



# **PGR Administrator Network**

Thursday 10 November 2016

## **Postgraduate Research Administrator Network**

**Thursday 10<sup>th</sup> November, 9.15 am-12.30 pm**

**The Manchester Dental Education Centre (MANDEC), Bridgeford Street**

**9.15 – 9.45 Registration** (*Tea/ Coffee provided*) (30 mins)

**9.45 – 9.50 Welcome** (5 mins)

*Vicky Turner, Graduate Education and Researcher Development, Research and Business Engagement Support Services (RBESS)*

**9.50-10.20 New Ethics Review System** (30 mins)

*Timothy Stibbs, Research Ethics, Governance and Integrity Manager, Principal and, Compliance & Risk, Research and Business Engagement Support Services (RBESS)*

**10.20-11.00 GRAD ED updates/eProg updates** (40 mins)

*Helen Baker, Head of Graduate Education and Researcher Development, Research and Business Engagement Support Services (RBESS) & Claire Hughes, Manchester Doctoral Centre Manager, Graduate Education (RBESS)*

**11.00 – 11.25 Networking Coffee Break** (*Tea/Coffee and Cake/Fruit*) (25 mins)

**11.25 – 11.35 Researcher Development Updates (PRES/Well-Being Strategy/PGR Destinations)**  
(10 mins)

*Mark Leech, University Researcher Development Co-ordinator, Graduate Education*

**11.35 – 11.45 ORCID**

(10 mins)

*Scott Taylor, Scholarly Communications Librarian*

**11.45-12.05 PGR Funding Process Review** (20 mins)

*Cath Dyson, Project Manager, Change Management and Process Improvement, IT Services*

**12.05-12.35 Q&A Session** (30 minutes)

**12.35 – 12.40 Closing Remarks** (5 mins)

*Vicky Turner, Graduate Education and Researcher Development, Research and Business Engagement Support Services (RBESS)*

## New Ethics Review System

<http://www.staffnet.manchester.ac.uk/services/rbess/governance/ethics/new-online-system-for-ethics-review-erm/>

<http://documents.manchester.ac.uk/display.aspx?DocID=29871>

# **Update on Graduate Education projects**

## **PGR Admin network – November 2016**

**Helen Baker**

*Head of Graduate Education and Researcher Development,  
Research and Business Engagement Support Services (RBESS)*

# Graduate Education update



- Policy updates
- PGR data / reports
- Processes and Systems
- RCUK (Researchfish, FAP, submission survey)
- PGR Space
- Promotional materials

# Policies

## □ Completed

- Launch of exams policies (+ subsequent minor changes)
- Minor changes to supervision policy
- Minor change to split site policy
- PGR Consultation website  
<http://www.staffnet.manchester.ac.uk/services/rbess/graduate/code/consultations--implementation/>

## □ In progress

- Presentation of theses (including alternative format) – submitted to Nov16 MDC
- Skills training policy - first redraft in preparation
- Fitness to study policy - TLSO developing new policy – 2<sup>nd</sup> workshop scheduled for end Nov 16

## □ What's next?

- Circumstances leading to change to postgraduate research study
  - Task and finish group – first meeting 26<sup>th</sup> January
  - Will include update in relation to 'shared parental leave'
  - Any key issues?

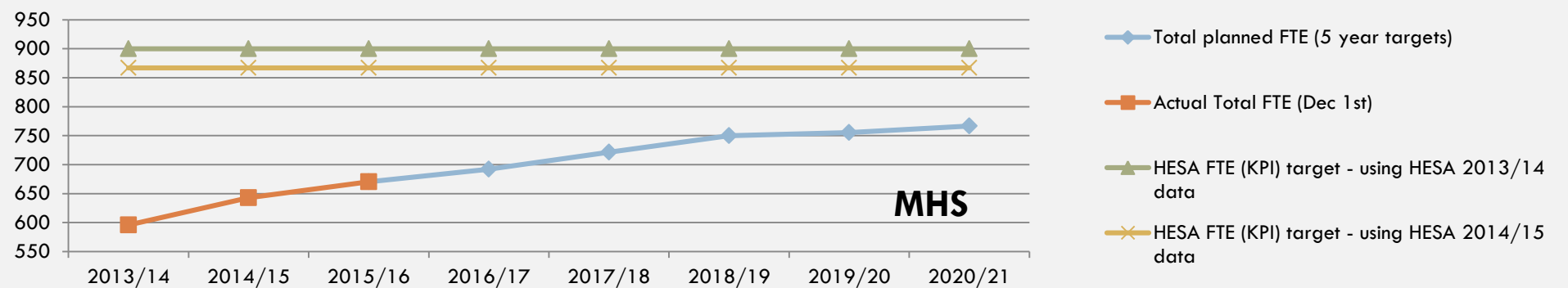
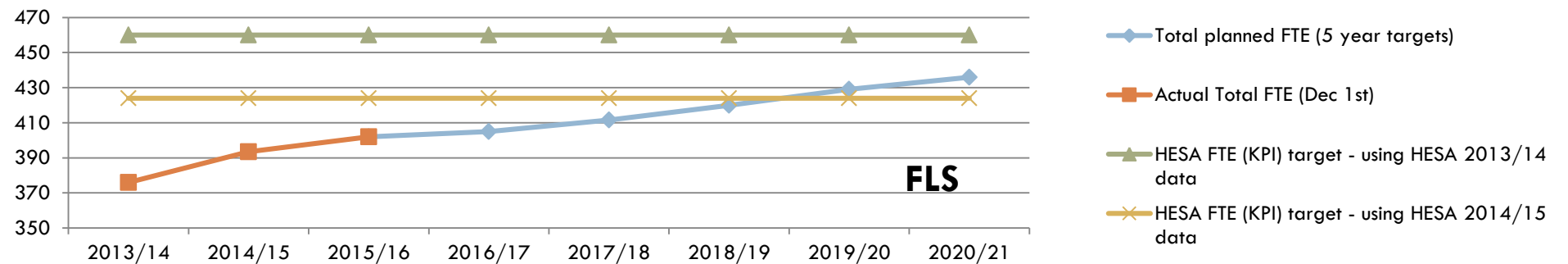
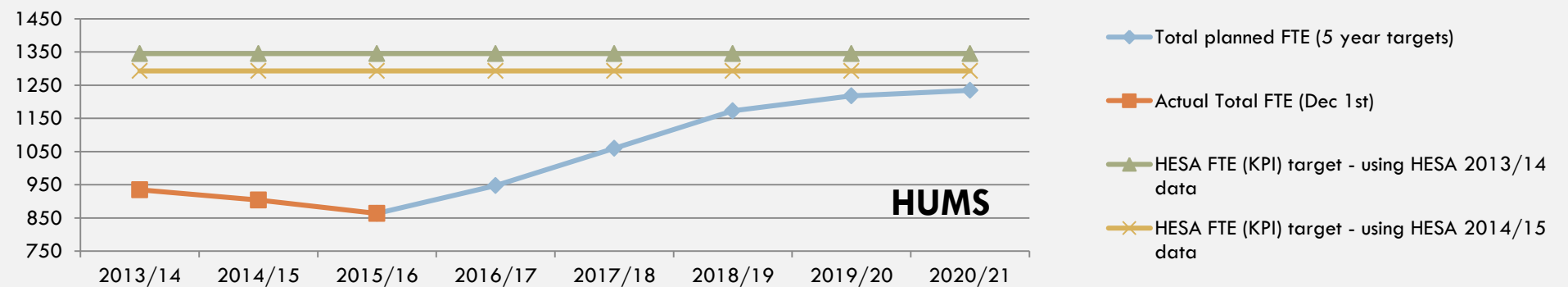
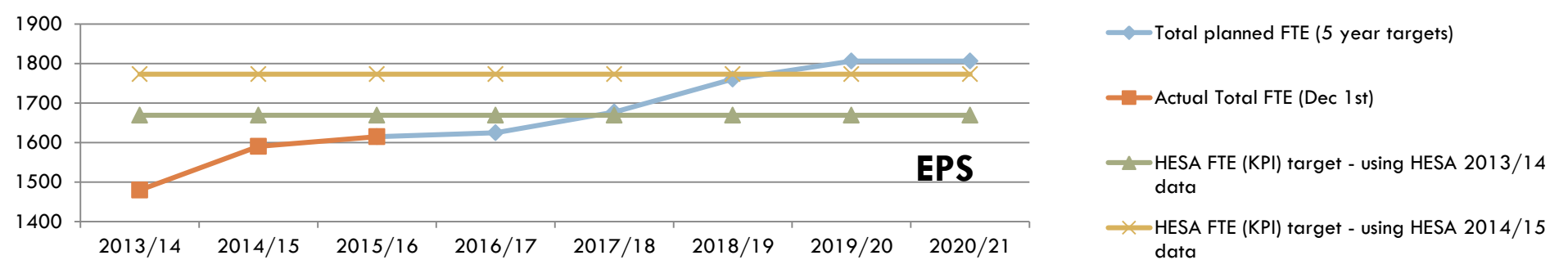
# Policies - minor policy revisions

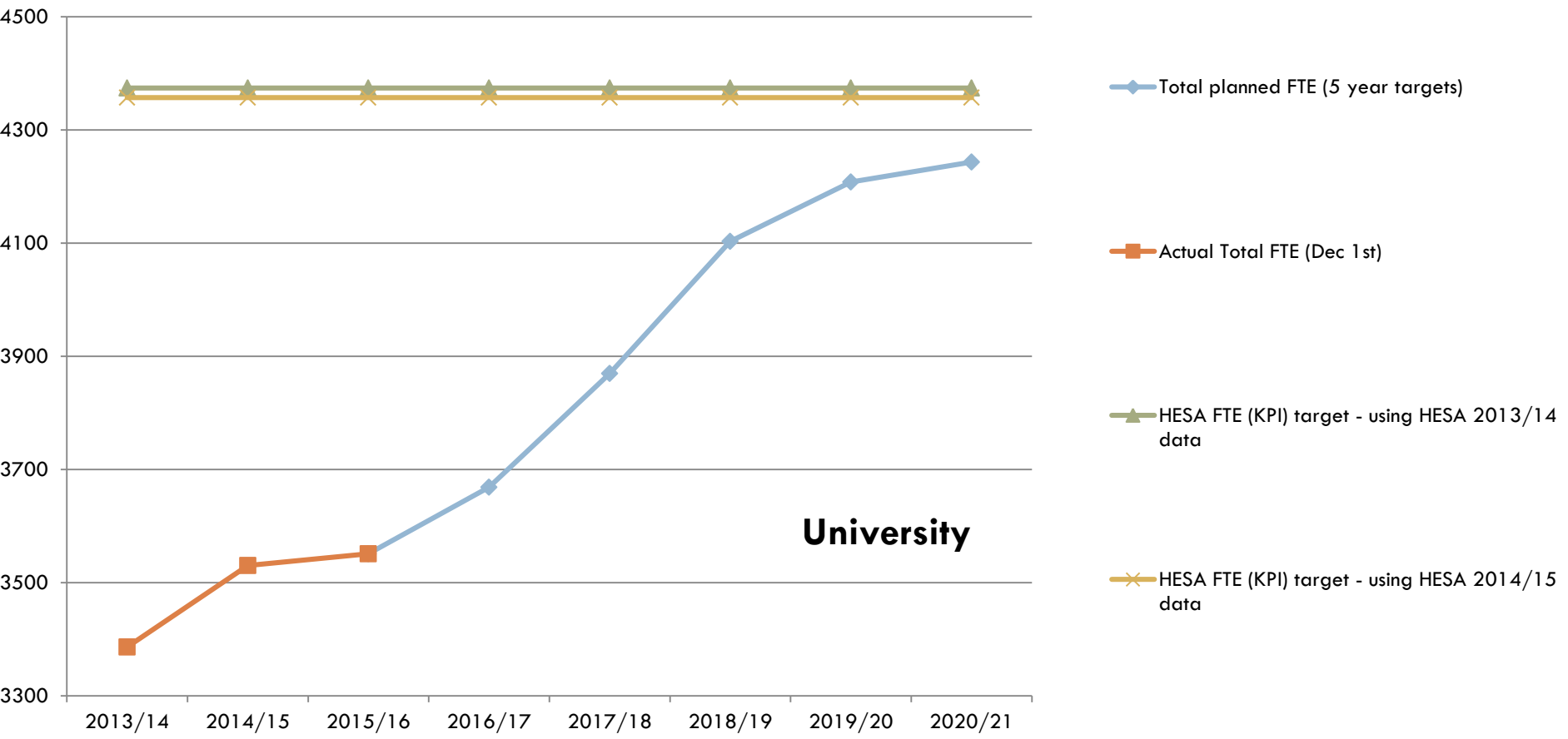
- **Examinations policies** – revised policies launched June 2016 (minor changes approved at Senate in Nov 2016)
  - Section 17xx: Amendment to the text to remove the 'end of year 2' deadline "The oral examination should normally be conducted in English. In exceptional circumstances, the internal examiner may request permission from the Faculty Graduate Office to conduct the oral examination in a language other than English. Permission must be sought from the relevant Faculty office before the end of year two of the students programme and be supported by a clear academic justification. It is advised that students discuss this with their Supervisors as early as possible. The examiners' report must still be written in English".
  - Section 22.3 Amendment to the text for Cii timeframes to fall in line with the timeframe allowed under Aii recommendations (NB: this only applies to the doctoral exams policy, not the MPhil exams policy as Cii awards are not permitted following examination of an MPhil):
  - "The time permitted for minor corrections to be completed by the candidate is **normally no more than four weeks** from the date the candidate receives the list of **corrections in the University's progression monitoring system** revisions. **In exceptional circumstances** where there are more than four weeks of work required of the student the candidate may be given 12 weeks to complete the corrections. The examiners' decision to allow 12 weeks of minor corrections to be completed, must be based on the quantity of the work required and length of time of which it is feasible to complete the corrections. **The Graduate Office must receive** notification that the minor corrections have been approved by the internal examiner ~~must be submitted to~~ via the University's progression monitoring system within **2 weeks of the candidate submitting the revisions this timeframe. In examinations where there is no internal examiner, the independent chair must ensure that minor revisions are approved and confirmed in the University's progression monitoring system by an external examiner or other person nominated by the School."**
  - The text has been updated to ensure consistency in that Ai, Aii, Ci, Cii award recommendations refer to 'corrections' and Bi, Bii, Biii, Ciii award recommendations refer to 'revisions'
  - ADs agreed at the September MDC that Biis will be removed from the list of recommendations in section 24.3 which normally need to be considered at the next PGRC. "The recommendations of category ~~B (iii)~~, B (iii) (referral with further research and a further oral) and categories C(i)-C(iv) (reject), will normally be considered at the next meeting of the appropriate School or Faculty postgraduate research degrees committee, where members will discuss individual cases and review examiners' reports."
- **Supervision policy** "3.1b Members of staff appointed as a main supervisor or co-supervisor should be full-time or part-time employees of the University, except where the member of staff is on an honorary contract and a member of an NHS Trust. Any member of staff who is still under probation, who is currently registered for a higher degree of any University, a visiting professor, a visiting fellow, a retired member of University staff, practising researchers on ~~a teaching focussed / teaching and scholarship contract~~ **an Academic Teaching contract** or a Emeritus professor will not be appointed as main supervisor but may be appointed as another member of the supervisory team." **Where staff employed on an Academic Teaching contract are undertaking pedagogic research and have an established track record in their field evidenced by publications, grants or external funding and a supportive research environment, a case for exceptional appointment as main supervisor may be put forward for consideration and approval to the relevant Associate Dean for Postgraduate Research.**
- **Split site policy** - The split site policy has been updated to reflect the fact that it applies to all doctoral programmes not just PhDs.

# PGR Data / Reports

- ❑ Discoverer / PGR Cube reports
  - ❑ SDM\_STU\_EPROG\_GENERAL\_REPORTS
  - ❑ SDM\_STU\_MDC\_EPROG\_REPORTS
  - ❑ SDM\_STU\_MDC\_PGR\_CUBE\_REPORTS
- ❑ eProg reports - SDM\_STU\_EPROG\_GENERAL\_REPORTS
  - ❑ Examinations - requested in the PGR reporting training sessions
    - Award recommendations by panel date (sit alongside the summaries by cohort year)
    - Examiners (per student) & no. of times nominated as examiner
  - ❑ Destinations report – under preparation
  - ❑ Research outputs report – under preparation
- ❑ Completions/submissions by supervisor – currently on test server
- ❑ ORCID reports (in progress)
- ❑ PGR targets







# Processes & Systems

- Marketing Recruitment and Admissions review – now part of SLP
- PG funding database - IT project ‘Stopped’
- PGR funding management
  - Business processes – standardised process maps and guidance docs (<http://www.staffnet.manchester.ac.uk/services/rbess/graduate/processandguidance/>)
  - Systems – management information reports on PGR funding
- eScholar thesis submission workflow – lead Lucy May
  - Default position - Open access within 12 months
  - Include supervisor in approval of thesis access settings
  - Aiming for delivery in Spring 2017
- External Examiner - checks for right to work in the UK
  - All people regardless of nationality or immigration status who are employed by the University even for a limited period, and whose main employment may be with another employer, must have their documents viewed, checked and copies kept to demonstrate that they have the right to work in the UK
  - Guidance notes / Flowchart / FAQ document <http://www.staffnet.manchester.ac.uk/services/rbess/graduate/code/submissionandexamination/>
  - Difficult scenarios

# Student Lifecycle Project

## □ Student Lifecycle Project

- ▣ September 2016 – PRC approved £25 million budget
- ▣ Key objectives / weighted criteria
  - Improve student experience
  - Improve staff experience
  - Improve efficiency and effectiveness
- ▣ Project delivery – September 2019
- ▣ New governance structure and project team being put in place
- ▣ Mobilisation by April 2017

# SLP / eProg

- What's happened to the eProg replacement project?
- What about the work that has already been completed as part of the eProg replacement project?
- What are the timeframes for a replacement solution for eProg? How do we align with the schedule of the SLP?
- How do we maintain PGR stakeholder engagement?
- What commitment will be required from the PGR community and when will PGR colleagues and eProg stakeholders need to be involved in SLP?
- Will SLP still deliver an improved solution for eProg?
- What system will we be using to deliver the replacement solution?
- What support is available for the current eProg during the timeframe of the SLP?

- An online facility that enables research funders and Research Organisations to track the impacts of their investments, and researchers to log the outputs, outcomes and impacts of their work
- **2016**
  - February 2016 first time RCUK funded students asked to submit outcomes
  - UoM PGR compliance figures = 69.4%
  - National Research Organisation PGR compliance average figure = 80%
- **2017**
  - Next submission period **6 February and 4pm on 16 March 2017**
  - Students whose awards started on or before the **5 February 2015** will be asked to submit a return
  - For those students with no outputs a nil return must still be submitted
  - Meeting set up with Faculty representatives to discuss details of 2017 submission

# Updates

## □ **Financial Assurance Programme (FAP) Visit 2016**

- 4<sup>th</sup> and 5<sup>th</sup> October 2016 RCUK FAP team visit
- Purpose of visit to examine institutional compliance with the terms and conditions which accompany our research funding
- 10 doctoral training grants examined across the Faculties
- Initial outcomes of FAP team due mid November 2016

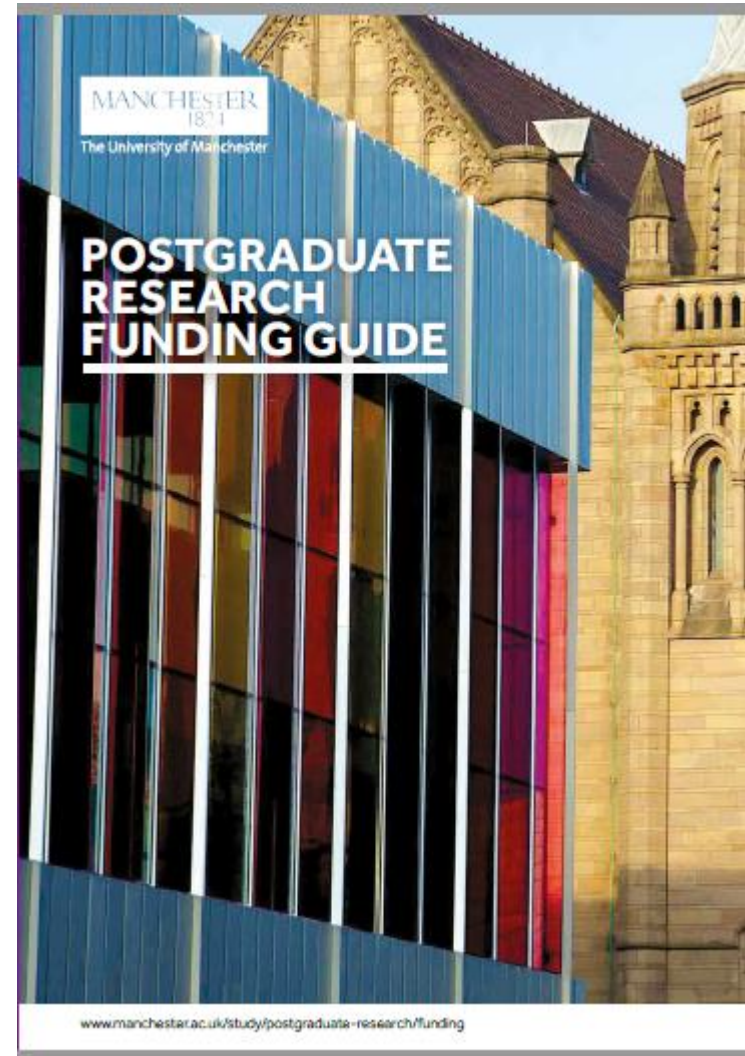
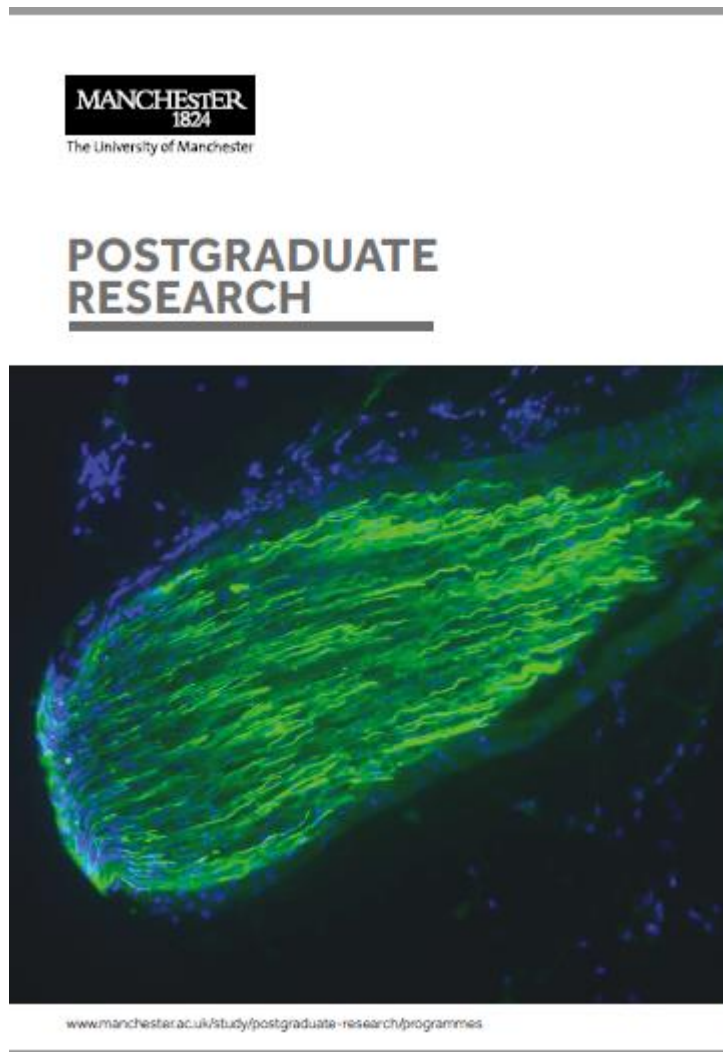
## □ **RCUK Submission Survey 2016**

- Opened 24 October - closes 6 December
- Faculties coordinating School PGR submission data
- MDC to undertake final sign off and submission

## □ **PGR Space**

- Main library redevelopment – Red Floor 3 – project on hold
- Discussions on going with library to ascertain PGR work/social space provision in interim

# Promotional materials





# PGR Development Updates



- Postgraduate Researcher Experience Survey (PRES)
- Well-being Strategy
- PGR Destinations Project
  - *PGR Career Development and Employability Strategy*

# PGR Development Updates

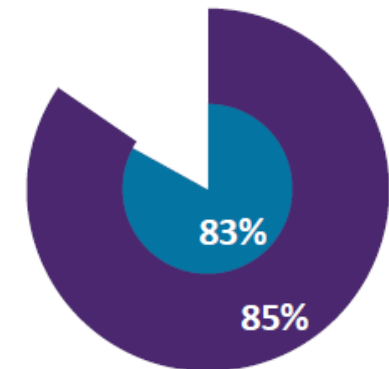
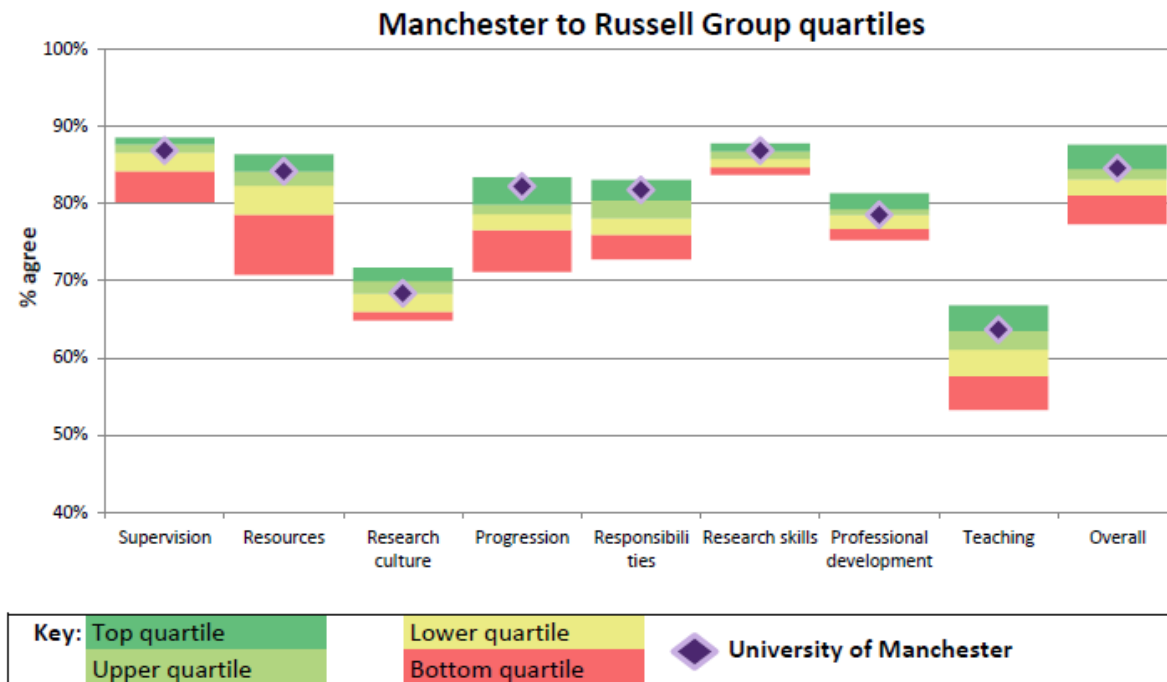


## Postgraduate Researcher Experience Survey (PRES) 2015

- 50% of eligible PGRs completed the survey
- School, Faculty and institutional Action Plans drawn up and progress overseen by the MDC
- Qualitative data analysis

# PRES 2015 – UoM vs. RG benchmark

Summary for University of Manchester compared to the Russell Group benchmark.



University of Manchester  
Russell Group  
**Overall satisfaction with course**

# PGR Development Updates



## PRES 2017

- 3<sup>rd</sup> April – 12<sup>th</sup> May 2017
- Surveys Working Group set up to oversee all surveys, including PRES (PTES, NSS)
- Communications strategy and plan to be circulated
- Targets?

# PGR Development Updates



## Well-being Strategy & Implementation Plan

Working with Paul Redmond and senior colleagues to develop a wellbeing strategy and implementation plan

- **Context:**
  - 15% of the UK population will reach clinical cut off for mild to moderate mental health problems
  - 10% moderate to severe
  - within this 10%, 2.5% are severe and enduring
  - 50% of those who meet these thresholds are likely to seek help
  - We all face the challenge of provision of services within the context of growing demand and the likely ceiling on demand not yet fully reached

# PGR Development Updates



## Well-being at the University

### **1. Wellbeing Strategy and Implementation Plan**

*Supporting students and staff to manage their well being and stay well (and to contain demand on services) i.e. **prevention***

### **2. Fitness to Study Policy and Mental Health Policy**

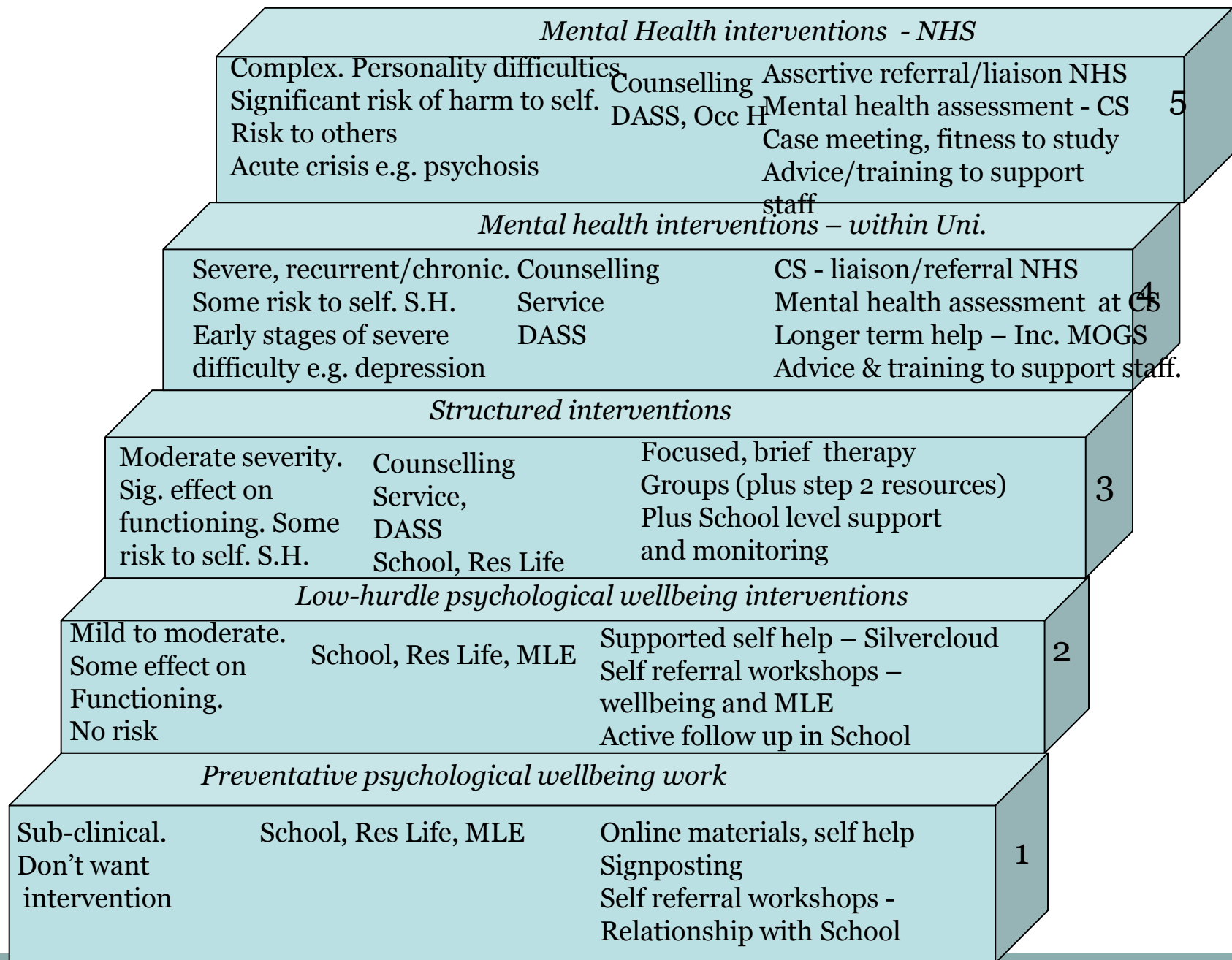
*Supporting students and staff with mental health problems i.e. **intervention and treatment***

# PGR Development Updates



## Well-being at the University – Intervention and treatment – **Stepped Care framework**

- Aims to identify a resource efficient way of delivering appropriate services to the largest number of people
- The intervention should be the least intensive of those available
- It should be flexible and responsive
- Outlines how the different support services (within and outside the University) might fit together in the area of mental health





# PGR Development Updates



## PGR Wellbeing

### Where are we at?

- **Consultation on a first draft** of a wellbeing strategy and implementation plan completed (resources, implementation framework)
- The University Wellbeing Management Group have **approved an amended version** of a wellbeing implementation plan which will undergo consultation with key stakeholder groups, including GAG, MDC, Faculty Committees for final approval
- PGR Wellbeing Ambassadors
- Clarify procedures and processes then produce clear guidance to Schools and Faculties about what support is available to PGRs and PGR – facing staff and what to do and when

# PGR Development Updates



## PGR Destinations Project (*including a PGR Career Development and Employability Strategy*)

### **Aim**

- To build a comprehensive data base (Data Warehouse) of PGR Career Destinations for use by key stakeholders at the University for recruiting, training etc purposes

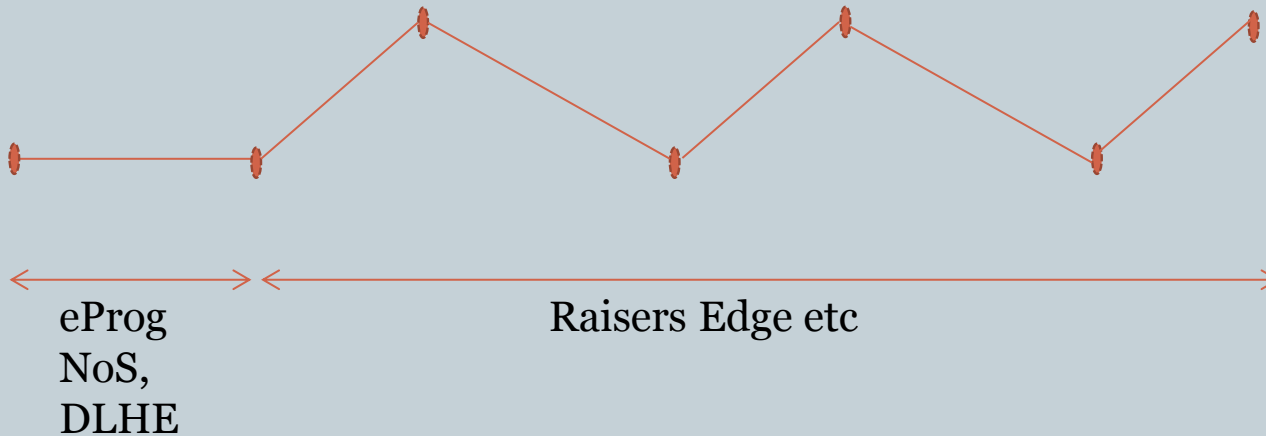
### **Data collection Strands**

- Data collection from supervisors
- eProg Notice of Submission form
- DLHE
- Others (*My Mentoring*, Alumni etc)

# PGR Development Updates



## PGR Destinations Project



# PGR Development Updates



## PGR Destinations Project

### **Where are we at?**

- DDRA undertaking a review of destinations data collection to identify optimum and most efficient routes
- DLHE data in Data Warehouse
- Projects underway to get eProg NoS form and Raisers Edge data into Data Warehouse
- Business Case proposal needed to:
  - Consolidate different data sets in Data Warehouse (what do we want and for what reason?)

# PGR Development Updates



## PGR Career Development and Employability Strategy

### **Principles behind strategy:**

- PGRs themselves take ownership of their futures
- The University should:
  - aim to provide processes which regularly encourage PGRs to consider their future
  - Provide support and opportunities which enrich PGRs' research programmes and their time at Manchester

### **Next steps:**

- Revise after consultation and present to December MDC Committee

# PGR Development Updates



## Other

- Making the Most of Manchester
- PGR reps



The University of Manchester

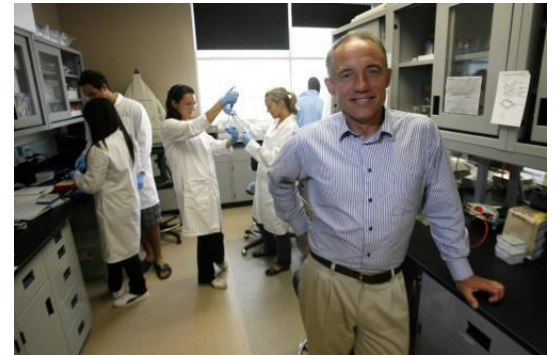
# PGR ORCID update

10 November 2016

---

Scott Taylor  
Scholarly Communication Team

# What are ORCIDs?





# What are ORCIDs?

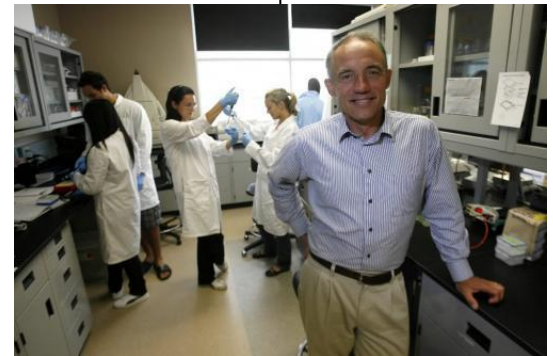
0000-0003-2355-7525



0000-0002-0387-880X



0000-0001-5887-2846



# What are ORCIDs?

0000-0003-2355-7525



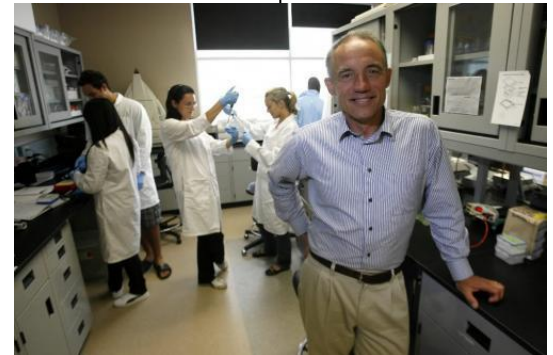
- Research outputs
- Grants
- Employment history

0000-0002-0387-880X



- Research outputs
- Grants
- Employment history

0000-0001-5887-2846



- Research outputs
- Grants
- Employment history

# What are ORCIDs?





The University of Manchester



The University of Manchester

## Standard Operating Procedure

Title:	Open Research and Contributor Identifier (ORCID) Registration Requirements		
Version:	1.0	Effective date:	TBC
Summary:	Describes ORCID requirements for researchers		

When using this document please ensure that the version you are using is the most up to date by checking on the University's online document system <http://documents.manchester.ac.uk/list.aspx> for any new versions.

### 1. PURPOSE

Open Researcher and Contributor IDs (ORCIDs) uniquely identify individual researchers and enable automated links to their affiliations, grants and scholarly works. This information is then openly available via a central registry.

The University has adopted this procedure to ensure that all researchers claim an ORCID as they become an increasingly ubiquitous component of the international research infrastructure.

### 2. SCOPE

This procedure applies to all University employees and students who undertake research.

### 3. REQUIREMENTS

Each employee or student must:

- ensure that they have claimed an ORCID and made this known to the University via appropriate system(s);
- ensure that their complete research output is recorded against their ORCID;
- provide their ORCID to publishers during manuscript submission where this option is available; and
- provide their ORCID to research funders during applications where this option is available.

Version	Date	Reason for change
1.0	July 2016	Creation

# What are the benefits of capturing ORCIDIDs?

- 1) Enable more accurate identification of research outputs arising from Manchester PGR programmes
- 2) Facilitate more accurate tracking and reporting of PGR student's next destinations and future research activities
- 3) Enable enhanced interoperability between local and external systems (e.g. HESA, Je-S, ResearchFish, EThOS)
- 4) Enable the institution to update student's ORCID accounts with research outputs and education affiliations
- 5) Reflect a commitment from the University to support and equip students with the necessary training and tools to begin a successful research career

# Implementing PGR ORCIDs



# Implementing PGR ORCIDs



# Implementing PGR ORCIDs

Dear FSE PGRs,

It is a [requirement](#) that all postgraduate researchers at the University of Manchester create an ORCID (Open Researcher and Contributor ID) and make it known to the University. ORCID is a non-profit organisation supported by a global community of organisations with interest in research. Your ORCID provides a unique research identifier that distinguishes you from every other researcher and links your professional activities. Registration to ORCID is free and will mean that research outputs can be tagged and tracked more easily throughout your career. ORCIDs are now routinely being requested by publishers and funders and it is therefore important that all researchers create an ORCID and make it available to the University.

## What do you need to do?

Registering for an ORCID is quick and easy and we have set up a dedicated web page to help you to claim your ORCID. You can create your ORCID and connect it to your student record by following a few simple steps on the following webpage:

[www.manchester.ac.uk/orcid/pgr](http://www.manchester.ac.uk/orcid/pgr).

If you have any questions about how to claim your ORCID please contact the Library's ORCID Support Service at [atuml.scholarlycommunication@manchester.ac.uk](mailto:atuml.scholarlycommunication@manchester.ac.uk). The Library will also be running a number of ORCID training sessions throughout semester 1. Further details and booking information will be available via [My Research Essentials](#) in September.

Best wishes,

Alex

Dr Alexander Hinchliffe





The University of Manchester



[www.manchester.ac.uk/orcid/pgr](http://www.manchester.ac.uk/orcid/pgr)

# Implementing PGR ORCIDs



The University of Manchester

The University of Manchester Library

[My Account](#)

[Search the site](#)



[Search Resources](#)

[Using the Library](#)

[Locations & Opening Hours](#)

[Special Collections](#)

[Contact](#)

[About](#)

[Services](#) / [ORCID](#) / [ORCID for PGRs](#)

[← The University of Manchester Library](#)

[← Using the Library](#)

[← Staff](#)

[← Research](#)

[← Services](#)

[← ORCID](#)

[✓ ORCID for PGRs](#)

[Create your ORCID](#)

## ORCID for PGRs

It is [a requirement](#) that all researchers create an ORCID (Open Research and Contributor ID) and make it known to the University. ORCID is a non-profit organisation supported by a global community of organisations with interest in research. Your ORCID provides a unique research identifier that distinguishes you from every other researcher and links your professional activities.

Registration to ORCID is free and will mean that your research outputs can be tagged and tracked more easily throughout your career. ORCIDs are now routinely being requested by publishers and funders and it is therefore important that all researchers create an ORCID and make it available to the University

By clicking the link below and following the onscreen prompts you will ensure that you have an ORCID and that it is connected to your student record.

[Proceed to create and/or connect your ORCID to your student account](#)

Can we help?

# Implementing PGR ORCIDs



The University of Manchester

## Login Service

Secure login for [The University of Manchester](http://The University of Manchester) websites and federated e-resources

### Please Login

Username:

Password:

☐ [Warn me before logging me into other sites.](#)

[Forgotten your password?](#)

Login

clear

In accessing and using information on University systems, I will comply with all applicable legislation, and regulations, policies and procedures of the University. I will only use this information in relation to my University duties and activities. I will not disclose any information that is subject to restrictions on disclosure.

[Important Security Advice](#)

[Your IT Accounts and Online Identity](#)

[Federated Access to Library Resources](#)

[My Manchester](#)



The University of Manchester

# Implementing PGR ORCIDs



The University of Manchester

The University of Manchester Library

[My Account](#)

[Search the site](#)



[Search Resources](#)

[Using the Library](#)

[Locations & Opening Hours](#)

[Special Collections](#)

[Contact](#)

[About](#)

[ORCID](#) / [ORCID for PGRs](#) / [Create your ORCID](#)

[← The University of Manchester Library](#)

[← Using the Library](#)

[← Staff](#)

[← Research](#)

[← Services](#)

[← ORCID](#)

[✓ ORCID for PGRs](#)

[Create your ORCID](#)

## Create or Connect your ORCID

When you connect your ORCID to your student account the University will request permission to write, update and delete items in the education, employment, funding, works and peer-review sections of your ORCID record.

You can request email notifications alerting you to changes that the University makes to your ORCID account, typical examples may include updating your educational affiliation or updating your account with your final thesis.

You may revoke these permissions within your account settings at any time after your programme has ended. The University will not have access to your ORCID password.

The default visibility of your profile is set to 'Public' which is the recommended setting, but you can set the visibility to limited or private.



[Create or Connect your ORCID](#)

Can we help?



# Implementing PGR ORCIDs

Already have an ORCID iD? [Sign In](#)

As per ORCID's [terms and conditions](#), you may only register for an ORCID iD for yourself.

First name  \* ?

Last name

Email  \*

Re-enter email  \*

Create an ORCID password  \* ?

Confirm ORCID password  \*

Your ORCID iD connects with your ORCID Record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.

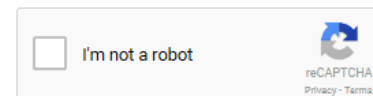
By default, who should be able to see information added to your ORCID Record?



## Email frequency

The ORCID registry provides notifications about things of interest, like changes to your ORCID record and new and events. How often would you like these notifications delivered to you via email?

Weekly summary



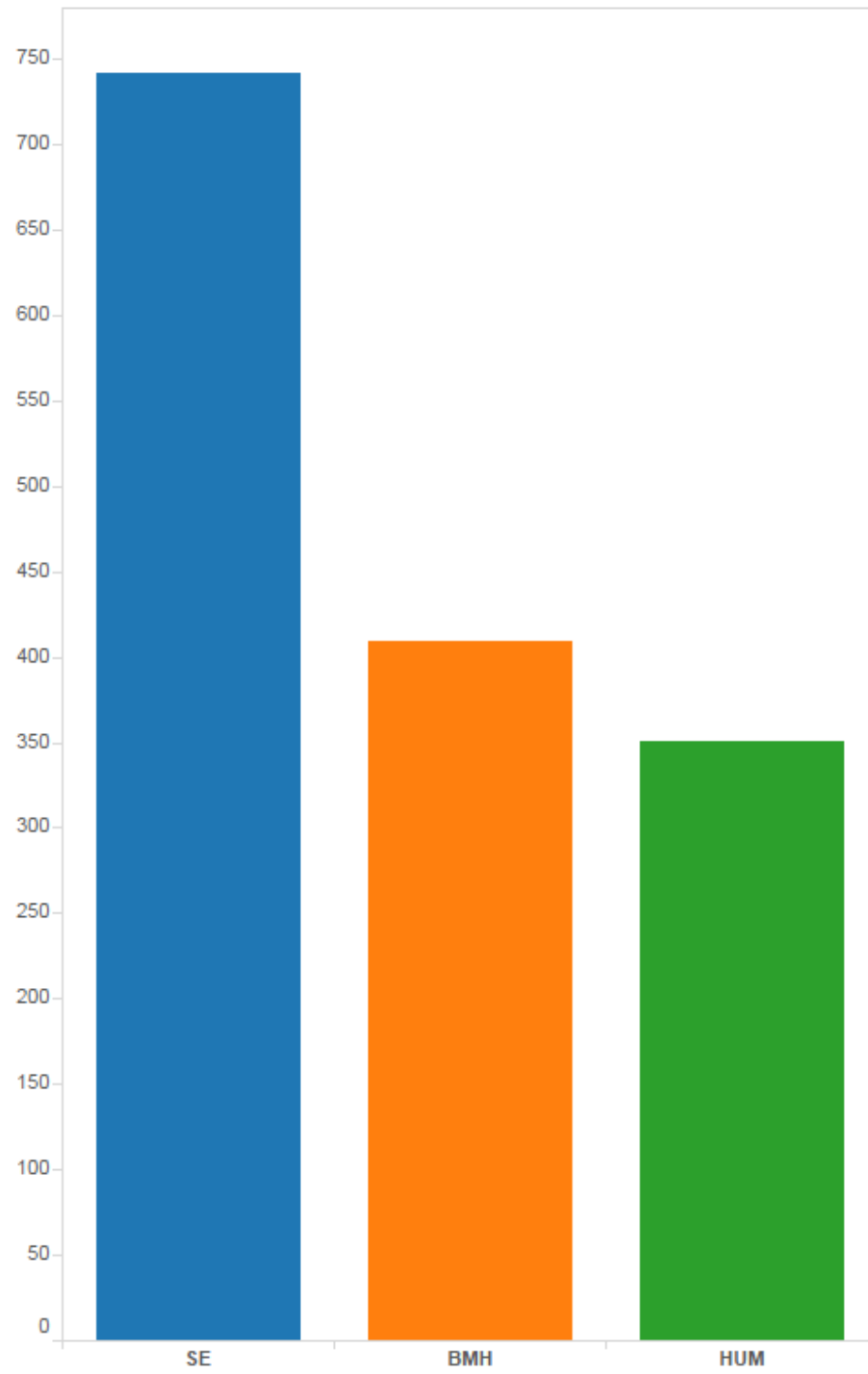
Terms of Use \*

☐ I consent to the [privacy policy](#) and [terms and conditions](#) of use, including agreeing to my data being processed in the US and being publicly accessible where marked Public.

**You must accept the terms and conditions to register.**

Deny

Authorize





The University of Manchester

**Thank you**

# PGR Funding Management Process Review

PGR Network

10<sup>th</sup> November 2016

Sponsor: Andrew Walsh

Champion – PGR Administration: Helen Baker

Champion – Finance: Nicola Cosens

Project Manager: Cath Dyson – CMPI

# Overview

- Project Goals and Team
- Project Outputs
- What does this mean for PGR Administration?
- Next Steps



# Project Goals

- ensure **compliance** with the specific terms and conditions attached to external funding awards
- ensure all parts of the process are completed **effectively and efficiently in a consistent manner** across the institution to meet the needs of all stakeholders
- to **clarify roles and responsibilities** within the processes and ensure that risks around single points of failure and segregation of duties have been addressed
- enable the **accurate and consistent recording of information** within and between systems, e.g. Oracle Financials, Campus Solutions and JES (Joint Electronic System), etc., which will support effective reporting on PGR funding at all levels
- ensure **SORP compliance** when recording PG-R funding

# Who are the Project Team

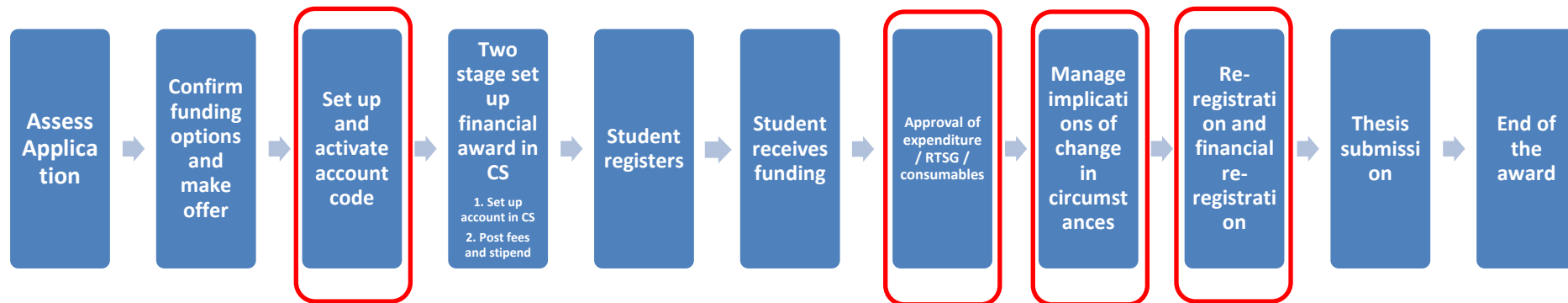
Name	Representing	Project Role
Andrew Walsh	Director of RBESS	Project Sponsor
Nicola Cosens	Finance	Project Champion
Helen Baker	Graduate Education	Project Champion
Claire Hughes	Graduate Education	Team member
Anusarin Lowe	PGR Admin (Humanities)	Team member
Carole Douguedroit-Arrowsmith	PGR Admin (Humanities)	Team member
Wayne Ferris	Finance (Humanities)	Team member
Miranda Hall	Finance (Humanities)	Team member
Lee Wilkinson	PGR Admin (EPS)	Team member
Stephen Chipp	Finance (EPS)	Team member
Faye Kirkley	Finance (EPS)	Team member
James Power	PGR Admin (FBMH / MHS)	Team member
Helen Eccles	PGR Admin (FBMH / MHS)	Team member
Anna Lawless	PGR Admin (FBMH / FLS)	Team member
Jessica Bowler	PGR Admin (FBMH / FLS)	Team member
Michael McGlinchey	PGR Admin (FBMH / FLS)	Team member
Nicholas Davison	Finance (FBMH / MHS)	Team member
Clare Wood	Finance (FBMH / MHS)	Team member
Stuart Renshaw	Finance (FBMH / FLS)	Team member
Gemma Lyons	Finance (FBMH)	Team member
John Halliwell	FOMs	Team Member
Patrick Ryan	SSC	Team member
Sian Nash	SSO	Team member

++++

<http://www.staffnet.manchester.ac.uk/services/rbess/graduate/processandguidance/>

# Project Outputs

## Agreed High Level Process



# Project Outputs

## Three Key Phases only

- Set up and Activate Activity Code
- Approval of Expenditure RTSG / Consumables
- Change in Circumstances including
  - Re-registration / Progression

# Project Outputs

## Process Maps

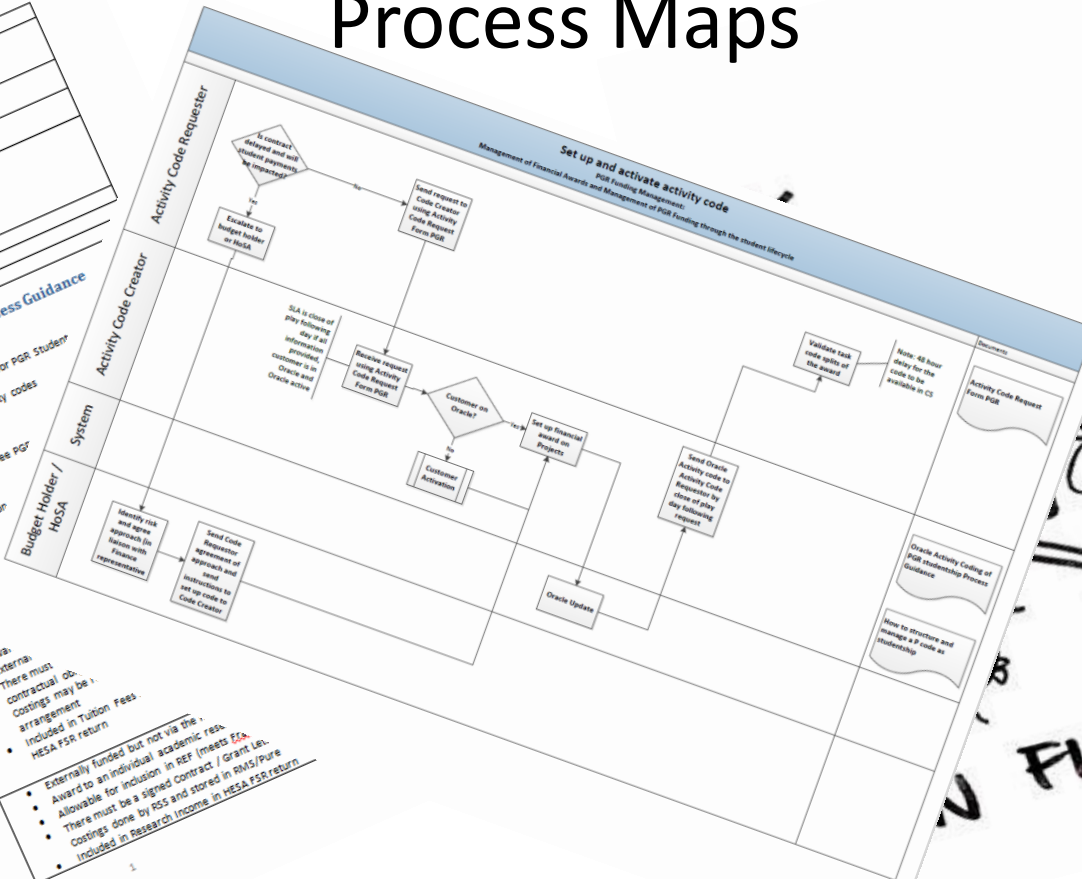
Version	Oracle Activity Coding for PGR Studentships: Process Guidance
Date produced	PGR Admin and CDTs PGR Finance PGR Teams Graduate Administrator's Group Hoffbas PGR Management Group PGR / Supervisors Nicola Collins Helen Baker Nicholas Davison Claire Hughes John Halliwell
Review Date	June 2018 June 2018

### Introduction

- This guide defines the process for setting up Oracle Activity codes for PGR Studentships. Oracle Activity codes should be used for supporting the process.
- Which type of Oracle Activity code should be used
  - Who is responsible for supporting the process
  - The different types of PGR studentships available (see PGR eligibility and Terms and Conditions)
- Support for PGR students is a cross Faculty, cross function at Faculty and School level by the PGR administrators. Services (PGR) colleagues (where there is a link with Finance).

### What codes are available

Summary / Example	Code	Chars.
Primary purpose to fund student training e.g. DTG, CASE Award	P	<ul style="list-style-type: none"> <li>Awa.</li> <li>External.</li> <li>There must be contractual ob.</li> <li>Costings may be included in Tuition Fees.</li> <li>HESA PSR return</li> </ul>
Primary purpose to deliver research output where a student is a resource on the project	R	<ul style="list-style-type: none"> <li>Externally funded but not via the res.</li> <li>Award to an individual academic res.</li> <li>Allowable for inclusion in REF (meets ES).</li> <li>There must be a signed Contract / Grant Let.</li> <li>Costings done by PGR and stored in RAS/Pure</li> <li>Included in research income in HESA PSR return</li> </ul>



Process Guidance

Process Roles

# What does it mean for PGR Administration?

The screenshot shows the StaffNet website interface. At the top, there is a purple header with the Manchester 1824 logo and the text 'StaffNet'. A search bar is located in the top right corner. Below the header is a navigation menu with links: Home, Working here, News, Departments, Resources, Community, and A-Z. A breadcrumb trail indicates the current location: StaffNet / Services / Research and Business Engagement Support Services / Graduate education / Postgraduate Funding Processes and Guidance. On the left side, there is a sidebar menu with a tree structure. The 'Postgraduate Funding Processes and Guidance' section is expanded, showing sub-links: Introduction, Set up and Activate Activity Code, Approval of Expenditure RTSG/ Consumables, Change in Circumstances including Re-registration/ Progression, and a 'Close' link at the bottom. The main content area is titled 'Postgraduate Research Funding Management' and contains a 'Foreword:' section. The foreword text states that the Postgraduate Funding Management Group was established in 2014 and aims to develop a standard cross Faculty process for PGR Funding management. It also mentions that the project has developed process maps and guidance documents. At the bottom of the foreword, it provides a link to the University's funding website for general information and a link to a feedback survey for documentation feedback.

MANCHESTER 1824  
The University of Manchester

StaffNet

Search

Home Working here News Departments Resources Community A-Z

StaffNet / Services / Research and Business Engagement Support Services / Graduate education / Postgraduate Funding Processes and Guidance

< StaffNet  
 < Services  
 < Research and Business Engagement Support Services  
 < Graduate education  
 ✓ Postgraduate Funding Processes and Guidance  
 Introduction  
 Set up and Activate Activity Code  
 Approval of Expenditure RTSG/ Consumables  
 Change in Circumstances including Re-registration/ Progression  
 Close

## Postgraduate Research Funding Management

### Foreword:

The Postgraduate Funding Management Group was established in 2014 and comprised of representatives from PGR Administration and Finance from across the University. The goal of the group was to develop a standard cross Faculty process for the management of PGR Funding throughout the Student Lifecycle which in turn would ensure compliance with funder terms and conditions; result in accurate and consistent recording of information in all systems and ensure all parts of the PGR Funding Management process were completed efficiently and effectively with clear roles and responsibilities.

The PGR Funding Management project has developed a series of process maps and guidance documents which are intended to provide best practice for PGR Administration and Finance colleagues involved in delivering the PGR Funding Management process.

It is anticipated that the documentation produced via the PGR Funding Management project will evolve over time, responding to both internal and external requirements and ensuring processes are as effective and efficient as possible. All feedback is welcome and should be directed to the Graduate Education team in Research and Business Engagement Support Services.

General information on sources of funding for postgraduate students can be found on the [University's funding website](#)

If you have any feedback on the documentation, please complete the [feedback survey](#)

<http://www.staffnet.manchester.ac.uk/services/rbess/graduate/processandguidance/>

# Next Steps – PGR Administration

- Promote and embed in local activity and roles
- Review and use the resources
- Feedback on the resources

<http://www.staffnet.manchester.ac.uk/services/rbess/graduate/processandguidance/>

# Next Steps – Project Team

- Pilot the documentation including gathering feedback from students
- Develop agreed cross Faculty process for managing reclaiming overpayments of stipend (to include PGR Admin, Finance and Credit Control)
- Review process and documentation in February - using YOUR feedback
- Identify further actions for these 3 phases
- Identify next phase(s) for improvement



# Thank you



[http://www.staffnet.manchester.ac.uk/services/rbess/graduate/  
processandguidance/](http://www.staffnet.manchester.ac.uk/services/rbess/graduate/processandguidance/)

# Thank you for attending

## **PGR Administrator Network organisation committee:**

Janine Calland (EPS)

Marie Davies (EPS)

Jackie Boardman (HUMs)

Vicky Turner (RBESS)