PhD Manager

Postgraduate Research Management

PhD Manager streamlines the administration of graduate schools by replacing manually intensive paper-based processes with an easy-to-use online solution, improving efficiency and transparency.

By keeping information in one place, PhD Manager improves the visibility of all aspects of the graduate school. It enables projects requiring additional support to be identified and engagement by postgraduate researchers with visas to be monitored.

PhD Manager has a proven track record. 100% of Graduate School Managers using PhD Manager would recommend it, and 80% have already recommended it to another institution.

"PhD Manager is accessible, reliable, fresh, integral"
University of Northampton

"PhD Manager is efficient, transparent, supportive and clear"
University of Westminster

Supervision

Supervision	Supervisory teams are recorded within PhD Manager, and changes to established supervision teams can be requested by an existing supervisor. Once approved, the supervisory team record is updated automatically.
	Supervisors can see the current progress of the postgraduate researchers they supervise, including key details such as start date, mode, and submission deadline. They can also see the number of supervision meetings held, read notes of what was discussed and see agreed action points.
Supervision meetings	Either the PGR or the supervisor can log a supervision meeting in PhD Manager. Logging a future meeting enables the PGR to share files and notes with their supervisor in advance, and notes can be added by the PGR and supervisor following the meeting.
	The PGR and supervisor are prompted to review the meeting notes, which are ultimately signed off by the supervisor.
	Once they are logged within the system, all notes and files are searchable by PGRs, supervisors and administrators.
	Using PhD Manager's dashboards, administrators can monitor each PGR's performance according to the frequency of supervisory meetings.
Supervision and examiner experience	A record of PGR supervision experience is compiled automatically for each supervisor.
	Supervisors can also add any supervision and examiner experience gained externally to their personal record.
	Dashboards display the supervision experience for every supervisor clearly, making it easier to construct new supervisory teams that comply with institutional requirements.

Key milestones and processes

Calculating key dates	PhD Manager's project dates calculation engine calculates PGR submission deadlines and other key dates. Deadlines are automatically recalculated upon approval of changes to mode or suspensions.
Progression monitoring	Progression reviews can be organised within PhD Manager, and progress reports can be submitted by PGRs. The reports can then be reviewed and decided upon by supervisors. Progress review forms and workflows can be customised to suit different programmes and users.
Examination	PhD Manager calculates and reminds PGRs of their upcoming submission deadline. Supervisors are reminded to nominate examiners for approval a few months before the submission date. PGRs can submit their thesis online, which is then circulated to examiners. Pre and post-viva examiner reports can be submitted online. Conferment and final thesis deposition are efficiently managed through PhD Manager.
Change requests	PGRs can use PhD Manager to submit change request applications such as suspension, extension and change of mode. After forwarding the application to the appropriate reviewer and approver, the system notifies PGRs and supervisors of the outcome, and recalculates key project milestones if required.
Online forms	PhD Manager uses online forms to streamline completion and submission of forms across all processes. Forms can be customised to display different text to different types of user. Template forms can be created for users from different departments, on different modes, or registered for different awards. By guiding users to exactly what information needs to be entered, PhD Manager's carefully designed online forms and workflows lead to an improved quality of applications overall.
Attaching files	Documents of any format and size – including whole theses – can be attached to PhD Manager's online forms. Where the file is in a common file format (including images, Microsoft Office and PDF) it can be previewed in the browser, and the full text can be extracted for searching.
Version control	Forms can be returned to applicants for them to edit and resubmit. Previous versions of forms are stored and any changes between versions are clearly highlighted.
Submission notifications	Once a form is submitted through PhD Manager, users are notified by email. Automatic email notifications are also sent to PGRs and supervisors at key points throughout a workflow – from initiation to completion.
Approvals	Approvers are notified to review a form once it has been submitted. Workflow routes can be customised to reflect an institution's processes. This enables the system to determine which are the appropriate approvers and committees for each form. Once a form is submitted, reviewers and approvers are each notified by email, and each will be assigned a task on their Haplo task list. Weekly reminder emails are automatically sent to users listing any outstanding tasks.

Key milestones and processes

Task delegation	If members of staff are absent or unavailable, the task can be delegated to another supervisor or approver.
	The original supervisor or approver can reassign the task to themselves when they return.
Disability support	PGRs with recognised disabilities (as defined by each institution) can be flagged within PhD Manager at key academic stages, allowing reasonable adjustments and legal obligations to be met more easily.
Committee meetings	Committee secretaries can review applications sent to the committee. They can then return the application for more information, submit it for discussion by the committee, or forward it to the committee chair.
	Applications can be scheduled for discussion at an upcoming committee meeting, or can be discussed via an online discussion between committee members.
	Once a meeting is scheduled, an agenda listing all the applications to be discussed is automatically generated by the system, then sent to all committee members one week before the meeting date.

Training and development

Training needs analysis	PhD Manager's training needs analysis tool prompts PGRs to reflect on their current and desired level of expertise against a series of key skills.
	PGRs can update their training needs analysis at any time and share it with supervisors.
Training plan	PGRs can share training plans with their supervisors and mark when training objectives have been completed.
Event management	Training facilitators can organise and publicise training and development events within PhD Manager. PGRs receive email invitations and can reserve their place online.
	Registers of attendance can be printed and administrators can confirm the attendance of each PGR.
	Waiting lists are managed within the system, and certificates of attendance can be generated automatically.
Development record	PGRs can create a record of all training and development they have undertaken within PhD Manager. Their attendance at university training and development events is logged automatically.

Reporting

Reports	PhD Manager can produce reports at PGR, supervisor, department and university level, including:
	• Directories of postgraduates researchers
	• Status reports for key processes affecting all postgraduate researchers, such as progression reviews
	• PGR attendance at training and development events
	• PGR funding reports

Filter and export results	Reports can be filtered according to a variety of criteria such as: start/end date, status, faculty, department, name, and academic year.
	Reports can be exported using Excel.
Permissions	Fine-grained permissions can be set to control access to reporting.
	Reporting permissions may be confined to a subset of the data – for example, users may have their viewing permissions restricted to data concerning PGRs in their department.
	Dashboard permissions can also be adjusted for colleagues beyond the graduate school, such as those responsible for visa compliance.
Appeals and complaints	Because PhD Manager can be adjusted to reflect institutional regulations and processes, there is less scope for users to make errors.
	With records kept in one place, it's quicker for those investigating appeals and complaints to retrieve all of the relevant information, rather than pull it from multiple sources.
	If there are concerns about an application, a full audit showing all reviewers' comments and decisions can be generated with a few clicks of a mouse.
Visa monitoring	PhD Manager records and tracks evidence to support UKVI compliance.
	PGRs with visas are displayed on a visa monitoring dashboard which displays the date of last engagement, highlighting where PGRs have not been active for a certain time.
	Engagement means attendance at a supervision meeting, university training course or conference event. It also includes submission of key academic stage applications, attendance at transfer or examination vivas, or whatever key monitoring points an institution uses.
External examiner 'right to work' checks	Administrators can add passport and 'right to work' checks for external examiners to an examiner's record within PhD Manager, this includes the ability to upload relevant files.
	Administrators can be prompted to check 'right to work' as part of the examination workflow.
	The status of external examiner 'right to work' checks can be displayed on external examiner dashboards.

Impact of PhD Manager

Before using PhD Manager, graduate schools described their processes as time consuming, manual, and slow; difficult to track; and reliant on frequently out of date information. Event management was often labeled 'time consuming', involving multiple steps within several different systems or spreadsheets. Tracking the workflow of documents was slow and clunky, and often based on circulating Word documents by email.

After implementing PhD Manager, graduate schools have reported more streamlined and time-efficient processes, greater visibility, and availability of up-to-date information. PhD Manager offers significant benefits to everyone involved in supporting postgraduate research at an institution.

How have graduate school managers and administrators benefited from PhD Manager?

80% of graduate school managers using PhD Manager said using the system has positively changed their role in supporting postgraduate researchers.

Instead of answering questions about regulations and processes (which are now clearly displayed within PhD Manager) they are able to spend time supporting postgraduate researchers and adding value as they develop other areas of their postgraduate research programme.

Some of the major benefits of PhD Manager to graduate school managers and administrators:

- It has massively reduced the time managers spend on purely administrative tasks.

- Preparing for a committee takes as little as one hour, where before it often took half a day.

- It has dramatically cut email traffic caused by applications and processual queries, lightening the burden on Managers and committee members.

- The platform enables shared access to records which are updated in real time. Information is easily accessible to everyone, which has eliminated many unnecessary queries – everyone in the institution can see the same information.

- The relaying of outcomes to postgraduate researchers and supervisors is automated. Managers no longer need send notifications by email, saving significant time as the system notifies all relevant stakeholders simultaneously.

- Tier 4 Attendance Monitoring can be based in real time and does not require chasing.

- Managers can see exactly where an application is without having to chase people.

- Applications no longer get "lost", and accountability is clearly visible at each stage.

- Event management has been streamlined, which benefits managers, administrators and postgraduate researchers. The administration of workshops and skills development records are seamlessly integrated into the student's administrative path through PhD Manager. Everything's in one place.

- Having a clearer system has allowed Managers to improve annual progress reviews, which has subsequently improved the quality of their research degree provision, PRES results and completion rates.

- While the system takes care of regulations and processes, Managers can spend more time supporting postgraduate researchers and developing other areas of their academic programme, such as improved disability support.

How have postgraduate researchers benefited from PhD Manager?

Instead of downloading different forms from different systems, introducing PhD Manager has enabled postgraduate researchers to access everything they need within a single system.

Postgraduate researchers can access information whenever they want, since PhD Manager is accessible via any internet-enabled device (both inside and outside of the institution).

PhD Manager has led to a general reduction of paper and has removed the need for gathering actual signatures, which has been extremely well received by postgraduate researchers.

Some of the major benefits for postgraduate researchers have been:

• Information is made available to postgraduate researchers in one place, and they can access it anywhere.

• All the key documents are attached to the relevant process within the system. The online forms are much easier to complete than paper-based forms, and it's much easier to get them approved online than in person.

• Processes and regulations are much clearer.

• Applications are processed and approved quicker.

• Feedback and annual progress review processes have greatly improved and are now far simpler.

How have supervisors benefited from PhD Manager?

The overarching benefit for supervisors using PhD Manager is the increased visibility of information about their postgraduate researchers and their supervisory histories.

Supervisors can easily record their supervision meetings within the system, and it provides them with a central place to store records from the meeting. These can be shared with the entire supervisory team.

This information is kept within the supervisory dashboards and all the available data is displayed in real-time.

As with postgraduate researchers, the fact that PhD Manager provides clear processes and clarity on regulations saves Supervisors time. The system walks them through the Regulations as they use it, meaning they are more confident in supporting postgraduate researchers and require less support from graduate schools.

Some of the major benefits to supervisors have been:

• Increased visibility of information about their postgraduate researchers and supervisory histories.

• Clearer processes and regulations.

• Easier form-filling and less paperwork, making it easier to keep on top of tasks.

• Easy access to their records from any location meaning applications can be progressed while they are not on site.

• Easier, more detailed record-keeping, which provides critical information when dealing with difficult supervision issues.

How have postgraduate research coordinators benefited from PhD Manager?

Through the extensive data available in PhD Manager, postgraduate research coordinators now have a greater oversight of progression within the graduate school. They can easily see larger trends within the graduate school as well as more granular information, like specific postgraduate researchers who keep missing deadlines.

PhD Manager's records can be accessed whenever they want and wherever they are, which is important for faculty postgraduate research coordinators who are often away from their desks.

Some of the major benefits to postgraduate research coordinators have been:

• Real-time process tracking, allowing easier oversight of postgraduate researcher progression status.

• Intuitive dashboards and user-interface, enabling easier workflow management.

• More streamlined processes, saving time and cutting back on email traffic.

• Access to information whenever they want, without having to ask the Graduate School Registry.

• Easier management of staff allocation for supervision, assessment and examination.

• More comprehensive and detailed record-keeping, which provides critical information when dealing with appeals and complaints.

How have training and development managers benefited from PhD Manager?

PhD Manager's training events functionality is extremely popular with training and development managers, who describe it as being "seamlessly integrated" with the student's administrative path through PhD Manager.

The functionality enables authorised training organisers to publish details of upcoming events, which postgraduate researchers can then view and book. Alerts, reminders and emails are then sent for upcoming events.

Some of the major benefits to training and development managers have been:

• The Training Needs Analysis tool, which enables PGRs to work more fluidly with supervisors by reviewing and monitoring their own training and development needs, reducing the workload for training and development managers

• Real-time tracking of shared PGR training plans, enabling managers to assess progress and development.

• Automatic logging of PGR development records and attendance at university-organised training events.

PhD Manager Case study

University of Westminster

The challenge

Supporting several hundred postgraduate researchers across five campuses in central London, the University of Westminster Graduate School was keen to improve the postgraduate research experience and cut the programme's administrative overhead.

A confusing patchwork of spreadsheets, paper forms, Word documents and PDFs had led to inefficiencies and unreliable information. Paper and email-based applications only worsened the situation, preventing processes from being as transparent as they should be; and the constant stream of examinations, thesis submissions and performance monitoring reviews was overwhelming.

The Graduate School was keen to move to a single, comprehensive information management platform, and implement streamlined online forms to help them administer this complex set of processes and improve the student experience.

Professor Joss, Graduate School Director explains, "what's most important to me is ensuring that each postgraduate researcher is receiving effective support" and that they have "the best chance of a timely and successful completion."

The solution

The Graduate School selected PhD Manager due to its comprehensive functionality, configurable architecture and intuitive user experience.

Haplo worked closely with the Graduate School to understand their processes, and reflect their terminology, workflows, and forms in PhD Manager.

Within a year, the Graduate School were seeing the impact of the system:

"Our completion rates have risen significantly over the past year, and PhD Manager has played a key part in enabling that success." – Professor Simon Joss, Graduate School Director

Streamlined processes

PhD Manager's forms and workflows are all generated online, meaning postgraduate researchers and supervisors no longer have to navigate a complex network of word forms and processes.

Postgraduate researchers and their supervisors use PhD Manager for recording logs of supervision meetings throughout the year. The Graduate School benefits from integrated functionality to publicise and administer their extensive training and development programme.

More transparency

Graduate School administrators are no longer the sole keepers of critical information, and no longer need to spend time answering requests for basic information. As everybody has access to the same information, postgraduate researchers, supervisors, and faculty coordinators have direct access to the information they need, whenever and wherever they need it.

The reduced administrative burden has enabled postgraduate researchers and their supervisors to spend more time progressing their research, has improved the student experience and provides a more professional service to postgraduate researchers.