

# Research Student Lifecycle Reports – User Guide

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## 1.1 Introduction

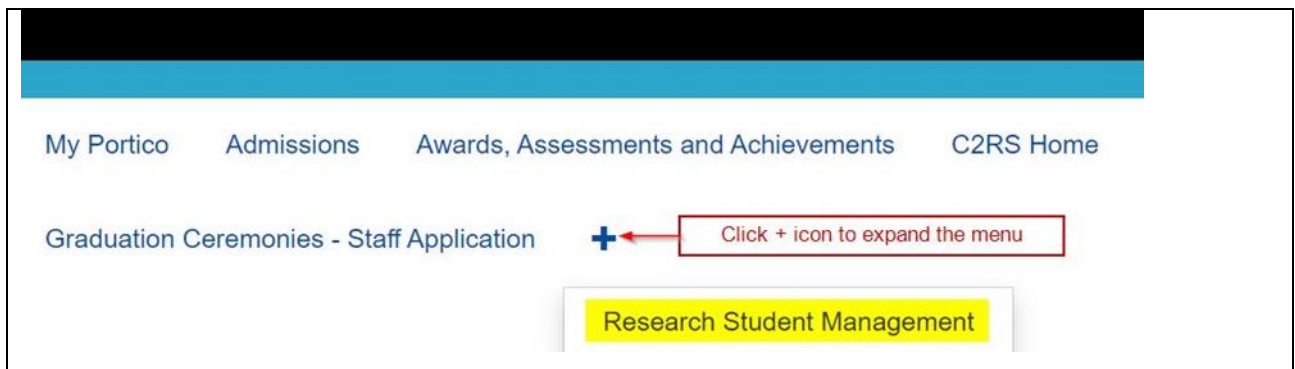
We have developed a series of reports designed to give specific stakeholders access to information about research degree students.

One of the advantages of these new reports is the ability to incorporate certain functionality from Portico (for example, logging the MPhil-PhD Upgrade), which differs from the student view report currently available.

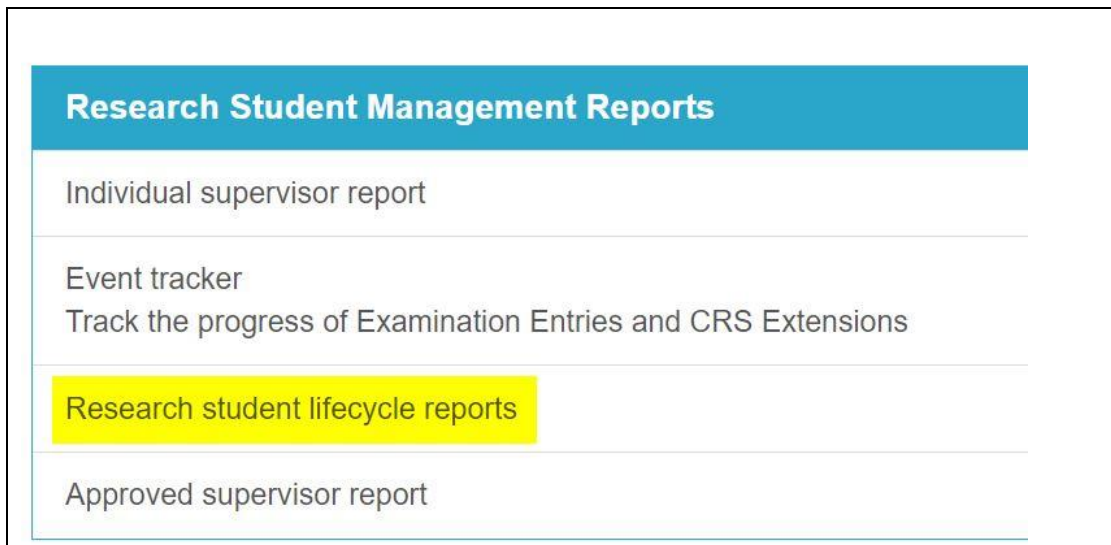
We have included a range of reports along with the ability to see all the information for a single student.

## 1.2 How to Access Reports

1. Log into Portico
2. The link to the Research Student Management container can be found on the top-level navigation bar. If the link is not immediately obvious click the + icon and the menu will expand:



3. The lifecycle reports can be found on the right-hand side of the Research Student Management screen:



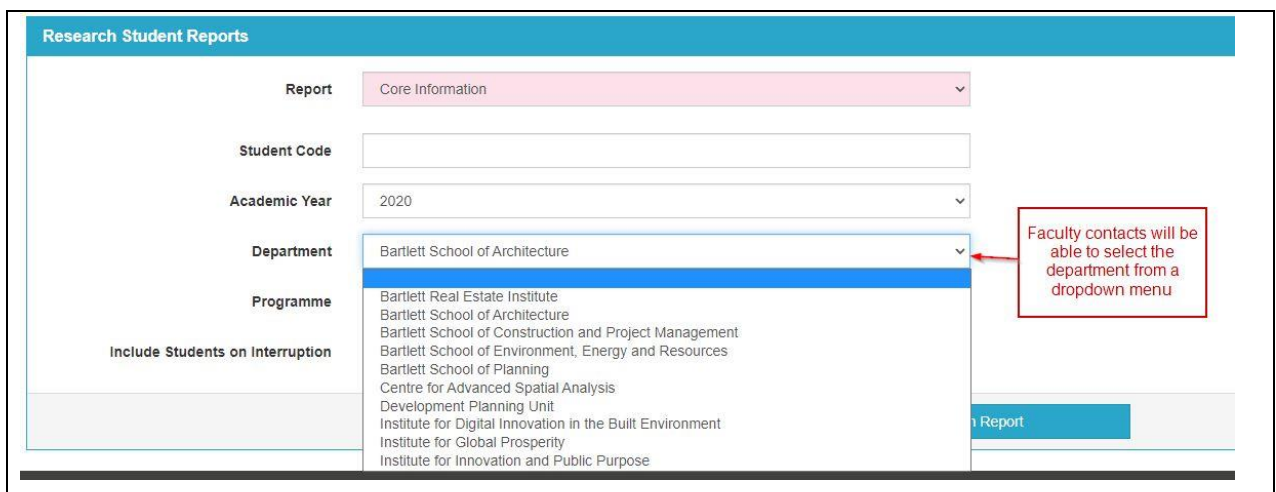
## 1.3 Landing Page

1. When you open the task, you will be taken to the following screen, depending on your role:

**Faculty Administrators and Faculty Graduate Tutors** will see the reports default to their own faculty and will have a dropdown menu for each department.

**NB.** There is too much data to enable all the students for a single faculty to be listed in one report.


You will need to narrow your search criteria by first selecting the department:



You can then search by programme, which will be ordered by department:

The screenshot shows a search interface with the following elements:

- Department:** A dropdown menu set to "Gatsby Computational Neuroscience Unit".
- Programme:** A dropdown menu with the text "Please choose Programme or leave blank for all". Below it is a search input field with a magnifying glass icon.
- Include Students on Interruption:** A checkbox that is currently unchecked.
- Programme List:** A list of programmes is displayed, ordered by department. The first item is "Gatsby Computational Neuroscience Unit", which is highlighted. Below it are two items: "Research Degree: Gatsby Computational Neuroscience Unit" and "Research Degree: Gatsby Computational Neuroscience Unit 4 Year".
- Annotations:** A red box with an arrow pointing to the programme list contains the text "Programmes will be listed by department".

 **Tip:** You can search just using the programme code.

**Departmental Administrators and Departmental Graduate Tutors** will see the reports default to their own department.

The screenshot shows a search interface with the following elements:

- Department:** A dropdown menu set to "Institute of Archaeology".
- Programme:** A dropdown menu with the text "Please choose Programme or leave blank for all". Below it is a search input field with a magnifying glass icon.
- Include Students on Interruption:** A checkbox that is currently unchecked.
- Programme List:** A list of programmes is displayed, filtered by the selected department. The first item is "Institute of Archaeology", which is highlighted. Below it are two items: "Research Degree: Institute of Archaeology" and "Visiting Research: Archaeology".
- Annotations:** Two red boxes with arrows pointing to the department and programme dropdowns contain the text "This will default to your own department" and "You will only be able to access programmes from your department" respectively.

You will receive an error message if the department chosen contains a large number of students.

The screenshot shows an error message in a red box at the top of the search interface:

**ERROR**

This search criteria will return too many students. Please choose a Programme from the list below and search again.


Below the error message, the search interface is shown with the following elements:

- View user guide here:** A link to the user guide.
- Report:** A dropdown menu set to "Core Information".
- Student Code:** An empty text input field.
- Academic Year:** A dropdown menu set to "2020".
- Department:** A dropdown menu set to "Division of Psychology and Language Sciences".
- Programme:** A dropdown menu with the text "Please choose Programme or leave blank for all".
- Annotations:** Two red boxes with arrows pointing to the error message and the programme dropdown contain the text "Large departments may find that Portico will not list all their students at the same time." and "In this situation you should select the programme from the dropdown menu." respectively.

To narrow down your search you can include the Programme details:

The screenshot shows a search form with the following fields and options:

- Department:** A dropdown menu currently showing "Division of Psychology and Language Sciences".
- Programme:** A dropdown menu with the text "Please choose Programme or leave blank for all". Below it is a search input field with a magnifying glass icon. A list of programmes is displayed below the search field:
  - Division of Psychology and Language Sciences
  - DCLinPsy Clinical Psychology
  - DEdPsy Educational Psychology
  - DEdPsy Educational and Child Psychology
- Students on Interruption:** A checkbox field.

 **Tip:** You can search just using the programme code.

2. The Report field will allow you choose which report you wish to view:

The screenshot shows a dropdown menu for the "Report" field. The menu is open, showing a list of report types. A red callout box with an arrow points to the list, containing the text "Choose the report from this list".

Report
Core Information
Core Information
MPhil-PhD Upgrade
Exam Entry and Submission Information
Examiner Information
Viva Information
Final Submission / Award Information
Interruptions
Information for Single Student

3. Select the academic year that you wish to view.

The screenshot shows a dropdown menu for the "Academic Year" field. The menu is open, showing a list of years from 2016 to 2021. The year 2021 is currently selected and highlighted in blue.

Academic Year
2021
2021
2020
2019
2018
2017
2016

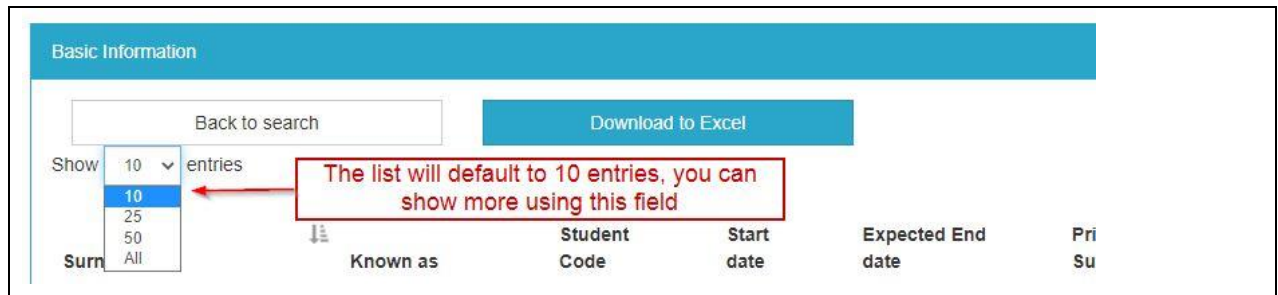
4. To include students on interruption, tick this box:

The screenshot shows a checkbox labeled "Include Students on Interruption". The checkbox is checked, indicated by a blue checkmark. A red callout box with an arrow points to the checkbox, containing the text "Tick box to include interrupting students".

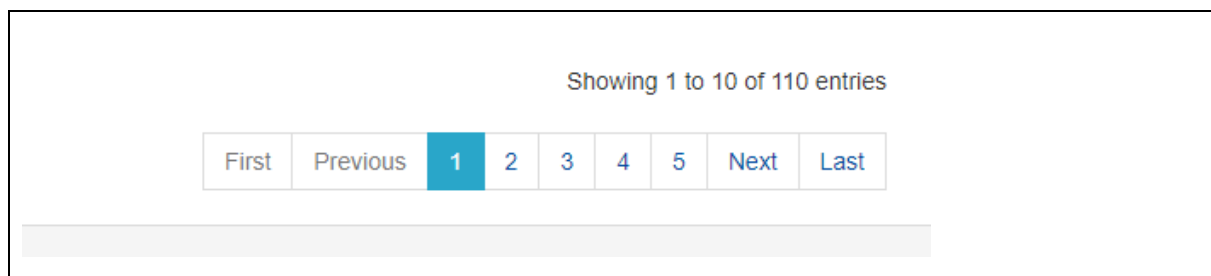
**NB:** This tick box is not required when accessing the Interruption report.

## 1.4 Items Common to all Reports

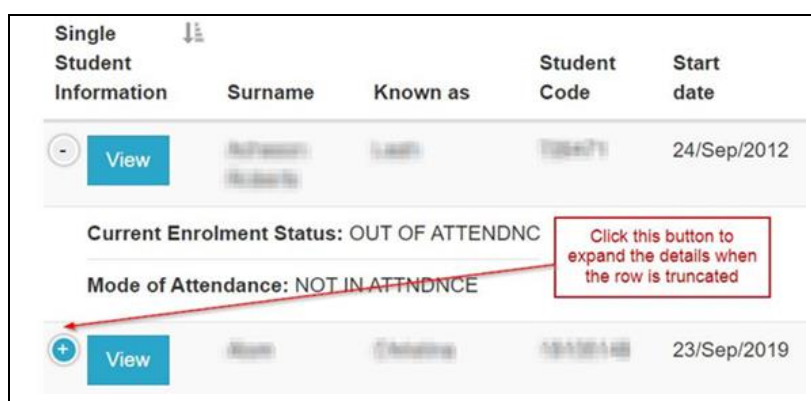
1. The reports will default to 10 entries when opening each page. To expand the listing use the dropdown menu shown below:



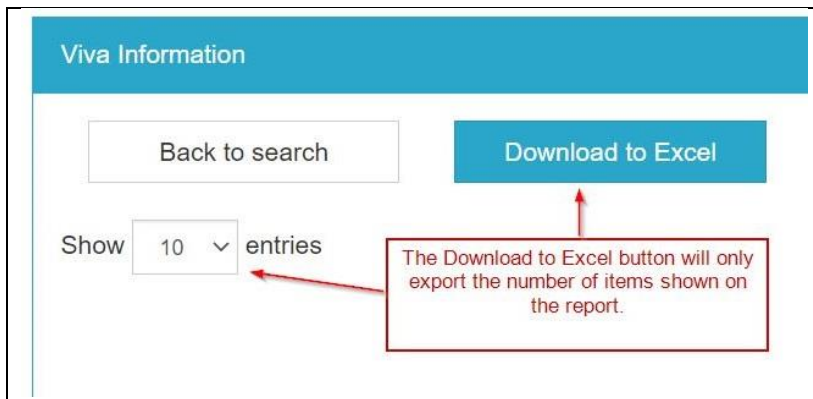
The bottom of the screen will show the number of pages, depending on the number of entries selected above.




2. You may find that not all the information is shown on the same line (especially if you are using a small screen). In this situation simply click the 'Plus' button on the left-hand side of the screen and the additional information will show:



- Each report will have the facility to download the information to Excel, data will be exported in the .csv format:



The 'Download to Excel' button will only export the data that is listed on your page. To export all students, you must adjust the 'Show entries' list to show all entries.

 **Tip:** By using the Search function you can manipulate the data you export.

- The reports default by the Surname field in alphabetical order, but you can re-order the listing by clicking on any of the individual headings, this will show a pair of arrows to indicate the primary search item (highlighted):

Click the heading to order the listing, highlighted

Start date	Expected End date
24/Sep/2007	15/Sep/2021
27/Sep/2010	30/Jun/2023
26/Sep/2011	15/Sep/2021

5. Alternatively, you can search for individual students from the Programme List using the Search Box (highlighted):

Search: <input type="text"/>	
<b>Current Enrolment Status</b>	<b>Mode of Attendance</b>
ENROLLED	FT CRS
ENROLLED	FULL-TIME

The search function will accept information from within the report that you are viewing. For example:

Surname

First name

Student number


Supervisor code


Start Date (dd/mmm/yyyy format only)

Award Level

Mode of Attendance

If you enter information in the search box, to return to the list simply delete the text in this box.

 **Tip:** The Search function will include all results, not just those on the page that is being viewed.

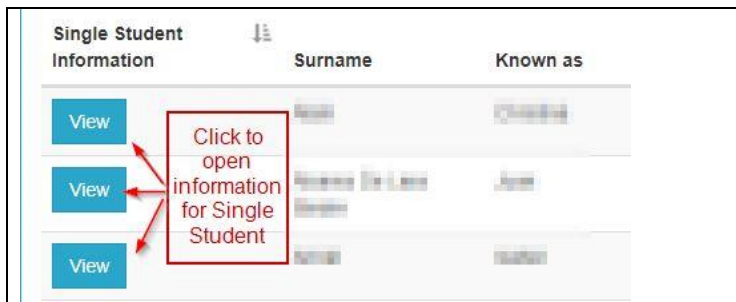
 **Tip:** To find students on interruption type “Not in attend” or “Out of attend” in the Search box.

**NB:** This will only apply if you have clicked the ‘Include Students on Interruption’ box on main page.

Search: <input type="text" value="Not in attend"/>	
<b>Current Enrolment Status</b>	<b>Mode of Attendance</b>
OUT OF ATTENDNC	NOT IN ATTNDNCE

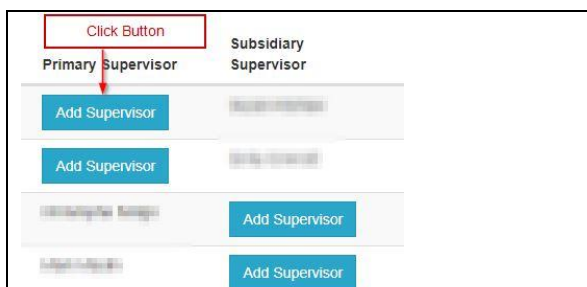


6. You will be able to access the Information for a Single Student report from any of the reports. This will open in a new tab:



**NB:** There is no 'Back' button on the Single Student View when it is opened from one of the main reports. Simply close the tab when you are finished.

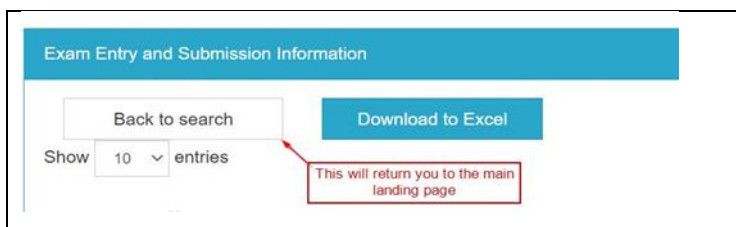
7. Some reports contain supervisor information. Where a supervisor is missing an 'Add Supervisor' button has been provided, this will take you directly to the student's Research Student Supervisor Maintenance page so you can update their record (only authorised users will be able to process a supervisor change with this function). See 'Core Information' report below.



**NB:** Supervisors will not be displayed once their end date has passed.

For information regarding supervisor management in Portico please refer to [the user guide](#).

8. The 'Back to search' buttons will return you to the main page.



## 2. The Reports:

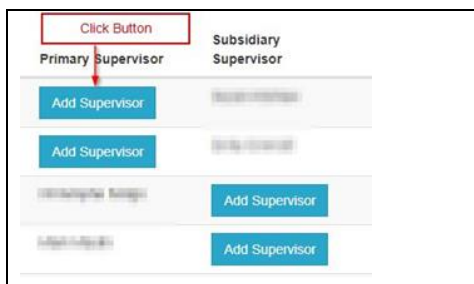
### 2.1 Core Information

1. This report provides core information for all the students:

Single Student Information	Surname	Known as	Student Code	Start date	Expected End date	Principal Supervisor	Subsidiary Supervisor	Award Level	Programme	Route	Current Enrolment Status	Mode of Attendance
<a href="#">View</a>	Wain	Christine	10000000	23/Sep/2019	15/Sep/2023	John J. Lee	Andrew Steer	PHD	100000000000	100000000000	ENROLLED	PART-TIME
<a href="#">View</a>	Wain	John	10000000	23/Sep/2019	26/Nov/2025	James Steer	Andrew Steer	PHD	100000000000	100000000000	ENROLLED	PART-TIME
<a href="#">View</a>	Wain	John	10000000	23/Sep/2019	15/Sep/2026	James Steer	Andrew Steer	PHD	100000000000	100000000000	ENROLLED	FULL-TIME

2. Only the most recently added supervisor will be listed on this report. If a student has multiple supervisors these will be listed on the Single Student View, click the 'View' button to access this information.

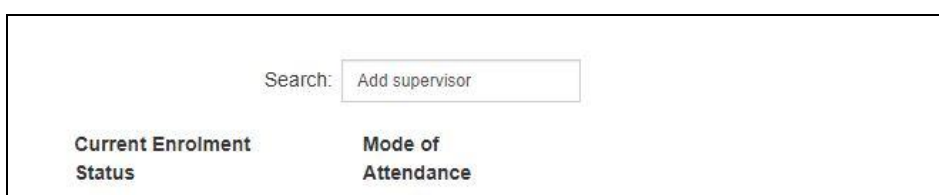
This report will also show where supervisors are missing from a student's record. An 'Add Supervisor' button has been provided which will take you directly to the student's Research Student Supervisor Maintenance page so you can update their record (only authorised users will be able to process a supervisor change with this function). For information regarding supervisor management in Portico please refer to [the user guide](#).



**NB:** Refresh (F5) will not work, to view any changes you must return to the landing screen and re-open the report.

**NB:** Supervisors will not be displayed once their end date has passed.

**Tip:** Quickly check where supervisors are missing by typing "Add Supervisor" in the Search box:



## 2.2 MPhil-PhD Upgrade

1. This list provides you with details of the upgrade status of your MPhil and PhD students.

The screenshot shows the 'MPhil-PhD Upgrade' interface. At the top, there is a 'Back to search' button and a 'Download to Excel' button. Below this, there is a search bar and a 'Show 10 entries' dropdown. The main content is a table with the following columns: 'Single Student Information', 'Surname', 'Known as', 'Student Code', 'Start Date', 'Principal Supervisor', 'Award level', 'Upgrade status', 'Panel date (For more details hover over date)', 'Record Upgrade', and 'Download Upgrade Panel Report'. Two rows of data are visible, both showing 'PHD' as the award level and 'Upgraded to PHD' as the upgrade status. The first row has a panel date of 14/Jul/2021, and the second row has a panel date of 17/Aug/2021. Each row has a 'View' button on the left and a 'Download Upgrade Panel Report' link on the right.

2. Students who have not yet upgraded will be listed as MPhil under 'Upgrade status' and N/A under the 'Panel Date' fields.
3. You will be able to access the MPhil-PhD Upgrade task directly from this page by clicking the 'Log Upgrade' button. This will open in a new tab.

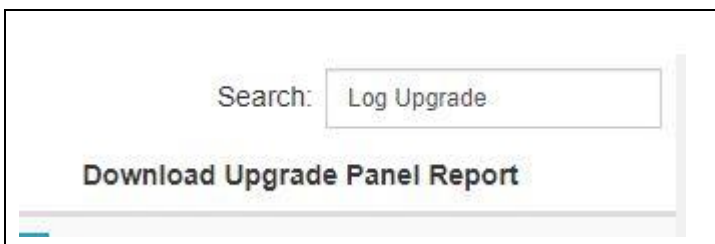
This is a close-up screenshot of the 'Log Upgrade' button. The table row shows 'MPHIL' under 'Award level', 'N/A' under 'Upgrade status', and 'N/A' under 'Panel date'. A blue 'Log Upgrade' button is visible in the 'Record Upgrade' column. A red box highlights the button with the text 'Click button to record Upgrade' and a red arrow pointing to the button.

**NB.** The 'Log Upgrade' button will not appear in the following circumstances:

- Students who have already completed their upgrade
- Students who have failed their second upgrade attempt.
- Any D\* coded programme (eg. EngD, DDent).

For further information on completing the MPhil-PhD Upgrade task please refer to [the user guide](#).

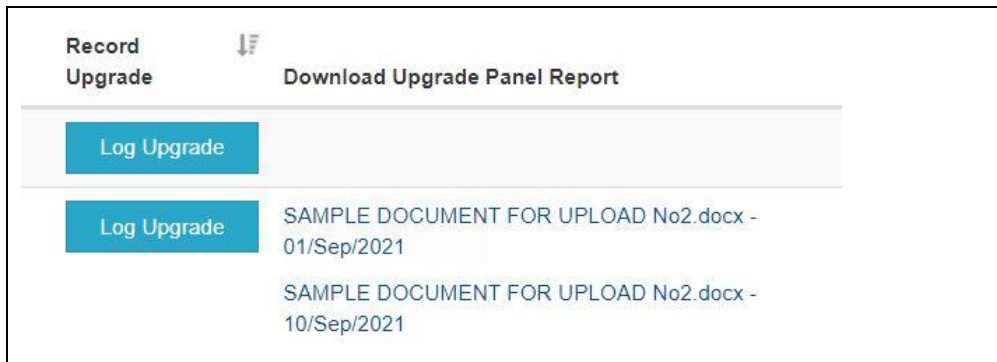
**Tip:** Quickly check which students have not upgraded by typing "Log Upgrade" in the Search box:



- The 'Log Upgrade' function will disappear from the report once a successful upgrade or failed second attempt has been recorded on Portico.

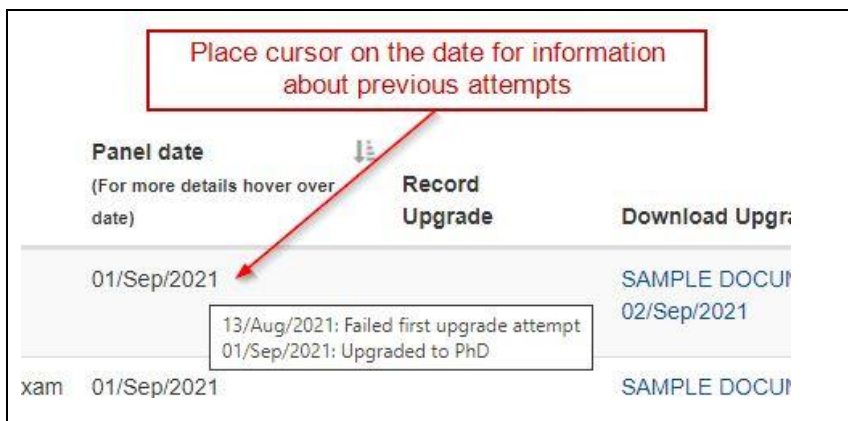
**NB:** Refresh (F5) will not work, to view any changes you must return to the landing screen and re-open the report.

- You will be able to download the latest Upgrade Panel Report if it has been linked to the student's Portico record:



**Tip:** Where a student has undergone a previous upgrade attempt, hover your cursor over the 'Panel date' which will show details of their first attempt.

**NB:** Where a second attempt has taken place you will only be able to view both panel reports (if uploaded) from the Single Student report.



## 2.3 Exam Entry and Submission Information

- In addition to the basic information this screen shows dates for the following:  
Exam Entry Processed  
Thesis Submitted  
Thesis Sent to Examiners

Exam Entry and Submission Information											
Back to search		Download to Excel									
Show	10	entries									Search:
Single Student Information	Surname	Known as	Student Code	Programme Code	Route Code	Principal Supervisor	Exam Entry Processed	Thesis Submitted	Examiners appointed	Thesis Sent to Examiners	
<a href="#">View</a>	John	John Doe	123456	1234567890	1234567890	John Doe	01/Aug/2021	04/Aug/2021	16/Aug/2021	06/Aug/2021	
<a href="#">View</a>	Thomas	Tom	123456	1234567890	1234567890	John Doe	21/Aug/2019	13/Sep/2019	08/Jun/2021	11/Jun/2021	
<a href="#">View</a>	John	John	123456	1234567890	1234567890	John Doe	19/Jan/2021		14/Apr/2021		

## 2.4 Examiner Information

- This report shows the following information:  
Examiner Nomination Form receipt date  
Examiners Appointed date  
Names of the Examiners  
Date the thesis was sent to the examiners

Examiner Information											
Back to search		Download to Excel									
Show	10	entries									Search:
Single Student Information	Surname	Known as	Student Code	Principal Supervisor	Examiner Nomination Form Received	Examiners appointed	First Examiner	Second Examiner	Third Examiner (if applicable)	Thesis Sent to Examiners	
<a href="#">View</a>	John	John Doe	123456	John Doe	05/May/2020	18/May/2020	John Doe	John Doe		26/Feb/2021	
<a href="#">View</a>	John	John	123456	John Doe	14/Nov/2019	09/Dec/2019	John Doe	John Doe		05/Mar/2021	
<a href="#">View</a>	John	John	123456	John Doe	16/Feb/2021	10/Mar/2021	John Doe	John Doe			

- Where the examiners have not been appointed the details will remain blank:


Examiners appointed	First Examiner	Second Examiner	Third Examiner (if applicable)
17/Aug/2021	John Doe	John Doe	
08/Jun/2021	John Doe	John Doe	

Examiners not yet appointed

Examiners appointed

3. Where a third examiner has been appointed their details will be listed:

First Examiner	Second Examiner	Third Examiner (If applicable)
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

 **Tip:** Normally the first examiner will be the internal, but this will not be the case if there are two external examiners.

## 2.5 Viva Information

1. This provides information regarding the viva and outcomes.

Single Student Information	Surname	Known as	Student Code	Thesis Sent to Examiners	Viva Date	Joint Report Rec'd	Latest Event <small>For more details hover over event</small>	Corrections Deadline	Designated Checker (Minor Corrections)	Corrections Rec'd / Student Notified
<a href="#">View</a>	[Redacted]	[Redacted]	[Redacted]			15/Aug/2021	Need final copies of thesis before issuing award	16/Nov/2021	[Redacted]	01/Sep/2021
<a href="#">View</a>	[Redacted]	[Redacted]	[Redacted]	05/Jan/2021	23/Mar/2021	31/Mar/2021	Minor revisions	01/Jul/2021	[Redacted]	
<a href="#">View</a>	[Redacted]	[Redacted]	[Redacted]	10/Nov/2020	01/Dec/2020	13/Dec/2020	Need final copies of thesis before issuing award	14/Mar/2021	[Redacted]	02/Jan/2021
<a href="#">View</a>	[Redacted]	[Redacted]	[Redacted]	06/Aug/2021	10/Aug/2021	12/Aug/2021	Minor revisions	15/Dec/2021	[Redacted]	


2. The 'Latest Event' field shows the current outcome. This could be the viva result or waiting for the student to submit the final copies of their thesis.

Joint Report Rec'd	Latest Event <small>For more details hover over event</small>	Corrections Deadline	Designated Checker (Minor Corrections)	Corrections Rec'd / Student Notified
10/Mar/2021	To resubmit thesis	10/Mar/2022	[Redacted]	
12/Aug/2021	Minor revisions	15/Dec/2021	[Redacted]	
03/Sep/2021	Need final copies of thesis before issuing award	04/Dec/2021		10/Sep/2021

Name(s) of designated checker(s) for Minor Corrections

The 'Corrections Deadline' is the date that the student must submit their revised thesis. This will either be directly to the designated checker for minor corrections or to the Registry for the resubmission outcome.

For an outcome of minor corrections, the name of the designated checker(s) will be listed. These details will remain on the report once the corrections have been completed.

 **Tip:** To see a full list of events for an individual student hover your cursor over the event, and this will show more information.

Place cursor on event for more information

## 2.6 Final Submission / Award Information

1. Will show the award dates for each student

Single Student Information	Surname	Known as	Student Code	Programme Code	Route Code	Corrections Rec'd / Student Notified	Confirmation of Final Thesis Submission	Incorrect Thesis Title - email sent	Award Level	Award Date
<a href="#">View</a>	...	...	...	R100000000G01	R100000000G01	16/Aug/2021	17/Aug/2021	18/Aug/2021	MPHIL	
<a href="#">View</a>	...	...	...	R100000000G01	R100000000G01	02/Jan/2021	05/Jan/2021	10/Jan/2021	PHD	28/Jan/2021

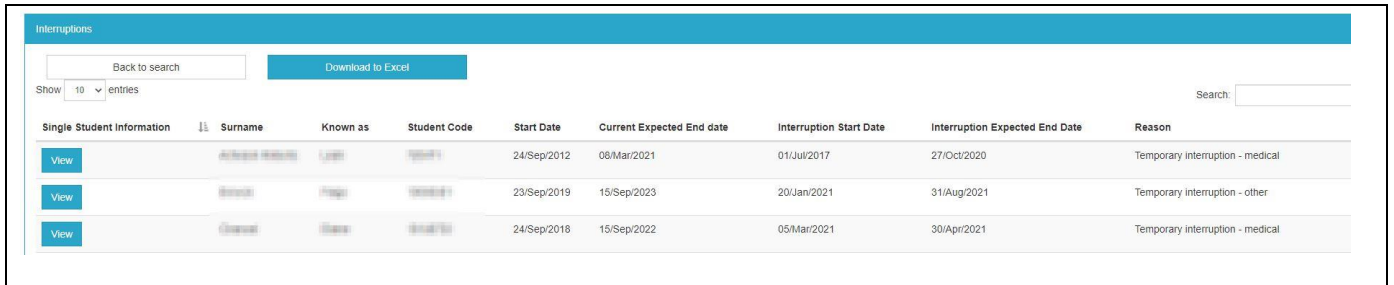
2. Research degrees are awarded on the 28<sup>th</sup> of the month that all the requirements have been met.

Where the thesis title differs to that shown on Portico, we send an email to the supervisor for clarification of the revised title. This will be indicated on the report:

Confirmation of Final Thesis Submission	Incorrect Thesis Title - email sent	Award Level	Award Date
17/Aug/2021	18/Aug/2021	MPHIL	
05/Jan/2021	10/Jan/2021	PHD	28/Jan/2021

## 2.7 Interruptions

1. This will show which students are currently on interruption during the academic year selected and will only show their latest interruption.



Single Student Information	Surname	Known as	Student Code	Start Date	Current Expected End date	Interruption Start Date	Interruption Expected End Date	Reason
<a href="#">View</a>	ALLEN, ALEXANDER	ALLEN	1234567	24/Sep/2012	08/Mar/2021	01/Jul/2017	27/Oct/2020	Temporary interruption - medical
<a href="#">View</a>	BROWN, JANE	BROWN	7654321	23/Sep/2019	15/Sep/2023	20/Jan/2021	31/Aug/2021	Temporary interruption - other
<a href="#">View</a>	SMITH, JOHN	SMITH	9876543	24/Sep/2018	15/Sep/2022	05/Mar/2021	30/Apr/2021	Temporary interruption - medical

**NB.** This report will not show where a student has had multiple or previous interruptions.



## 2.8 Single Student Information

1. This brings together all the information for a single student in one place.

Core Information Email Student

Surname	Known as	Student Code	Start Date	Expected End date	Award level	Route	Current Enrolment Status	Mode of Attendance	Student Summary
Thompson	Corrate	10100000	28/Sep/2020	15/Sep/2024	PHD	RPHD/AL/SPH/01	ENROLLED	FULL-TIME	<a href="#" style="background-color: #0070C0; color: white; padding: 2px 5px;">View</a>

Showing 1 to 1 of 1 entries

Supervisory Team Email All

Level	Name	Start Date	End Date
Principal supervisor	<a href="#">Dean Kelly</a> <a href="#" style="background-color: #0070C0; color: white; padding: 2px 5px;">Email Supervisor</a>	28/Sep/2020	
Principal supervisor	<a href="#">Bernie Butler</a> <a href="#" style="background-color: #0070C0; color: white; padding: 2px 5px;">Email Supervisor</a>	07/Oct/2021	
Subsidiary supervisor	<a href="#">Mark Atkinson</a> <a href="#" style="background-color: #0070C0; color: white; padding: 2px 5px;">Email Supervisor</a>	28/Sep/2020	

Showing 1 to 3 of 3 entries

Add/Change Supervisor

MPhil-PhD Upgrade

Upgrade status	Upgrade Date	Record Upgrade	Download Upgrade Panel Report
Upgraded to PhD	13/Aug/2020		<a href="#">TEST DOCUMENT FOR UPLOAD No1.docx - 13/Aug/2021</a> <a href="#">TEST DOCUMENT FOR UPLOAD No2.docx - 13/Aug/2021</a>

Showing 1 to 1 of 1 entries

Exam Entry, Submission, and Examiners

Exam Entry Processed	Examiner Nomination Received	Thesis Submitted	Examiners appointed	First Examiner	Second Examiner	Third Examiner	Thesis Sent to Examiners
01/Aug/2021	02/Aug/2021	31/Aug/2021					01/Sep/2021

Showing 1 to 1 of 1 entries

Viva Information

Event	Date Processed	Designated Checker (Minor Corrections)	Deadline
Thesis sent to examiners	01/Sep/2021		
Date of Viva	02/Sep/2021		
All examiner reports recieved	03/Sep/2021		
Minor revisions	04/Sep/2021	<a href="#">Display Entry Detail</a>	04/Dec/2021
Awaiting final copy of thesis	10/Sep/2021		

Showing 1 to 5 of 5 entries

Final Award

Confirmation of Final Thesis Submission	Incorrect Thesis Title - email sent	Award Level	Award Date
05/Jan/2021	10/Jan/2021	PHD	28/Jan/2021

Showing 1 to 1 of 1 entries

[Back to search](#)

**NB:** Where a student has two research records (for example, where they have left one research course and started another) you will be taken to an additional screen to select which record to view:

**Research Student Reports**

View user guide [here](#)

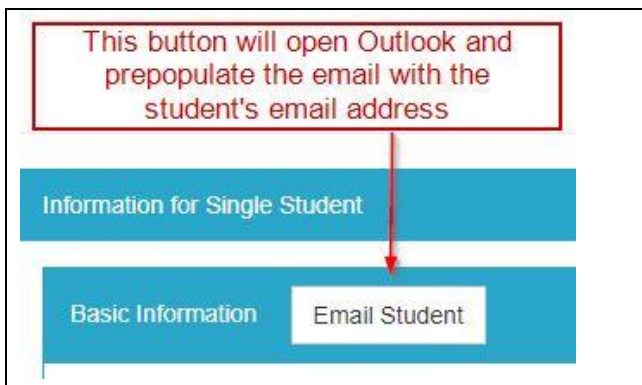
This student has more than one possible instance to view. Please select from the list below which instance you would like to view.

Select Student instance to view

- PhD Philosophy (Started: 2016) - Status: Enrolled
- PhD Philosophy (Started: 2016) - Status: Enrolled
- MPhilStud Philosophical Studies (Started: 2014) - Status: Permanent Leaver

Back to Search    Select Student

2. You can send an email to the student from this page.



The 'Email Student' button will open Outlook and prepopulate the message with the student's email addresses listed on Portico.

**NB:** These emails will be sent from your own account; no record will be kept in Portico of emails sent via this method.

Send

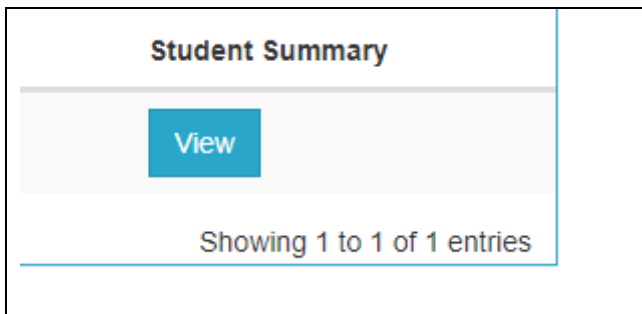
From ▼ your.username@ucl.ac.uk

To

Cc

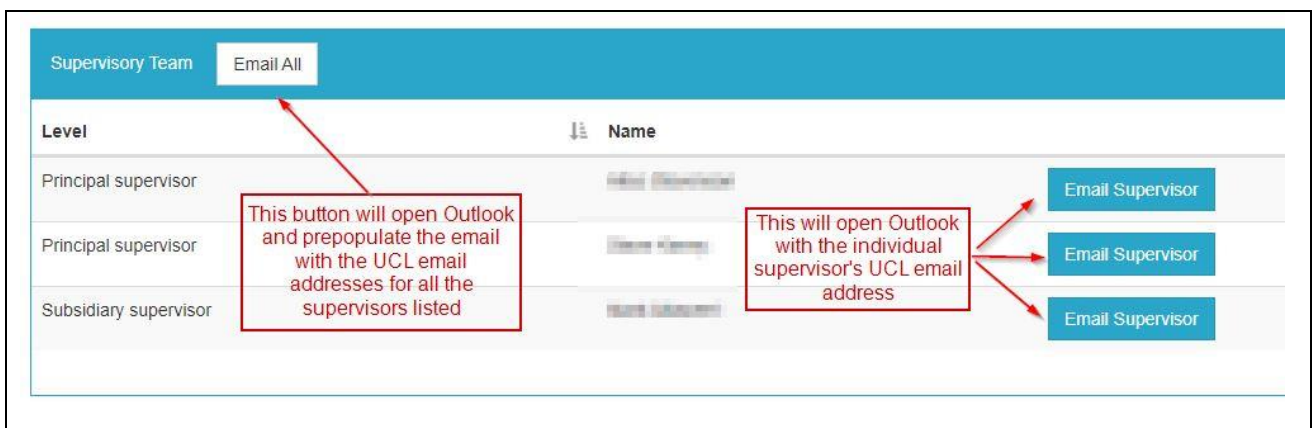
Subject Regarding your Research Programme at UCL

- You can view the existing full student summary page using this link, which will open in a new tab:



This page replicates what the student sees in Portico and includes information on all the courses they have undertaken at UCL.

- You will be able to view all the current supervisors from this page and send an email to them, either individually, or collectively:



**NB:** These emails will be sent from your own account; no record will be kept in Portico of emails sent via this method.

- If an end date has been recorded for the supervisor's appointment this will be shown here:

Start Date	End Date
23/Sep/2021	22/Oct/2023
28/Sep/2020	

**NB:** Supervisors will not be displayed once their end date has passed.

- An 'Add/Change Supervisor' button has been included which will take you to the Research Student Supervisor Management page (authorised users only):

Supervisory Team
Email All

---

**Level**

Principal supervisor

Subsidiary supervisor

---

Add/Change Supervisor

**NB:** For information regarding supervisor management in Portico please refer to [the user guide](#).

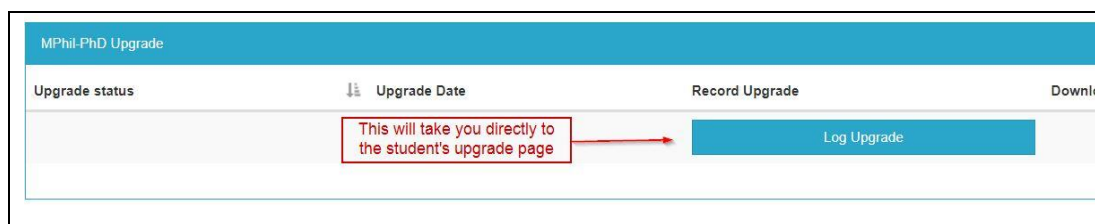
Search Results						
Student number	Surname	Known as	Start date	Programme code	Supervisor(s) (Level - Name - End date)	Add supervisor
12345678	A. Smith	Dr. A. Smith	23/Sep/2019	R100000001	Principal supervisor: Prof. R. J. Smith Principal supervisor: Dr. A. Smith Subsidiary supervisor: Mrs. J. Smith	Add
			New search	Exit		

**NB:** Only authorised users will be able to process a supervisor change with this function.

- You will be able to view the upgrade history and download any reports that have been linked to the student's Portico record:

MPhil-PhD Upgrade			
Upgrade status	Upgrade Date	Record Upgrade	Download Upgrade Panel Report
Failed first upgrade attempt	23/Aug/2021		SAMPLE DOCUMENT FOR UPLOAD No1.docx - 25/Aug/2021
Upgraded to PhD	25/Aug/2021		SAMPLE DOCUMENT FOR UPLOAD No3.docx - 25/Aug/2021

8. You can also note a student's upgrade directly from this screen.




**NB.** The MPhil-PhD Upgrade container will not appear for any student on a D\* coded programme (eg. EngD, DDent).

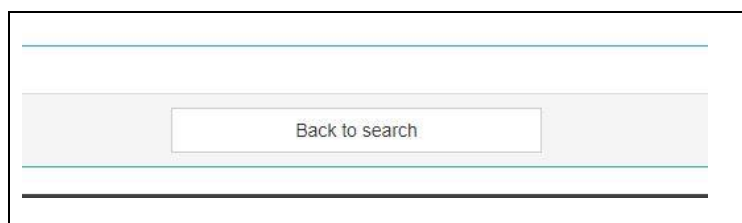
The 'Log Upgrade' button will not appear in the following circumstances:

- Students who have already completed their upgrade
- Students who have failed their second upgrade attempt.

For further information on completing the MPhil-PhD Upgrade task please refer to [the user guide](#).

 **Tip:** If you record the upgrade via the Single Student report you can press F5 (refresh) after processing the upgrade and the information will appear.

9. The 'Back to search' button will return you to the main menu:



**NB:** This button will only appear if you have accessed the report directly from the main menu. If you have accessed this via one of the other reports, it will have opened in a new tab which can simply be closed.