

From the home page, the review history of an individual student may be retrieved by clicking on the ‘Student ID’ field. This will retrieve a list of all reviews (completed online) and their statuses for that student.

(1) Click Student ID to open their APR history

You may view any of these student’s reviews by following the ‘Open’ link.
EXPORTING DATA

Data can be exported from the APR system by following the ‘Export’ link. This will export the list contained in the current window to Microsoft Excel. From here it can be saved or printed.

USER MANAGEMENT

School administrators and available panel members are configured through the ‘User Management’ menu located on the ‘School Home’ menu.
SCHOOL ADMINISTRATORS

If you are the administrator of multiple schools select the school you wish to modify from the drop-down menu. To configure the list school administrators, select the ‘School Admin’ tab.

To add an additional school administrator for the selected school click on the ‘Add School Admins’ link.

From the ‘Add User’ dialog, a user can search a directory of all active UNSW staff. To begin, enter the name or staff ID of the person you wish to add and Click ‘Search’. The search results will be displayed listing the person’s name, title and department.

To add the user, select the checkbox beside their name and click the ‘Add’ button.

Repeat this process for each school administrator that you wish to add.
(1) Enter Name / Staff ID
(2) Click ‘Search’ button
(3) Select staff member from the list by selecting the corresponding checkbox
(4) Click ‘Add’ button

School Administrators can be removed from the list by selecting the ‘Remove’ link.

(1) Select ‘Remove’ link

PANEL MEMBERS

Please refer to the Section ‘Configuring the list of available Panel Members’ for further information.

INITIATE REPORTING CYCLE
At the beginning of each reporting period you will be required to initiate the reporting cycle. This involves determining which students are due a review and creating a blank APR form in the system for the student to complete.

A school administrator can only create APRs when a reporting period has been opened by the GRS. Please refer to the section ‘Reporting Periods’ for further information.

To begin, select ‘Initiate Reporting Cycle’ from the ‘School Home’ menu.

(1) Select ‘Initiate Reporting Cycle’ from menu
As a school administrator, you will be presented with all the all active students within your school. If you are an administrator for multiple schools you may move between schools by changing the value in the ‘School’ drop-down list.

(1) Change between schools by selecting from drop-down menu

APRs will need to be created on a school by school basis as only students from a single school may be viewed at any one time.

REPORTING PERIODS

A reporting period corresponds to the research academic calendar. The start and end date for each reporting period is displayed in the top left-hand corner of the page. Date ranges for reporting periods are outlined in Table 5.

APRs can only be created once the GRS has opened a reporting period. This ensures that the most complete set of student data is available at the commencement of the APR process. A status of ‘Open’ indicates that the school administrator may proceed to create new forms for the selected candidates. If the status is ‘Closed’ no new forms can be created for the current reporting period.

The status of a reporting period does not impact the ability of users to access and complete forms which have already been created. However, a new review form cannot be created for a student until the previous review outcome has been published by the School Admin.

(1) The current reporting period
(2) The status of the current reporting period (Open/Closed)
Table 5 - APR Reporting Periods

<table>
<thead>
<tr>
<th>Reporting Periods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semester 1</td>
</tr>
<tr>
<td>Semester 2</td>
</tr>
</tbody>
</table>

At the beginning of an APR period you will need to decide which students in your school are due for a review in the current reporting cycle. To assist you, all active students in your school will be displayed on this page within one of 3 tabs – ‘In Current Reporting Period’, ‘In Future Reporting Period’ and ‘Under Examination’.

Students are placed in a reporting period based on their ‘Suggested Review Date’. For continuing students this date is set by the School Administrator when publishing the outcome of the previous APR. New students will be placed in the current reporting period by default once they enrol.

Students whose review date falls outside the current reporting period will be placed on the ‘In Future Reporting Period Tab’.

Students who are currently under examination will be placed under the ‘Thesis Submitted’ tab.

Students who are not enrolled for the current semester will have ‘No Units’ in the ‘Full/Part Time’ column.

To find a particular student, filter the list using any of the column headings.

(1) Students due a review in the Current Reporting Period
(2) Students due a review in Future Reporting Periods
(3) Students who have submitted their thesis

MOVING STUDENTS BETWEEN REPORTING PERIODS

Students may be moved between reporting periods by changing the month in the ‘Suggested Review Date’ in the drop down list. The student’s APR will be moved to either the current or future reporting period tab depending on the month selected.
(1) For student who are due a review select a month in the current Reporting Period (in the example above between Oct 2011 and Mar 2012)

(2) To move students to a future Reporting Period, select a date outside the current period (in the example above beyond Apr 2012)

A STUDENT CANNOT BE FOUND

To be present in the APR system, a student will need to be term activated in NSS for the current semester. If a candidate has withdrawn or discontinued they will not appear in the system. In addition, students are assigned to schools based on their academic plan owner in NSS. In the APR system, the student will be listed under this school.

CREATING AN APR FOR ALL STUDENTS

Figure 6 - Current Stage in Workflow
Once you are satisfied all students who are due a Research Progress Review have been placed in the current reporting period proceed to create the student APR forms.

To create the APR forms for each student click on the button ‘Create Review for all’. The ‘Current review status’ for each student selected will be changed to ‘Candidate Review’. You will be unable to create a new APR for a student or move them to a different reporting period until their previous APR has been acknowledged by the student. An automated email will be sent to students advising them that their form is available for completion.

(1) Click button to create an APR for all students
(2) Select ‘OK’ when prompted to continue

It is important that the list of students be reviewed carefully before creating the APRs as this action cannot be undone.

Once the APRs have been created, a confirmation message with the number of APRs produced will be displayed. This should correspond to the number of students in the current reporting period.
If a student does not have an admin supervisor, an error message will be displayed. A supervisor will need to be added in NSS before an APR can be created for this student (Please contact the GRS for assistance in doing this).

Where the outcome of an APR requires a candidate to undertake another review which falls in the next reporting period, an APR can be created for this student by selecting the ‘Create APR Now for Future Period’ link. This creates a new APR for the student which is available for the candidate to complete immediately.
This link should only be used in cases where the current Reporting Period is closed.

(1) Select link to create a new APR form for a student in a future Reporting Period

**CANCELLING A REVIEW**

In cases where a student has withdrawn or graduated before undertaking their review, the APR record will need to be cancelled in order to close the record. To cancel an APR please contact the GRS.

**THE PANEL REVIEW**

**ARRANGING THE PANEL REVIEW**

The online APR system is used to:

- Configure a list of staff who may sit on a review panel
- Allocate staff to a review panel
- Allow panel members to view APR forms online
- Allocate a panel chair who may record the outcome of the review meeting in the online system
- Publish the review outcome

The scheduling of reviews continues to be undertaken outside of this system. As online access is restricted to active staff members and students, panel members external to UNSW will have to be provided with alternative means of viewing a candidate’s review form. Please consult ‘External Panel Members’ for further information.

The school administrator will need to provide (UNSW) panel members with a link to the student’s APR enabling them to view the form online. Refer to section ‘Providing Panel members with Link’ for further information.

**CONFIGURING THE LIST OF AVAILABLE PANEL MEMBERS**
A list of staff who may act as panel members is configured through the online APR system. By adding a staff member to the list they will be made available when selecting the panel for a student’s review.

A staff member who is added to the list of available panel members will not have permission to view student APRs (a panel member will only be able to view an APR once they have been added to the list of selected panel members for that APR).

To configure the list of available panel members select ‘User Management’ from the ‘School Home’ menu.
If you administer more than one school, select the school for which you need to add available panel members from the drop-down menu. Choose the ‘Panel Members’ tab to display a list of existing available panel members.

To add an available panel member follow the ‘Add Panel Members’ link.

To begin, enter the name or staff ID of the panel member you wish to add and Click ‘Search’. The search results will be displayed listing the person’s name, title and department.

To add the user, select the checkbox beside their name and click the ‘Add’ button.
Repeat this process for each panel member that you wish to add.

Available panel members can be removed from the list by selecting the ‘Remove’ link.

**EXTERNAL PANEL MEMBERS**

Panel Members who are not active UNSW staff will be unable to access the online APR system. In order to enable them to prepare for the review, they may be emailed a copy of the candidate’s form.
Refer to the section on saving a form for further information.

A free-form text field is available to record the names of external panel members on the individual’s APR form. The ‘Panel Selection’ tab is available to the school admin once the supervisor has submitted the form.

**School Home • Review History For **

Welcome to the new online Annual Progress Review (APR) system.
The Annual Progress Review (APR) process is designed to be a positive and productive process for candidates and their supervisors. Use this an opportunity, not only to review the progress of your student, but also one to show them that you made the most of your time at UNSW.

If you have any questions, it may already be answered in our help section here. You will find the full APR procedure, frequently asked questions and contact details to assist with your query.

1. On APR Form select tab ‘Panel Selection’
2. External panel members can be recorded in the text box provided

---

**PANEL SELECTION**

A review panel must consist of at least 2 UNSW panel members. When the panel members and panel chair are added to a student review they will be granted permission to access the form online. In addition, the panel chair will have access to the ‘Panel Review’ section of the form enabling them to record the outcome of the review. Therefore the panel chair has the ability to record the panel members and enter the panel’s recommendation while at the review meeting.

The composition of a review panel may be altered up until the panel outcome has been published. Once an APR has been published, panel members (including the chair) will no longer be able to access the form.

Please note that a student’s supervisor or co-supervisor cannot be added as a panel member for that candidate’s review.

There are two methods that can be used by the school administrator to allocate panel members to a review.

1. **Bulk Panel Selection**
   Once the APRs have been created for a reporting period, the school admin may proceed to allocate panel members to each review from a single page. Please refer to ‘Bulk Panel Selection’ for further information.

2. **Individual Panel Selection**
Once the supervisor has submitted their comments, the school admin or panel chair may allocate panel members from the individual APR form. Please refer to ‘Individual Panel Selection’ for further information.

**BULK PANEL SELECTION**

Bulk panel selection is available to a school admin once the APRs have been created for the reporting period. This gives the user the ability to assign the panel members for all student reviews from a single page. Panel membership can be changed up until the panel recommendation is published.

To begin select School Home > ‘Bulk Panel Selection’ from the main menu.

(1) Select School Home > Bulk Panel Selection

You will be presented with a list of students (allocated an APR) within the currently selected school. If you are responsible for more than one school this can be changed by selecting it from the ‘School’ drop-down list.

If you are returning to this page after having previously allocated staff to review panels, you may choose to display only students whose APR has no panel members by selecting the option ‘Show Only APRs with No Panel Members’.

(1) Select school from drop-down menu
By default the first student will be selected. The review panel information for this student is displayed on the lower half of the page. To move between students select a different student from the list or use the ‘Next’ and ‘Previous’ navigation buttons at the bottom of the page.

The left-hand list contains all staff members who have been added to the list of available panel members (Please refer to ‘Configuring the List of available Panel Members’ for further information). To add a member to the panel, select the staff member in the list of ‘Available Panel Members’ and click ‘Add’. This will move them to the ‘Selected Panel Members’ list. Each panel should have a minimum of two panel members.

Please Note: If a candidate’s supervisor has been added to the list of panel members for that school they will not appear in the list of ‘Available Panel Members’.
In addition, each panel should have a panel chair. To assign a panel chair, select the staff member from the ‘Selected Panel Members’ list and click ‘Add’. This will move them to ‘Panel Chair’. The Panel Chair has additional privileges in the system allowing them to record the panel outcome.

Conversely panel members and panel chair may be removed from an APR by selecting the staff member and clicking ‘Remove’.

To save the composition of the panel, click on the ‘Save & Go to Next APR’ button.
Once saved the panel selection will appear on the individual APR form under the ‘Panel Selection’ tab. In this section, external panel members may be recorded. Please refer to ‘Individual Panel Selection’ for further details.

**INDIVIDUAL PANEL SELECTION**

Panel members may be added to an individual APR by navigating to the ‘Panel Selection’ tab within the form. This function may be performed by either the school admin or panel chair (if assigned). Panel membership can be changed up until the panel recommendation is published.

This method of configuring the panel membership would be preferable where the composition of the panel changes close to the review date or for recording external (to UNSW) panel members.

If any panel members have been added to the APR using the ‘Bulk Panel Selection’ functionality, they will appear in either the ‘Selected Panel Members’ or ‘Selected Panel Chair’ lists as appropriate.

The left-hand list contains all staff members who have been added to the list of available panel members (Please refer to ‘Configuring the List of available Panel Members’ for further information). To add a member to the panel, select the staff member and click ‘Add’. This will move them to the ‘Selected Panel Members’ list. Each panel should have at least two panel members.
In addition, each panel should have a panel chair. To assign a panel chair, select the staff member from the ‘Selected Panel Members’ list and click ‘Add’. This will move them to ‘Panel Chair’.

Conversely panel members and panel chair may be removed from an APR by selecting the staff member and clicking ‘Remove’.

To save the composition of the panel, click on the ‘Save’ or ‘Next’ buttons.
Panel members who are external to UNSW can be recorded in the ‘External Members’ text box. External members are unable to access the form online, therefore will need to be provided with alternative means of viewing the form. Please refer to the section ‘External Panel Members’ for further information.

Selected panel members and the panel chair can view the form online. Please refer to the section ‘Providing Panel Members with Link’ for further information.

**Providing Panel Members with Link to APR Form**

Panel Members will need to be provided a link to view the individual APR form.

Panel Members who are internal to UNSW may be emailed a link by using the button on the ‘Panel Selection’ tab.

Once you have finalised the composition of the panel, click on the button ‘Send Email’. This sends an email notification to the Panel Members and Panel Chair with a link to the APR system enabling them to view the form online.

In cases where the composition of the panel changes, please be aware that this button sends an email to all panel members regardless of whether they received an earlier notification.
(1) Click button 'Send Email'
(2) An email notification is sent to the selected Panel Members and the Panel Chair

RECORDING THE PANEL OUTCOME

Figure 8 - Current Stage in Workflow
Details of the Panel Review are recorded in Section E of the APR form. Both the school admin and panel chair can access this functionality. If a supervisor has failed to supply sufficient information for the review, then the form may be returned to them by following the ‘Return to Supervisor’ link. You will be required to enter a reason and the action will be added to the APR status history.

(1) Select link to return the form to the supervisor
(2) Form of the review
(3) Review panel comments
(4) Panel recommendation

The information that needs to be captured during the panel review is listed in Table 6. This information may be recorded in the form during the review or captured using alternative means and the form completed after the review.

Table 6 - Panel Review Information

<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
<th>Options</th>
<th>Additional Information Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>E1. Form of Review</td>
<td>This is the form that the review meeting took. It may include more than one.</td>
<td>Meeting with Candidate</td>
<td>Date of Meeting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Written report by Student</td>
<td>Date Report Provided</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Seminar Presentation</td>
<td></td>
</tr>
<tr>
<td>E2. Panel Review Comments</td>
<td>Comments made by Panel during the review. In the case of marginal and unsatisfactory recommendations, these must include clear recommended actions and agreed milestones for assessment at the next review.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E3. Panel Recommendation</td>
<td>Assessment of the progress of the candidate during the previous 12 months (or since last review)</td>
<td>Satisfactory</td>
<td>Marginal</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Indicate whether a confirmation review for 1\textsuperscript{st} year PhD candidate, or Indicate whether a commencing PhD candidate prior to confirmation review, or Indicate whether a continuing PhD candidate, or Indicate whether MRes/MPhil student approved for transfer to a PhD candidature, or Indicate whether an MRes/MPhil student meeting all requirements</td>
<td>Indicate whether 1\textsuperscript{st} year PhD candidate whose confirmation period is extended. Provide date for an additional review at which time progress will be assessed, or Continuing PhD or MRes/MPhil student</td>
</tr>
</tbody>
</table>

Notes taken at the review may be scanned and attached to the form. These notes can then be referred to in the ‘Comments’ section. To upload an attachment, navigate to the ‘Attachments’ tab on the APR form. Under the heading ‘School / Panel Attachments’ click ‘Add Attachment’.

To remove an attachment, under the heading ‘School / Panel Attachments’ click ‘Delete Attachment’. Please refer to ‘Attachments’ section for further information.
Once the panel outcome has been recorded, the form can be submitted to the school admin for publication by clicking the ‘Submit’ button.

(1) Click ‘Submit’ to send the form to the School Administrator for publication

PUBLISHING THE PANEL OUTCOME
Figure 9 - Current Stage in Workflow

To make the panel’s recommendation available to the student the APR outcome must be published by the school administrator. In the event there was insufficient information provided at the panel review stage the form may be returned by selecting ‘Return to Panel for Amendment’ and clicking the ‘Submit Form’ button. You will be required to enter a reason and the action will be added to the APR status history.

To publish the outcome:

1. Select ‘Publish Outcome & Send to Student’
2. From the dropdown list select a suggested next review date.

This is the approximate date when the student is next due a review. The date entered here will determine the Reporting Period the student is placed in for next review. Satisfactory reviews default to the current date + 12 months; Marginal reviews default to the current
date + 6 months; Unsatisfactory reviews default to current date + 3 months. Optional comments may be added by the school administrator (Note: These comments will be viewable by student when published).

3. Click the ‘Submit Form’ button

![Form Diagram]

(1) Select ‘Publish Outcome’
(2) Select suggested next review date from drop-down menu
(3) Enter any additional comments (optional)
(4) Submit form

Once submitted, an email is sent to the student advising them that the panel recommendation is available to view online. The outcome of the review is then sent to NSS.

![Flowchart Diagram]

**Figure 10 - Publishing Panel Review Outcome**

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**MARGINAL & UNSATISFACTORY REVIEW OUTCOMES**

In the case of marginal and unsatisfactory review outcomes, there may be a need to hold another review within a short timeframe. In such cases, select a suggested review date to indicate when this review is to be held. There are no restrictions on the value of the date chosen; therefore this can be set to the current month if required. Proceed to publish the outcome as outlined above.

Where an additional review falls in a future reporting period and the student needs to complete this additional APR immediately, an individual form can be made available to this student by following the instructions outlined in ‘Creating an Individual APR’.

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**CHANGE OF SUPERVISOR**
If the panel recommended a change of supervisor as part of the review process, a separate form will need to downloaded from the GRS website and completed by the school admin.

**STUDENT ACKNOWLEDGEMENT**

Once a review outcome has been published, the student needs to acknowledge that they have seen the comments made by their supervisor and the review panel on their progress. The email sent to them when the review is published will request that they do this via the online system.

When acknowledging the outcome, the student can choose to provide additional comments on the review process. This will be sent via email to the school administrator and the GRS.

Students who have failed to acknowledge the outcome of their review can be managed via the relevant report. For further information, please refer to the ‘Reporting’ section.

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(1) Student indicates they have seen their supervisor’s comments and the panel’s recommendation
(2) Student may indicate they wish to add additional comments
(3) Comments entered by student in the space provided
A number of operational reports will be available to schools to assist in the APR process.

### GENERAL

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>List of all applications, offers, acceptances and enrolments for the school</td>
</tr>
<tr>
<td>Term Activations</td>
<td>List of all candidates who have been term activated for the selected semester. The column ‘Academic Load’ indicates their enrolment status</td>
</tr>
<tr>
<td>Term Activations Svr</td>
<td>As per ‘Term Activations’ but includes Supervisor Name and Type. There is one row for each Supervisor</td>
</tr>
</tbody>
</table>

### APR REPORTS

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>APR List</td>
<td>List of all Progress Reviews for the selected reporting period. Contains their latest status, supervisors, panel members and review outcome</td>
</tr>
<tr>
<td>APR Status</td>
<td>Contains a summary of the review statuses and outcomes for the selected reporting period.</td>
</tr>
</tbody>
</table>

### ACCESSING REPORTS

To access the reports, follow the following link (preferably using Internet Explorer):

If prompted, enter your zid and password (preceded by ADUNSW\()) as follows:

![Authentication Required](image)

This will display a list of reports in the browser window. To view, click the link for the required report.

![dvrpwb003/ReportServer_GRSSQLSERVER - /SchoolReports](image)

Select the Term/Reporting Period and the School from the drop-down menus and then click 'View Report'.

![Select Reporting Period](image)

Reports may be exported to Excel, by clicking on the ‘Export Icon’ and selecting ‘Excel’ from the drop-down menu.