# Help guide for Faculties

Research Officer Interface

The Faculty Research Officer (RO) is the administrative staff member within the faculty/school responsible for HDR.

1. Accessing HDR Online

We recommend Chrome or Firefox to log in to ResearchMaster (RM).

As the RO, you can log into RM using your staff ID and password. If logging in remotely, go to https://vpn.uts.edu.au/my.policy and select ResearchMaster under 'Staff Resources'.
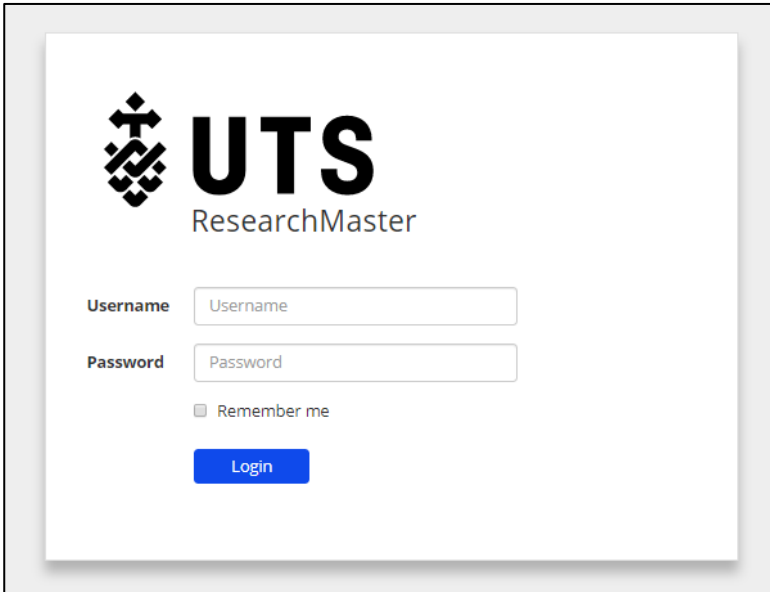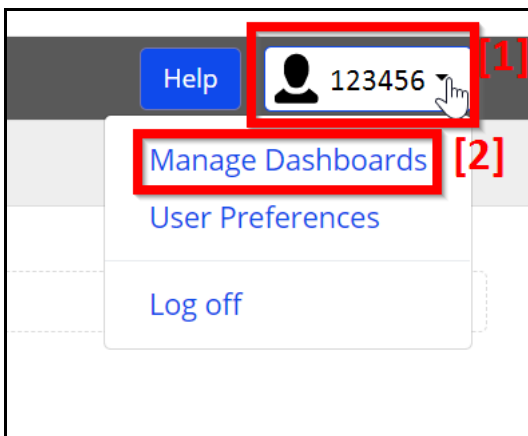

The Research Officer Dashboard will show all HDR eForms for action in their queue.

2. Research Officer Dashboard

You can set up a Dashboard as your favourite. When logging in for the first time into RM, you might be asked to select your default dashboard.
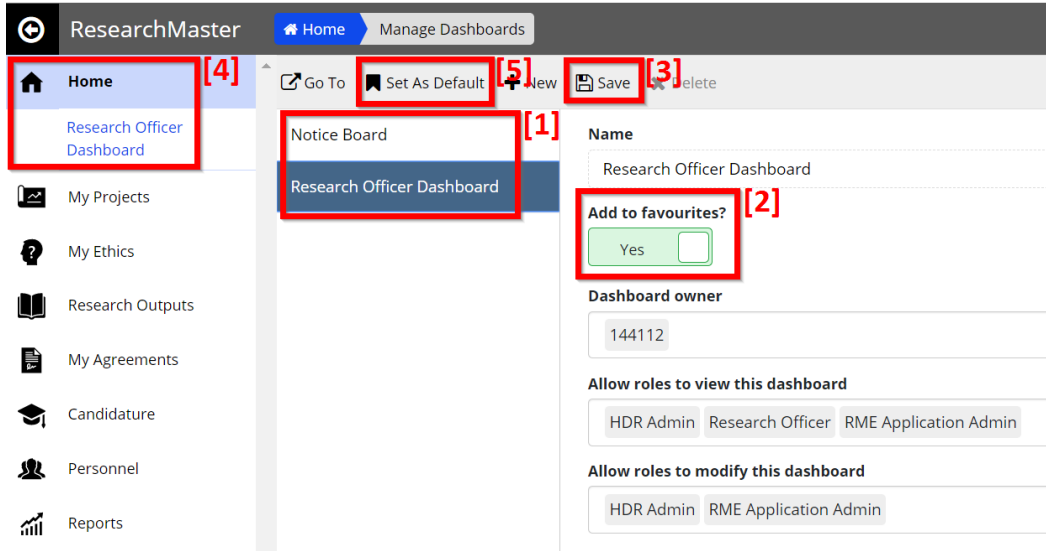To change it or set one up if you aren't asked the question, click on your staff ID [1] on the top right to open the session menu and chose the 'Manage Dashboards' option [2].

If you have more than one dashboard to choose from, you can select the one you want to add [1] and make sure 'Yes' is set under 'Add to favourites' [2], then click 'Save' [3]. Any dashboards selected as favourites will then appear under the Home menu on the right [4].

By clicking on 'Set As Default' [5] the selected dashboard opens automatically on login.

3. Processing Forms

A shortcut to "HDR Forms for your action" should appear on the Research Officer Dashboard
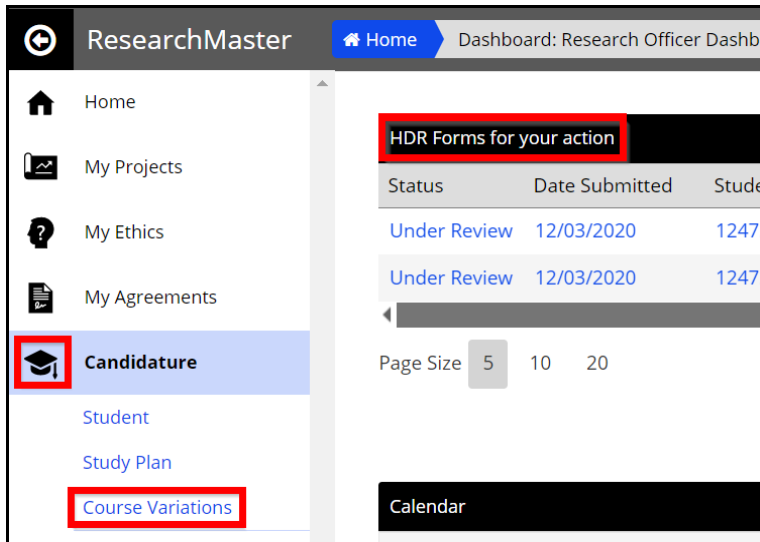
You can also get to them by clicking on the mortarboard icon in the left-hand navigation bar, and selecting 'Course Variations'. Select the 'For Review' tab.

Forms requiring your attention will display a Workflow State of '[FACRO] RO Review' or '[FACRO] RO to Assign Supervisor Signatory':

There are three stages where you may be required to take action on a form. The Workflow State will indicate [FACRO] RO Review, and the Status may be:
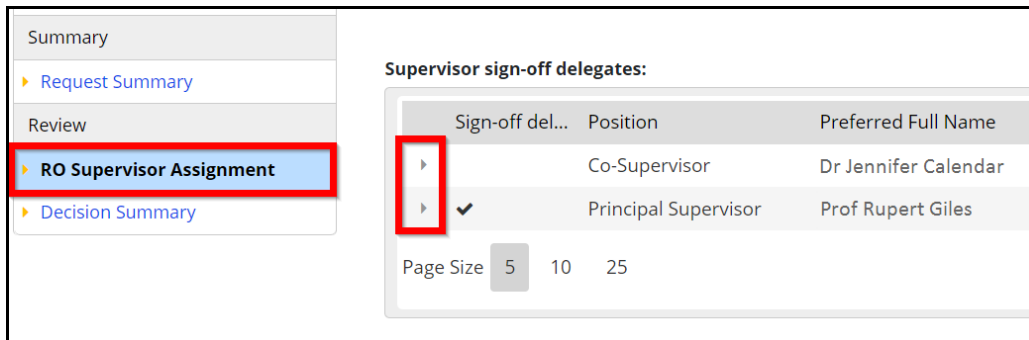
- Under Review - After a student has supervisor has endorsed a form
- Re-submitted - After a student re-submits a returned form
- Returned - After an RAO has sent a form back to you for further clarification

At any of these stages, click on any field to open the form.

4. Assign Supervisor Sign-off

By default, all forms submitted by HDR students are assigned to their Principal Supervisor. They will show the student's supervisory panel on a grid at the bottom of the "Request Summary" page of the application. The students cannot amend this but can indicate on the form whether their principal supervisor is available. If they select 'No', the form will come directly to you for action.
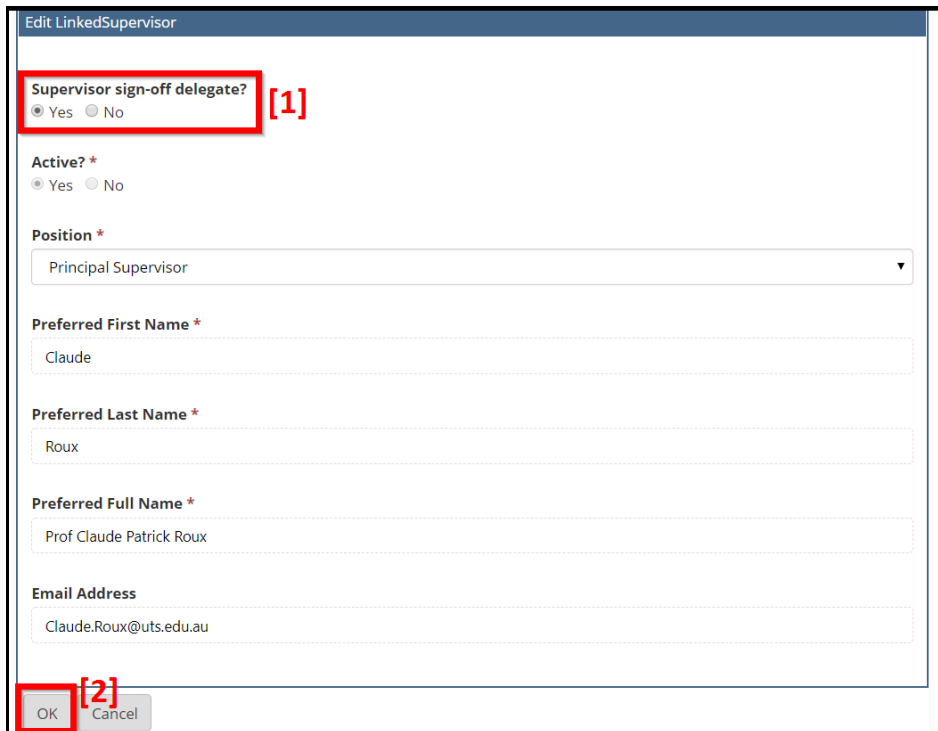
To nominate an alternate supervisor as the Signatory, please go to the 'RO Supervisor Assignment' page and click on the triangle to the left of the presently selected Sign-off delegate,

Change to 'No' under the question 'Supervisor sign-off delegate?' [1] and click 'OK' [2]. Repeat for the other Supervisor and change the response to 'Yes'


If you know that the Principal Supervisor is unavailable and the student selected 'Yes' to the supervisor availability question, you can manually re-assign the form to be reviewed by a Co-supervisor. There are two options to do so:

1. Click on the "Application" link from the email sent to the Supervisor (CC to you). Then follow the instructions on step 3

2. Go to "My Course Variations" [2] under "My Candidature" [1] and select the "Advance" tab [3]. There should be a default search criteria [4] to look for 'Course Variations' (forms) where the 'Workflow Completed' is 'No'. Click on the "Results" tab [5] to see a list of all the active forms (from Draft to Processing") within your School/Faculty. Find the application and click on the status to open it.
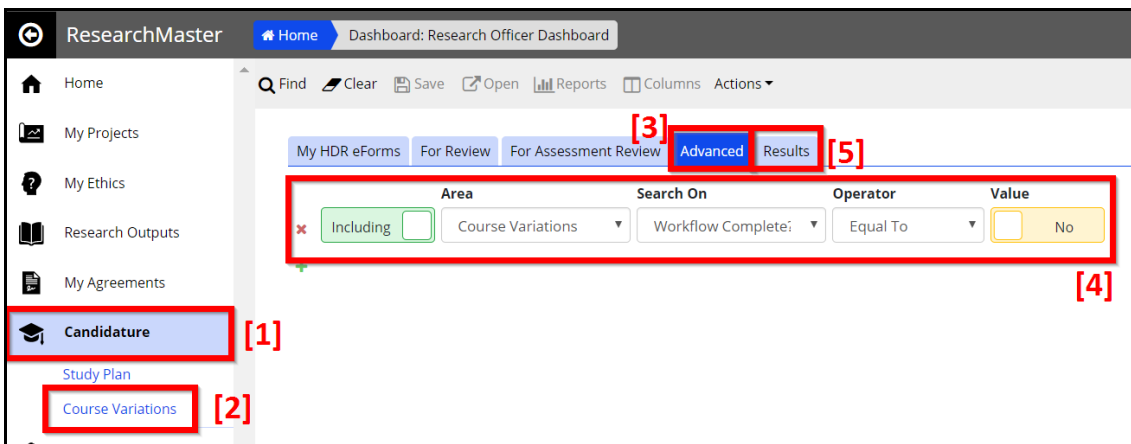
3. Go to "Request Summary" page and scroll down to the very bottom to find the "Supervisors sign-off delegates" grid. Click on the little arrow at the front of the line to open the information, change the "Supervisor sign-off delegate" from yes to no or vice versa and click OK. The tick should then be next to the other supervisor's name. Click Save on the right and notify the Co-supervisor they need to action a student request, as the change will not trigger a system email.
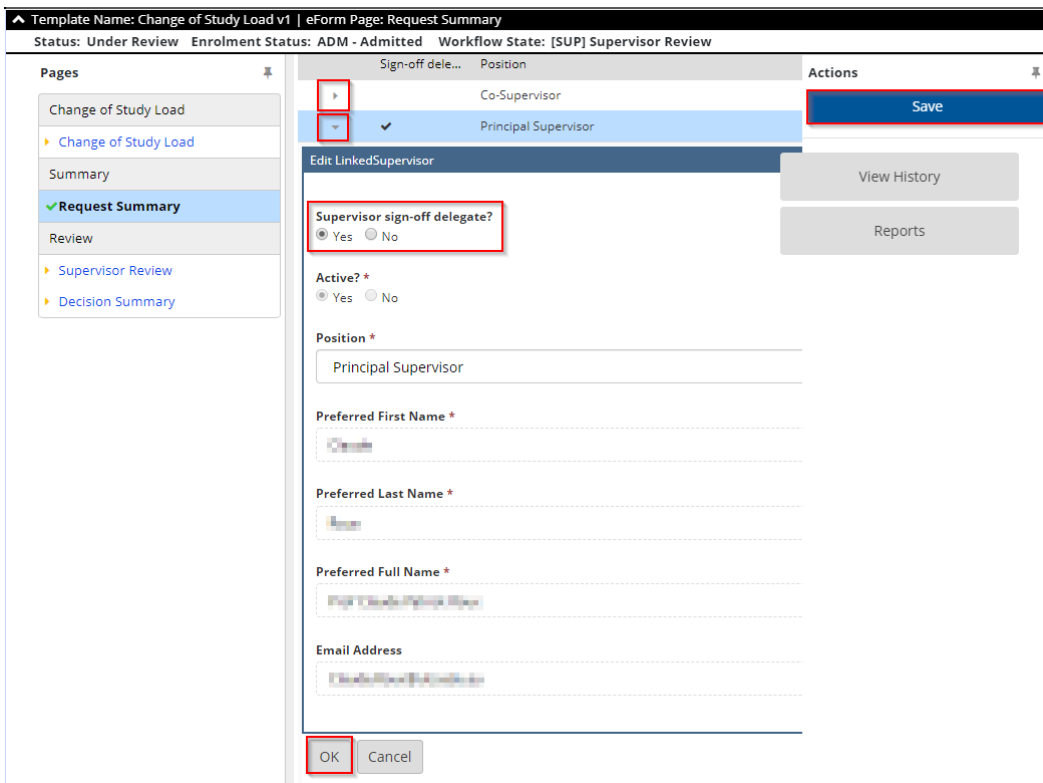
5. Refresh supervisory panel

Whenever a student starts an Application in ResearchMaster, the action takes a 'screenshot' of the student's current state. Therefore if a change of supervisor is processed after an application is started, the supervisory panel will not reflect the change and display the old supervisor(s). But the change can be manually forced onto any form in progress (but not completed forms) and at any time.

Step 1: verify the supervisory panel in RM.

Logging in, go to 'Candidature' [1] and select 'Student' [2] from the left hand menu. Enter either their name or student ID in the respective field [3]. Remember less is more as RM will only look for an exact match. Then click on the 'Results' tab [4], the 'Find' button in the top menu or hit enter.

Then from the results page, click on the hyper-linked 'Student Code' to open up the Student page.

Scroll to the very bottom of the page and go to the 'Enrolment & Progress' tab [1] (should be open by default) and select the 'Course Code' [2] marked as 'Current/Primary' [3] if there is more than one.

Scroll to the bottom of the page again and under the 'Supervisor' tab (default) you will see the supervisory panel. If it is different to what it should be, please contact GRS. Supervisors without a tick in the 'Active?' column (and with an 'Involved To' date) are no longer current supervisors for this particular student.

Step 2: confirm the form has the current/up-dated configuration of the panel on the student's application.

Go to 'Candidature' [1] again and select 'Course Variations' [2] from the left hand menu. Click on the 'Advanced' tab [3]. Add a second search criteria by clicking on the green cross [4], select 'Student ID' as the 'Search On' criteria and enter

the student ID in the 'Value' field [6]. Once done, either click on 'Results' or hit enter.


Open the application and got to either the Request Summary

or Supervisor Details page.

If the panel is different to the configuration on the student record, go back to the search results by click on 'Course Variate Search' in the breadcrumb above the top menu. Tick [1] the form that requires the supervisory panel up-dated, click 'Actions' [2] in the top menu and select 'Reload Supervisors' [3]
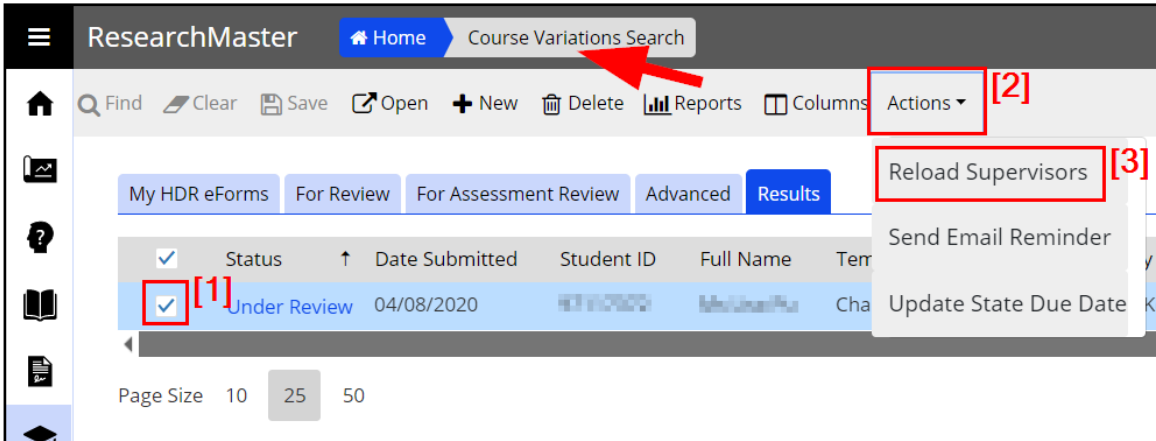
In the pop-up window, click the 'Start Action' button. You will see the word 'Processing' show up to the left of the line being up-dated, under the 'action Successful?' column. It will change to 'Yes' once complete at which stage the supervisory panel will have been up-dated.
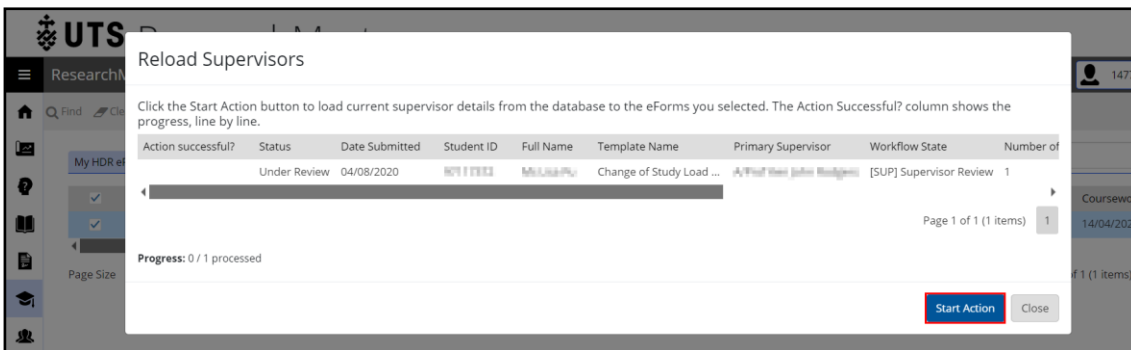
If the form is at the 'Supervisor Review' stage, the email notification to the newly assigned supervisor will not be triggered, You will need to notify them separately.

6. Reviewing a submitted form

In the form, review the student application under the 'Request Summary' [1] and the supervisor's response under the 'Decision Summary [2]. Once you have made your decision, proceed to the 'RO Review' [3]:
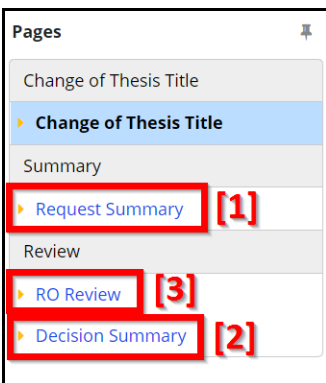
7. Conflict of interest / Appoint an RAO

You are required to appoint an RAO reviewer and confirm that there is no conflict of interest. If there is a conflict (eg. if the listed RAO is the supervisor), there is an option to nominate a new alternative RAO.

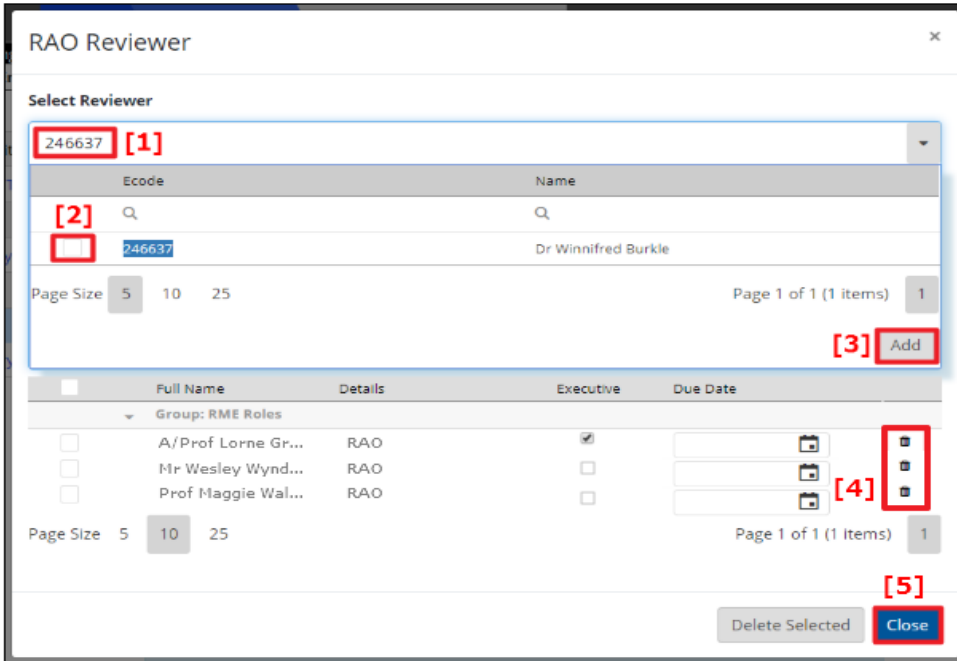To appoint the RAO, select the RAO Reviewer button in the top right corner:

Actions 📌

Save

Proceed with Selection

RAO Reviewer

The first time you review the RAO panel, there might be multiple names. You remove all names until there is only one left - your chosen RAO reviewer. The system will remember your selection and next time you process a form, you might need to change the RAO again.
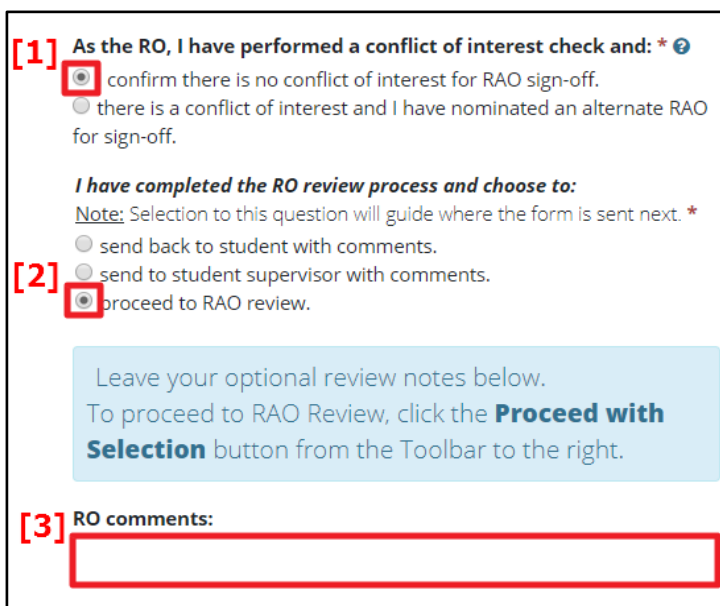

If your desired reviewer does not appear in the list, you can add them by finding them in the Search field [1]. Note that the search is limited in that it must be an exact match for their name. Alternatively you can search via staff ID if you have it. When they appear, select them [2], then add them to the reviewer list [3].

Once your reviewer appears in the list, remove all other reviewers by clicking on the delete icon [4] next to their name. Once there is only one name in the list, Close [5] the RAO Review panel.

8. Recording Your Decision

After evaluating the change request and confirming the RAO, indicate your decision. To approve:

Confirm there is no conflict of interest with the RAO [1], select 'Proceed to RAO review' [2], and leave any optional comments [3].

However, if the form is not yet ready to be advanced, in some cases you may send it back to the student or supervisor for clarification:

I have completed the RO review process and choose to:
Note: Selection to this question will guide where the form is sent next. *

○ send back to student with comments.
○ send to student supervisor with comments.
○ proceed to RAO review.

Note: In some cases, you cannot directly send the form back to the supervisor or student. If any options are missing that you need, please contact the GRO who can assist.

If you are sending a form back, please leave a comment and further instructions. To do so:

Review comments directed at the student's supervisor: 💬 **[1]**

Use the system commenting feature to direct Action comments towards the

Action Comments **+ Add** **[2]**

✱ Lorem ipsum dolor sit amet, consectetur adipiscing elit **[3]**

| B | I | U | S̶ | x² | x₂ | A | ¶ | ≡ | ☰ | ☷ | ⬅ | ⬅ |

Duis at leo vitae tellus varius iaculis ac ac ex. Vivamus in mi in sapien **[4]**

[5]

Post   Cancel
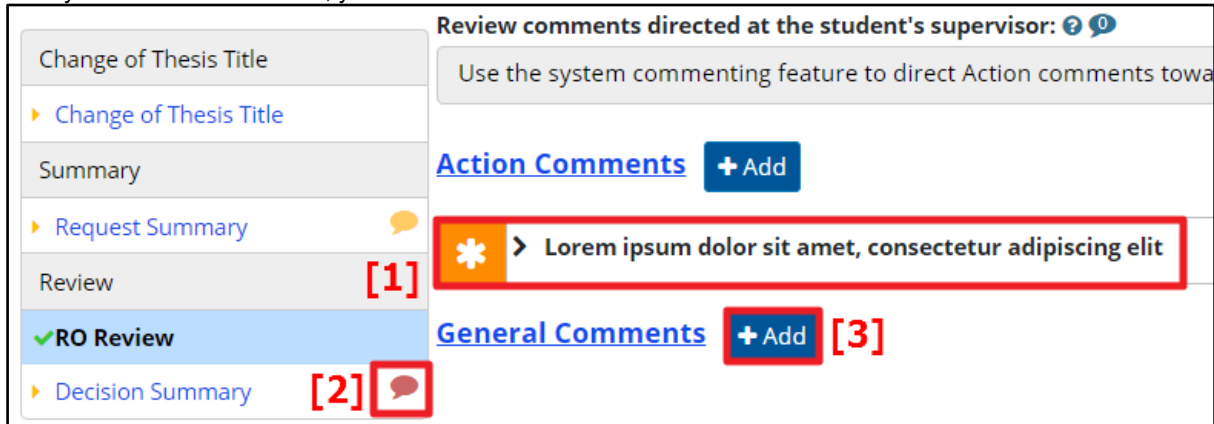
Click on the blue speech bubble icon [1]. An Action Comment requires a written response addressing the comment. To include one, click '+ Add' [2], include a subject [3] and any details [4], then click 'Post' [5]:
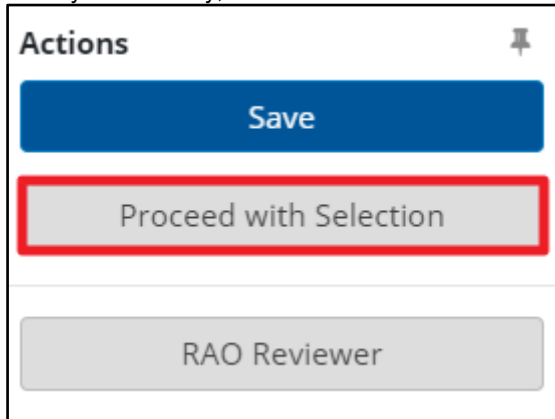
After you've made a comment, you will see:

Your comment is posted [1], and a red speech bubble icon appears against your review [2], indicating that there is an unaddressed Action Comment that requires a reply from the supervisor:

Note that you can also leave a General Comment [3], which may indicate further actions required but does not require a written reply.
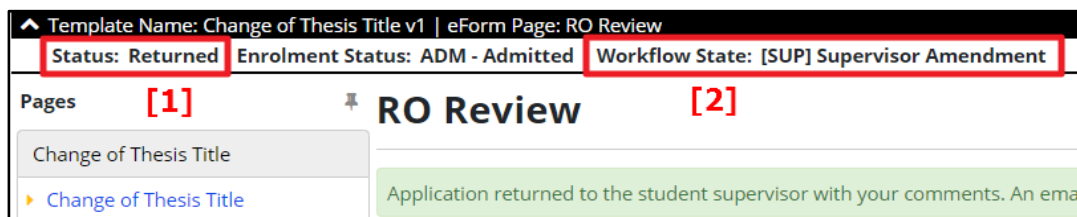
Once you are ready, choose 'Proceed with Selection' from the top right-hand corner:

Confirm your selection.

If Returned, you will see that the Status has changed, and the Workflow State will indicate it sits with the supervisor '[SUP] Supervisor Amendment' or '[STU] Student Amendment':

9. Reviewing Re-submitted Forms

If the student or supervisor has amended and the form returned the form to you, it will appear again as a form for RO Review:

Go to the RO Review page to see any responses to your Comments:

Scroll down and click on the blue speech bubble [1]. Expand any comments by clicking on the down arrows [2], and view the replies [3]. If you need any further communication with the student or supervisor, you can reply and Return it once more.

Note that the reply from the supervisor may indicate changes to their form, which you can view in the Decision Summary [2]. Once you are satisfied with the response, return to the RO Review page [1] and update your recommendation - either continue the process and send it on to the RAO, or send it back to the student or supervisor for further clarification.
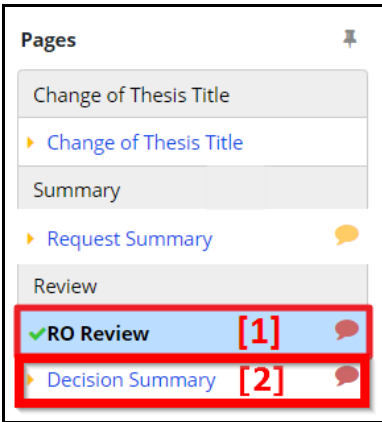
Once you have updated your RO Review, choose 'Proceed with Selection' from the top right-hand corner:
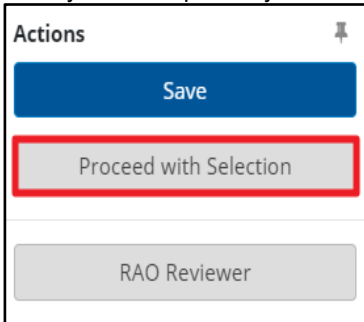
10. Revising Returned Forms

The RAO may send the form back for further clarification. In that instance, it will reappear in your HDR Forms for your action list with a Status of 'Returned' with the '[FACRO] RO Review' Workflow State:

To revise the form, click on any of the form fields.

Comments will be available from the RAO reviewer on the 'Decision Summary' page. Find the link on the left-hand Pages navigation menu:

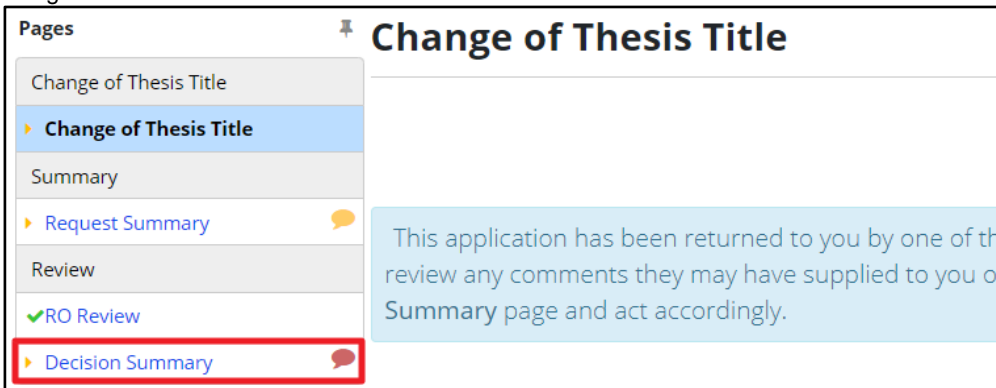Scroll down to the Research Officer summary section.

Click on the blue speech bubble icon [1] to view comments from the RAO. Note, this is in a separate field further down the page from any comments you left for the supervisor:
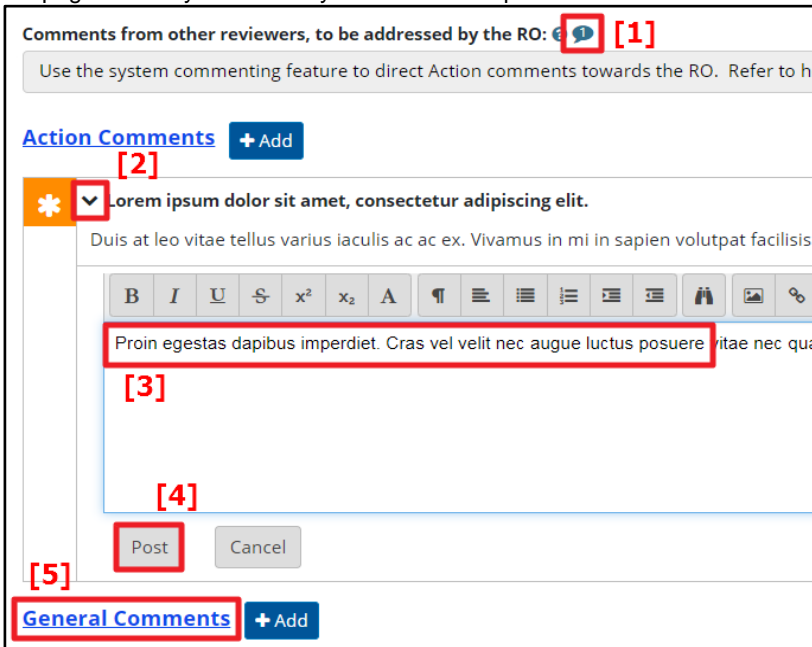
Expand the comments to view by clicking on the down arrow [2], enter your reply [3], and then Post [4]. Follow the same process for any comments under General Comments [5], though they do not require a reply.

If you need to change any details in your Review (eg. if you need to change the RAO due to a conflict of interest), go back to the RO Review to do so:
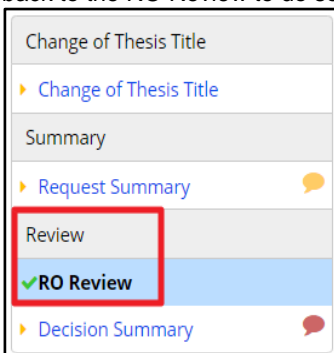
When you have addressed the comments and are ready to proceed, once again click 'Proceed with Selection'.

11. View History

Within any application, you can view the history of changes by clicking 'View History' on the 'Actions' menu. This will give you a snapshot of where the form has been and whom it is with currently.

By selecting an earlier "version" like "Student Submission – PS Unavailable" in the example below, you will be able to see any changes made to the form. It will compare with the current content and highlight what is different to the copy you selected. Any pages with changes will have a [edit icon] next to its name [1]. You will then see a [icon] next to the field that was edited [2].

12. Print out/Save a copy of a form

You might need or want to print out or save a copy of a particular application. You can do that from within the application by clicking on the 'Report' button [1]. In the pop-up window, chose PDF as the output Option [2] and select 'Application' from the 'Print View' [3] tab. Click OK and a pop-up window will open to select where to save the file and what to name it.
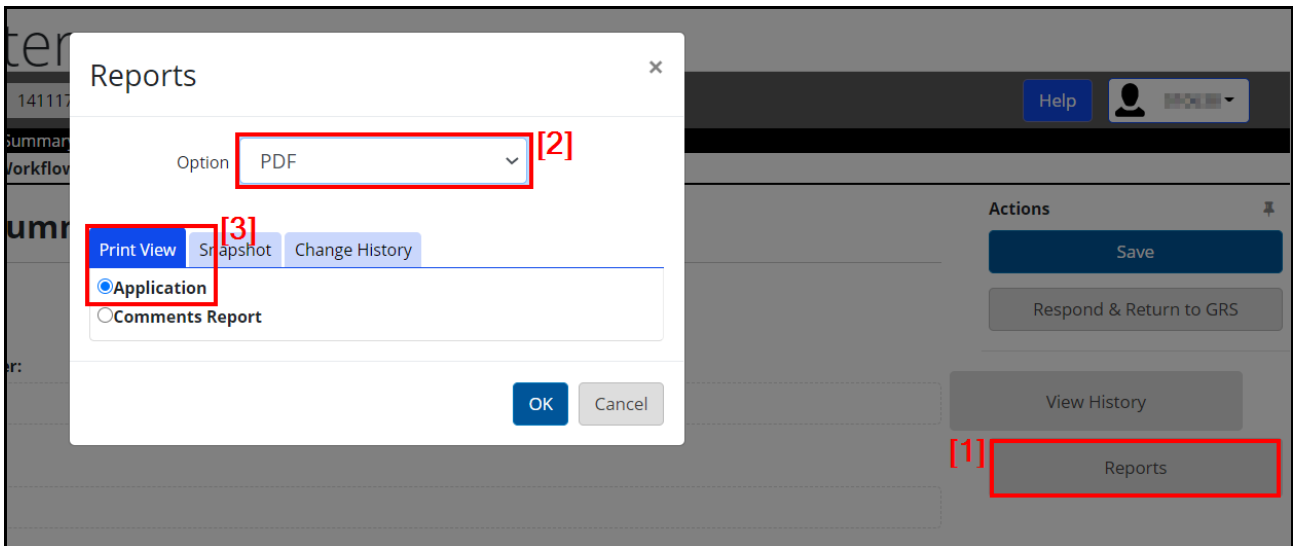
13. Search function

RM offers the option to search the databased based on specific criteria. A number of objects can be searched from including students and applications. To see what applications are currently being processed within your school/faculty, go to 'My Course Variations' [2] under 'My Candidature' [1] and select the 'Advance' [3] tab. Click on the 'Results' tab to see a list of all the active forms (from Draft to Processing) within the School/Faculty.

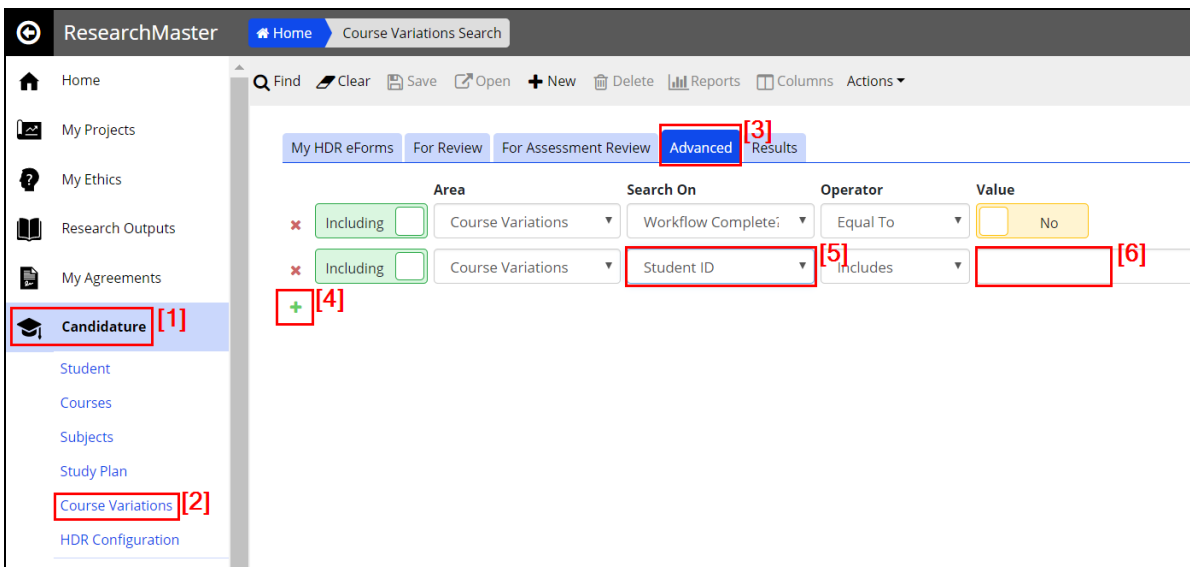To narrow the search down, you can add filters to suit your requirements. To see all processed forms (approved, declined & withdrawn), simply change the default value to "Yes" or change the 'Operator' to 'Exclude'.

To add more filter, click on the green **+** sign [4] to add additional criteria [5] (i.e. to search all forms under a specific Student ID [6]

or all student that have submitted a specific form as per below).

You can also search for any student within your school/faculty. Go to 'Students' [2] under 'My Candidature' [1] and enter their 'Name' [3] or 'Student ID' [4] and hit enter to see the results. If searching by name, be mindful that RM will expect an exact match, which means if your student has a middle initial or middle name, it would need to be included (i.e. George R,R, Martin). If you leave anything out, RM will not find your student. Sometimes it is safer to search with just the first or last name. You can also do an 'Advance' [5] search if your search criteria isn't one of the field on the 'Basic' tab.

Under the 'Advanced' tab you can search by supervisor for instance, which will give you a list of all the students supervised by this academic, whether as a Principal or Co-supervisor.
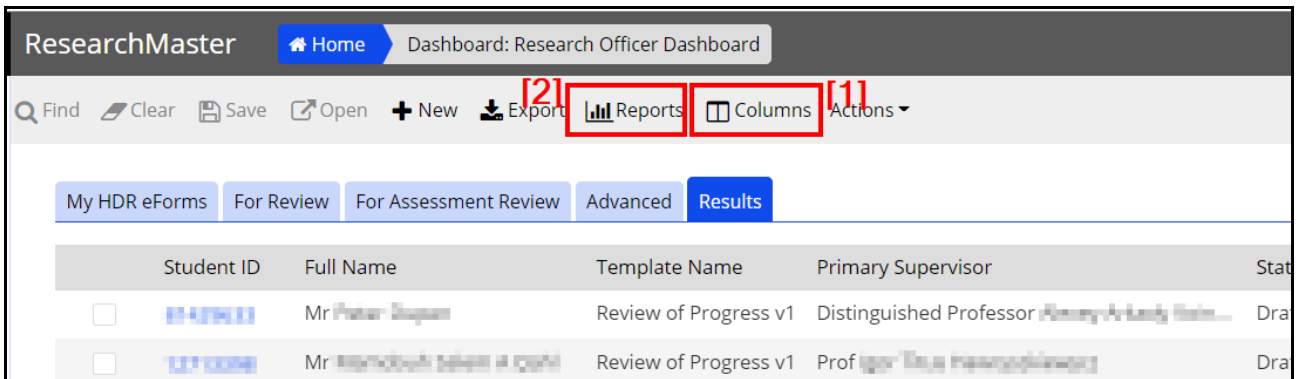

Or if you look after more than just one school, you can also search by org. unit

To run the search, you can either hit enter after typing in the criteria, click on the 'Results' tab or click the 'Find' button n the left in the top menu bar to get a list of forms or students.
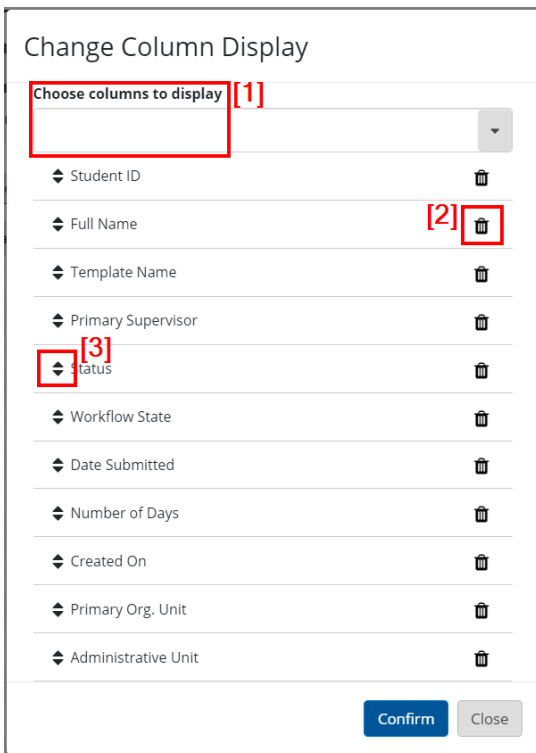
14. Export search results

Your search results can easily be exported into a CSV file. Once you have the list of applications or students you were after, start with choosing which columns you want to include/exclude [1] from your table. Click the export button [2]. This will open a pop-up so you can select where to save the file and what to name it.

You can manage the columns displayed on your search results by either adding [1], removing [2] or sorting the columns to your liking. To move them, click and hold the double-headed arrow in front of the column header and drag it where you want it to be.
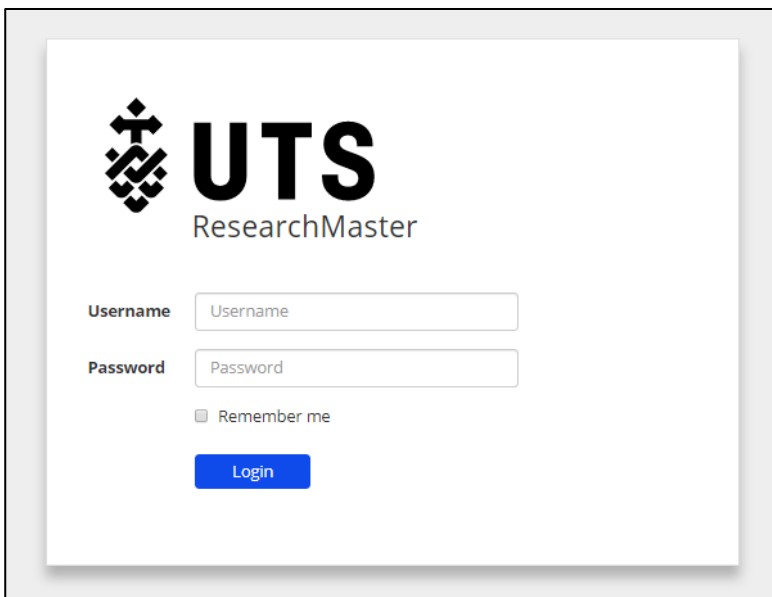
Responsible Academic Officer Interface

The Responsible Academic Officer (RAO) is the senior academic staff member within the faculty/school with the delegated responsibility to make various student-related academic decisions.

The faculty/school RAO decides whether to endorse the graduate research students' candidature variations or not, as required. When endorsed by the faculty/school, the candidature variations will be processed by the Graduate Research School (GRS).

1. Accessing HDR Online

We recommend Chrome or Firefox to log in to ResearchMaster (RM).

As the RAO, you can log into RM using your staff ID and password. If logging in remotely, go to https://vpn.uts.edu.au/my.policy and select ResearchMaster under 'Staff Resources'.

2. Responsible Academic Officer Dashboard

You can set up a Dashboard as your favourite. When logging in for the first time into RM, you might be asked to select your default dashboard.
To change it or set one up if you aren't asked the question, click on your staff ID [1] on the top right to open the session menu and chose the 'Manage Dashboards' option [2].

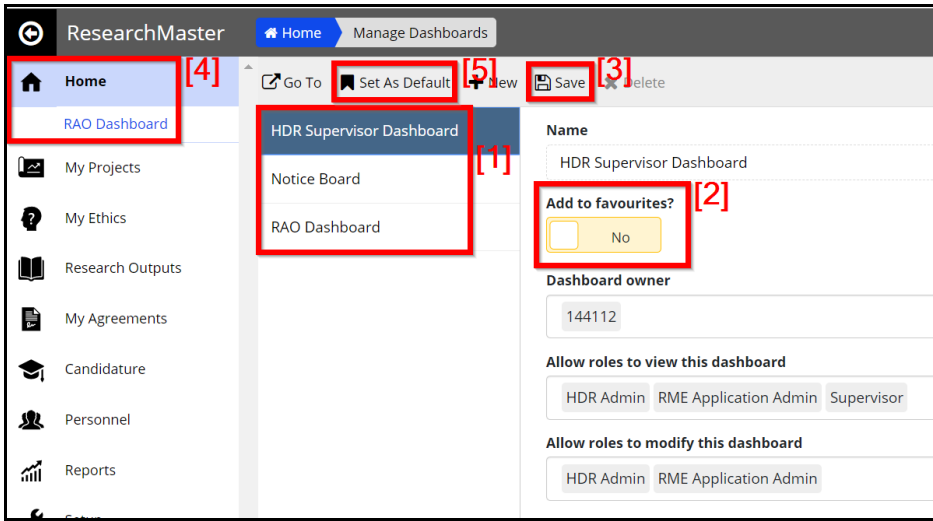If you have more than one dashboard to choose from, you can select the one you want to add [1] and make sure 'Yes' is set under 'Add to favourites' [2], then click 'Save' [3]. Any dashboards selected as favourites will then appear under the Home menu on the right [4].

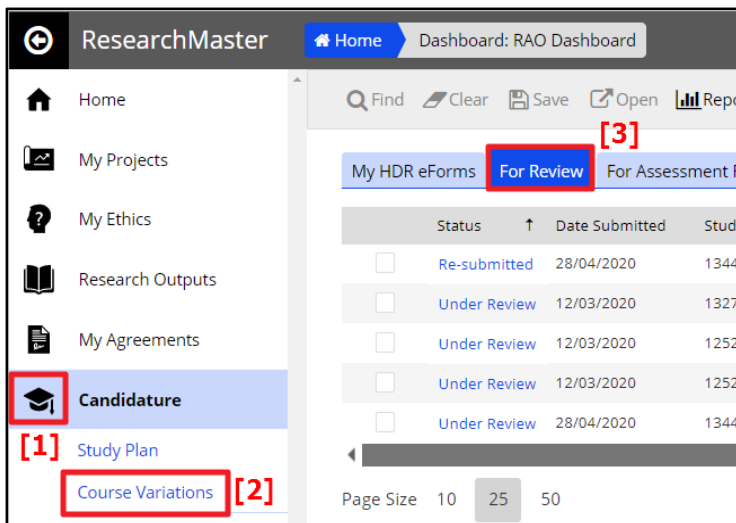By clicking on 'Set As Default' [5] the selected dashboard opens automatically on login.

3. Processing forms

A shortcut to "HDR Forms for your action" [1] should appear on the RAO Dashboard:
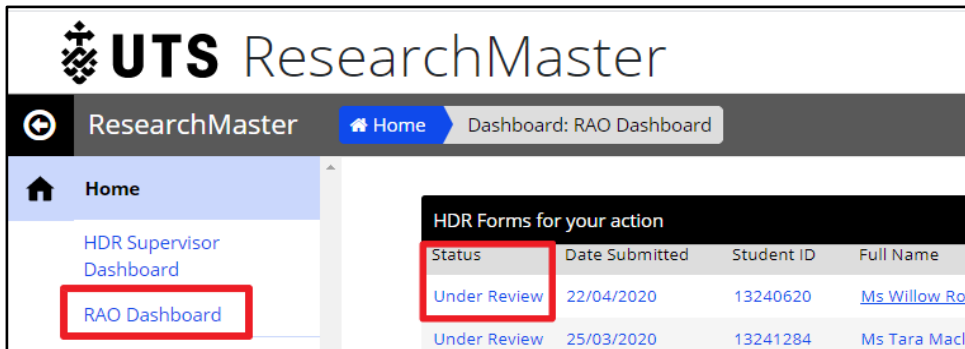
You can also access them any time from the Candidature > Course Variations page:
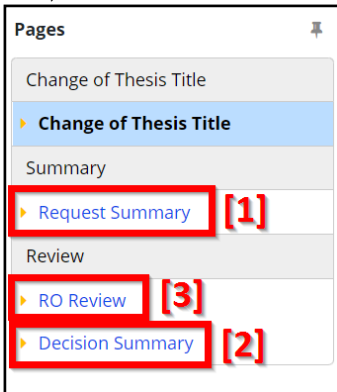
Forms requiring your attention will display a Workflow State of '[FACRAO] RAO Review:

Primary Supervisor	Workflow State	Number of Da ▲
Prof Rupert Giles	[FACRAO] RAO Revie...	1
Dr Jennifer Calendar	[FACRO] RO Review	30
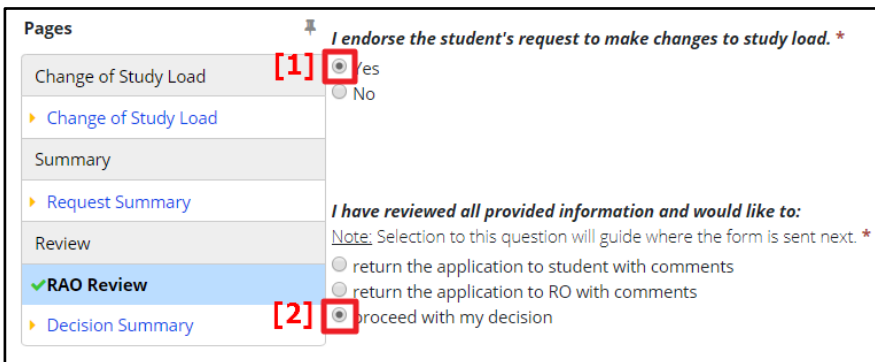
First, review the details on the Request Summary page [1]:

Pages

Change of Thesis Title
▸ **Change of Thesis Title**

Summary
▸ Request Summary **[1]**

Review
▸ RO Review **[3]**
▸ Decision Summary **[2]**

Once you have reviewed and made your decision, head to the RAO Review page [2] to make your decision.
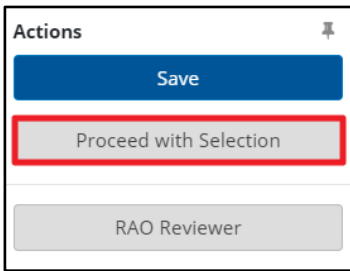
4. Recording Your Decision

To approve the student's request:

Pages

Change of Study Load
▸ Change of Study Load

Summary
▸ Request Summary

Review
✓RAO Review
▸ Decision Summary

I endorse the student's request to make changes to study load. *
[1] ● Yes
○ No

I have reviewed all provided information and would like to:
<u>Note:</u> Selection to this question will guide where the form is sent next. *
○ return the application to student with comments
○ return the application to RO with comments
[2] ● proceed with my decision

Endorse the request [1], then choose 'proceed with my decision' [2]
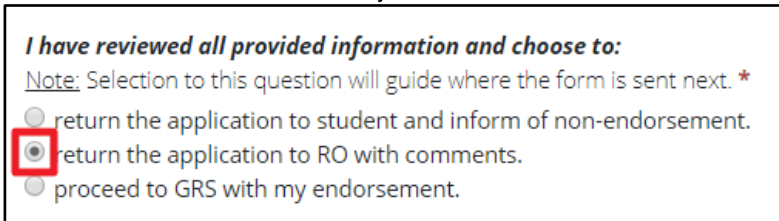
Finally, select 'Proceed with Selection' from the top-right hand corner, and confirm:
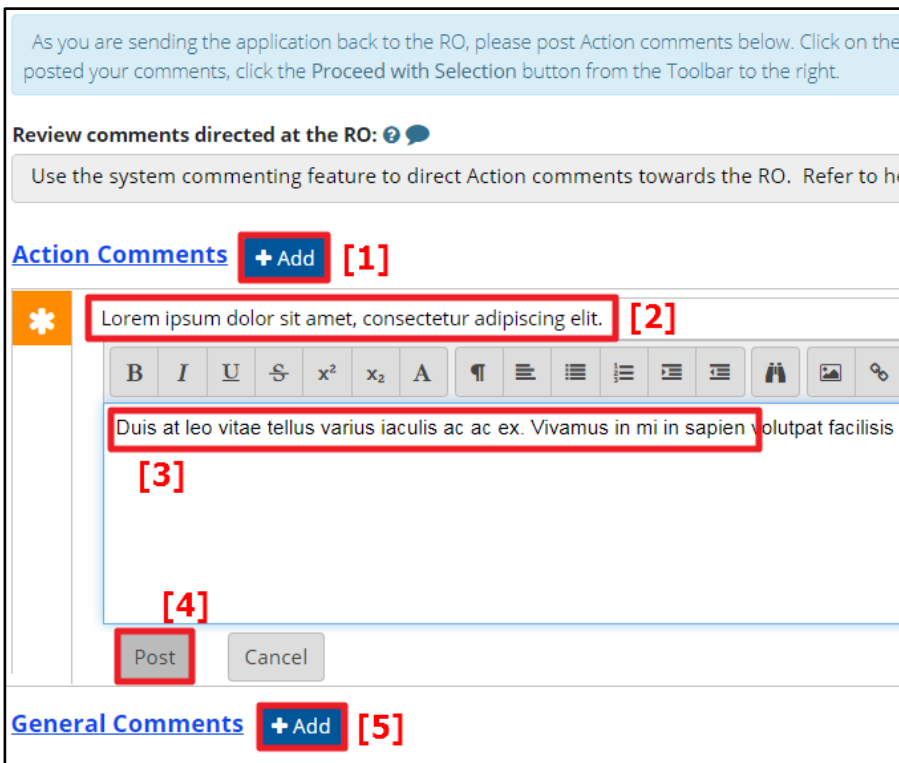

If the form requires additional information before it proceeds, you can return it to the RO for clarification, who can send it back down the line where necessary:

When you do so, you are required to leave a comment with further instructions. To leave an Action Comment, which requires an explicit comment reply:

Click on +Add [1], write your summary [2] and details [3], then 'Post' [4]. You can also leave a General Comment [5], which does not require an explicit comment reply.

You may also leave a comment for administration purposes:

RAO comments:

Proin egestas dapibus imperdiet. Cras vel velit nec augue luctus posuere vitae nec quam. Nam felis eros, ultrices quis ex ac, varius fermentum tellus.

Once you are ready, select Proceed with Selection from the top-right corner, and confirm:

Actions

Save

Proceed with Selection

RAO Reviewer

To reject the application:
Returning the application to the student will completely close the form - if the student wishes to resubmit with amendments, they will have to start a new form. If you need to reject the application, be sure to provide a reason to the student:

I have reviewed all provided information and choose to:
Note: Selection to this question will guide where the form is sent next. *
- return the application to student and inform of non-endorsement.
- return the application to RO with comments.
- proceed to GRS with my endorsement.

As you are sending the application back to the student informing them of non-endorsement, please post your comments below.

Final comments for Student about the outcome of this request:
Note: This field will be visible to the student once request outcome has been finalised. *

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis at leo vitae tellus varius iaculis ac ac ex. Vivamus in mi in sapien volutpat facilisis rutrum at risus. Mauris at molestie urna.

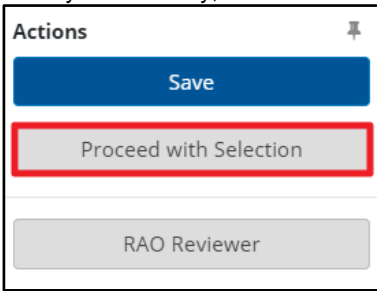You may also leave a comment for administration purposes:

RAO comments:

Proin egestas dapibus imperdiet. Cras vel velit nec augue luctus posuere vitae nec quam. Nam felis eros, ultrices quis ex ac, varius fermentum tellus.
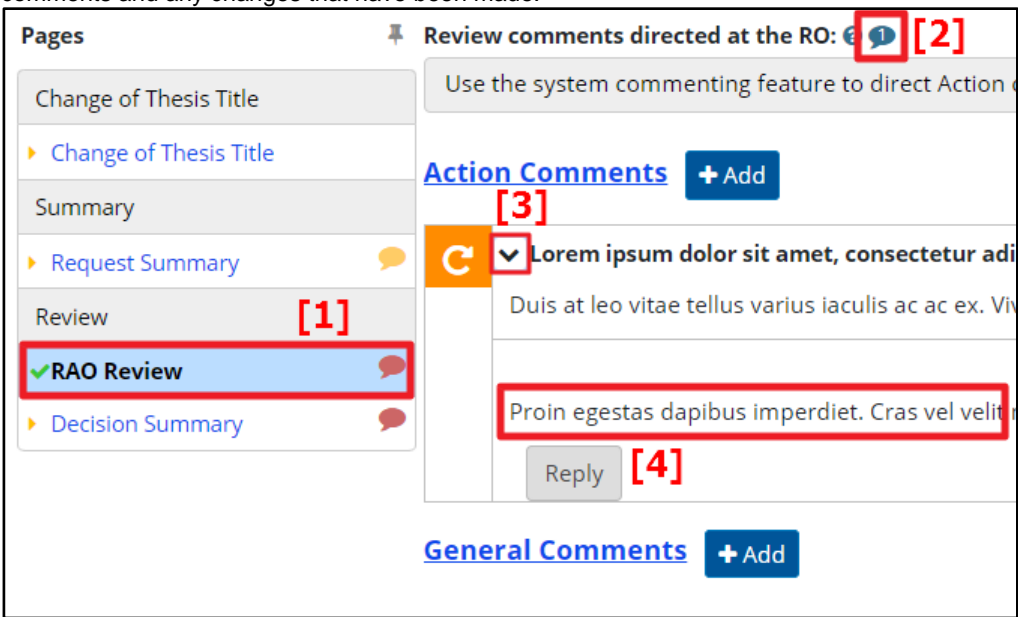
Once you are ready, select Proceed with Selection from the top-right corner, and confirm:


5. Review a Re-submitted Form

If you have sent the form back for clarification, and it has come back to you for approval, review the responses to your comments and any changes that have been made:

You'll find any comment responses on the RAO Review page [1]. Scroll down to the section titled "Review comments directed at the RO" and click on the blue speech bubble icon [2] to view comments. Click on the down arrow [3] to expand and view the response [4].

Note that you may need to go back to the 'Request Summary' page to see additional changes:
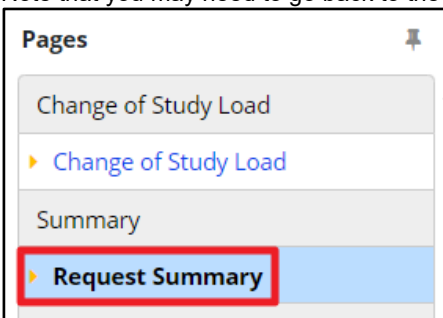
Finally, return again to the RAO Review page to make your revised decision.