Student Admin Manager (SAM)

@ The Graduate School

User guidance

leedsbeckett.ac.uk/the-graduate-school/

**STUDENT ADMIN MANAGER (SAM) at The Graduate School**

EXAMINATIONS: *Please note that functionality supporting PGR examinations (eg: marking your intention to submit, submitting your thesis, viva voce panel) will be rolled out during Summer 2021. Look for future updates from The Graduate School.*

1.1 ACCESSING THE SYSTEM

Go to www.sam.leedsbeckett.ac.uk and click **Login to SAM**

Post Graduate Researchers (PGRs) – you can also find this link on the Graduate School website in the Useful Information section.

Staff – SAM appears as a link under corporate systems on the Staff Intranet
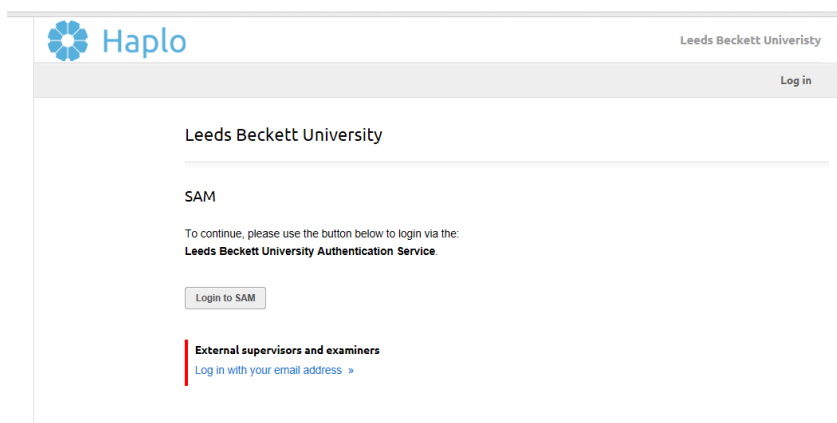
You'll be taken to the University portal where you need to enter your Leeds Beckett email address and associated password.
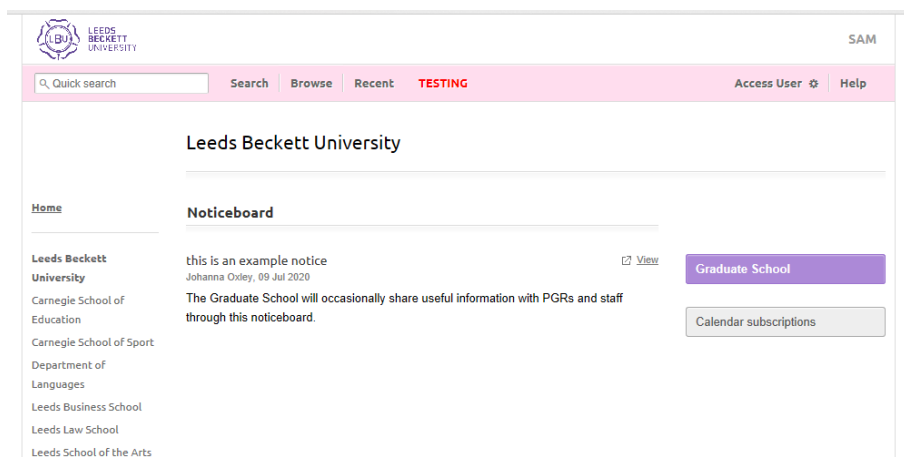
1.2 THE HOME PAGE

Once logged in all users see the same home page, with different levels of access (based on user permissions) to:

- University structure
- Committees displays the relevant committees and upcoming meetings
- Calendar displays upcoming training and development events
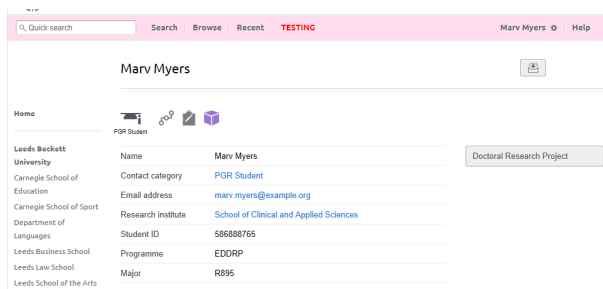- Guides on how to use SAM

1.3 YOUR PROFILE PAGE (PGRs)

Click on **My Record** to go to your user profile. Every user has a profile page which displays key information.

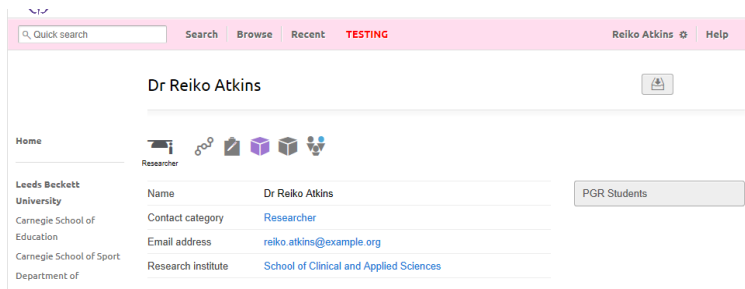It includes links on the right to relevant functionality for this user.

1.4 YOUR PROFILE PAGE (Supervisory Team)

Click on **My Record** to go to your user profile. Every user has a profile page which displays key information.

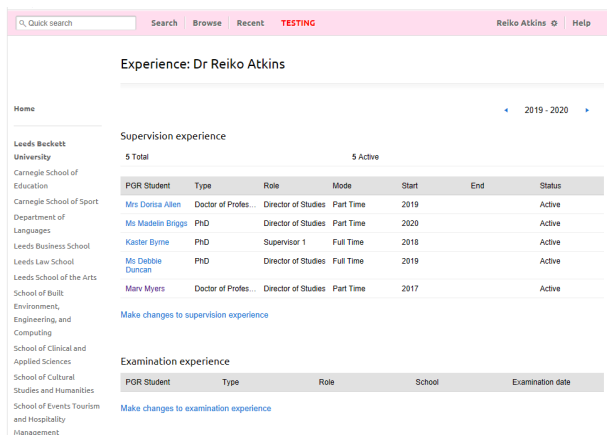It includes links on the right to relevant functionality for this user.

Clicking **PGR Students** will display the supervisor's current and historic supervision records. Examination experience is also displayed. Links to the postgraduate researchers they have supervised or have examined will also be provided.

Supervisors can add external supervision and examination experience.

1.5 YOUR PROJECT PAGE (PGRs)

Clicking the My Project button will take you to your project page. It contains key information related to your research project as well as links to all system functionality.

1.6 PROGRESSING FORMS

SAM uses a very simple colour-coded system to manage outcomes on the various forms throughout the system.

Green – action, progress or approve

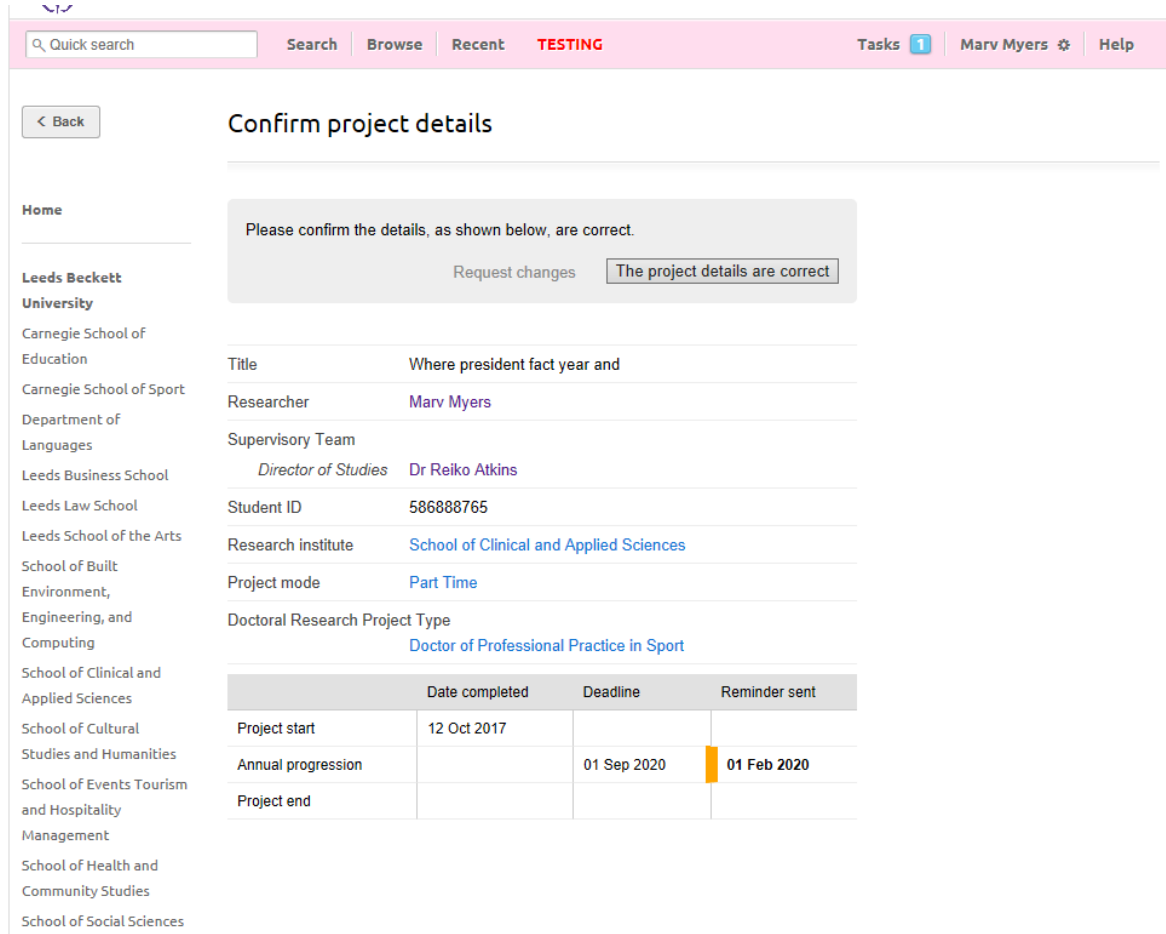**Orange** – return to a previous user in the workflow

Red – do not approve

STATUS
Waiting for supervisor to approve

CURRENTLY WITH
Eulalie Yates

● Edit supervisor report

● Return to submitter

● Not approve

Before submitting a form there is an opportunity to add notes and private notes. After submission, these notes can be edited by the user who submitted them.

1.7 CONFIRM PROJECT DETAILS PAGE

In SAM, applications start with a check that key information on the project is correct. If it is not, click the "request changes" link and follow the directions provided.

1.8 TASKS AND NOTIFICATIONS

Users receive an email notification and task when they are required to take action in a workflow.

Tasks are displayed to the user in the top right of all pages and disappear when the action is completed.
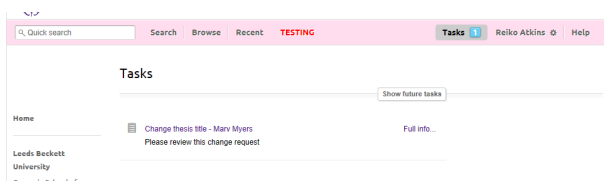

1.9 USER GUIDES AND GUIDANCE

Whenever you see an 🛈, click it to see further guidance on the process you're undertaking. You can also refer to the Research Student Handbook for more information.

PGRs can find all user guides by using the Guides in the left-hand menu.

1.10 CALENDAR SUBSCRIPTIONS

You can link your SAM account to your calendars on Outlook, iOS and others. Click on the Calendar Subscriptions button and follow the step by step guide relevant to your personal email/calendar setup.
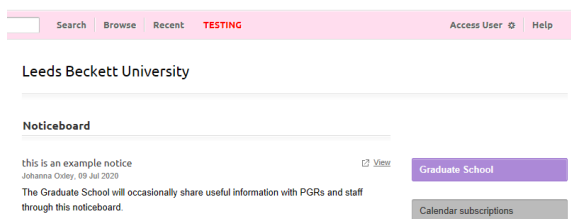
2.1 SUPERVISION MEETINGS

Supervisory meetings can be started by supervisors or PGRs.

They can be scheduled for the future (which will send an email notification to the participants selected) or recorded after the meeting has taken place.

Meetings can be recorded as:

- In person
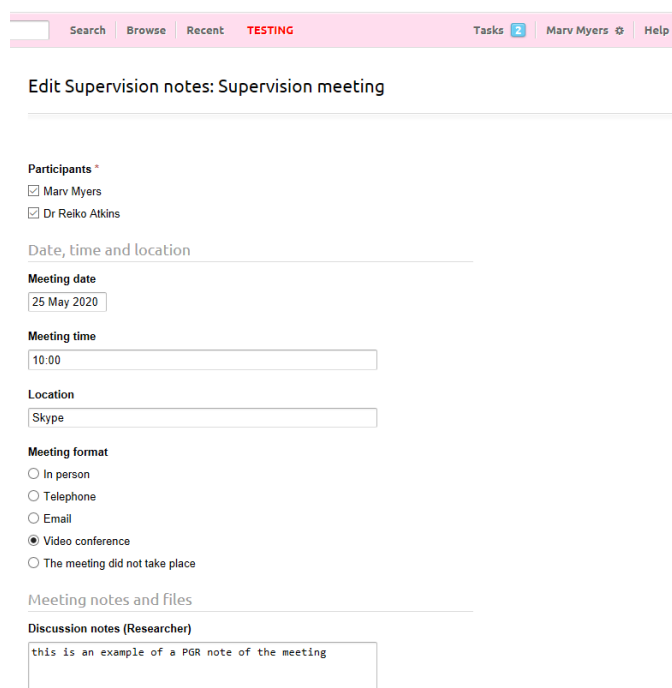- Telephone
- Email
- Video conference

Meeting notes are then added by the PGR and supervisor attending the meeting.

The meeting notes are confirmed, or revisions can be requested.

Once the meeting is marked as complete, follow-on notes can be added.

The meeting can also be recorded as not taking place.

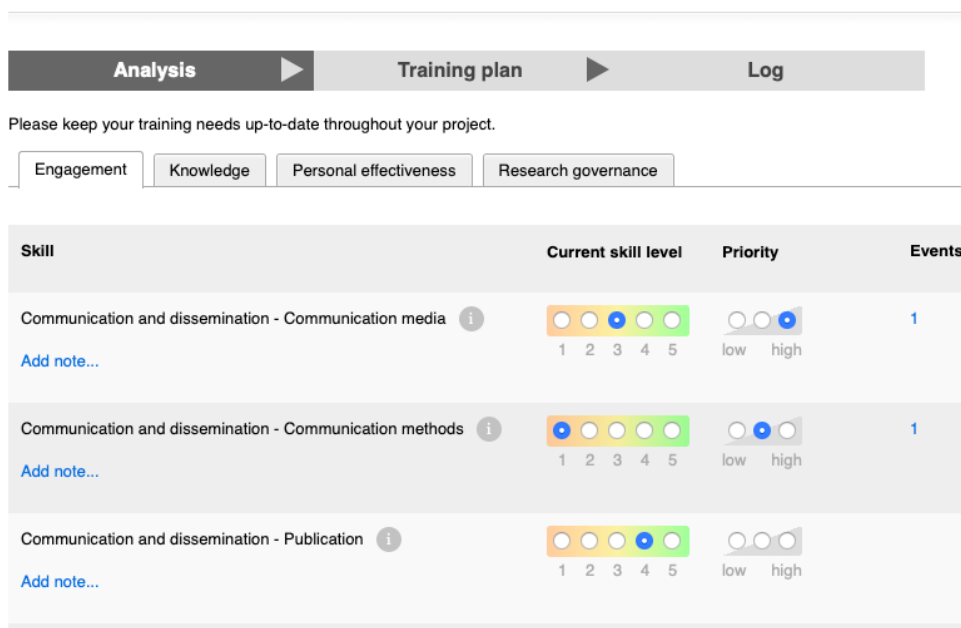Previous supervisory meetings are displayed by academic year and can be downloaded.

2.2 TRAINING AND DEVELOPMENT

Training and development activities are recorded by the postgraduate researcher in the following ways:
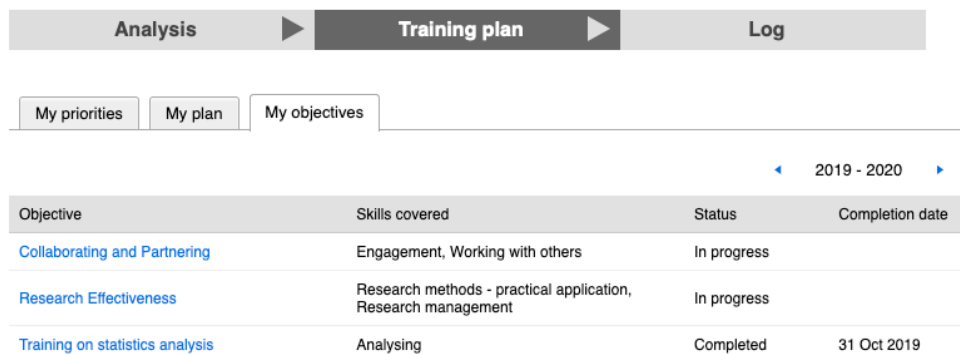
Analysis

Provides a training needs analysis which allows skill level and priorities to be set, with links to training and development events setup by The Graduate School and Libraries teams.

Training Plan

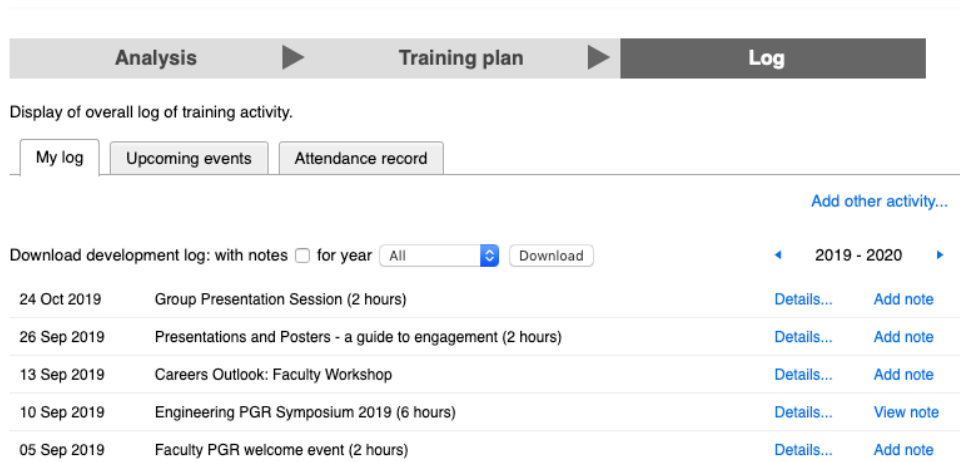Your training plan can be reviewed and submitted throughout the academic year.

Log

Postgraduate researchers are invited to institutional events and can respond via the system.

These events are logged and the attendance record displayed.

External events can be added by postgraduate researchers.
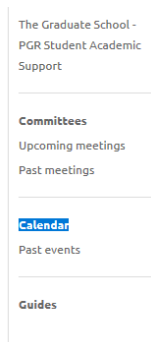
The log can be downloaded.

All Events

PGRs can find a list of all events, workshops, and training opportunities available through the Graduate School and Library Training and Development Teams by using the Calendar in the left-hand menu.

3 CHANGE REQUESTS

Change requests are typically submitted by the postgraduate researcher (PGR) or a member of the supervisory team to request a change to registration.
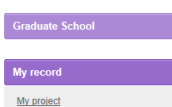
These requests are reviewed by the Research Degree Sub Committee. On approval, SAM will update the relevant elements of your Project Page.
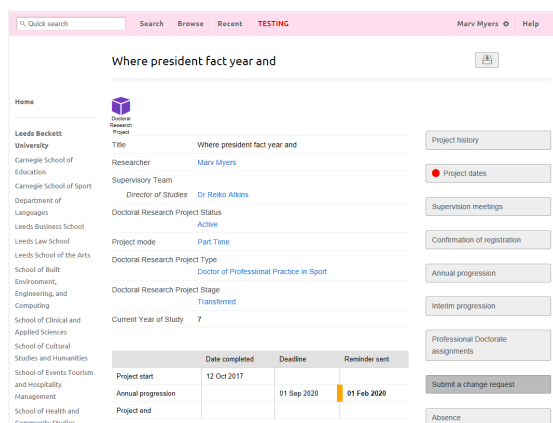
These include:

● Change in Mode

● Change thesis title

● Early Submission

● Extension

● Suspension

● Thesis Title Change

● Withdrawal

● Writing Up

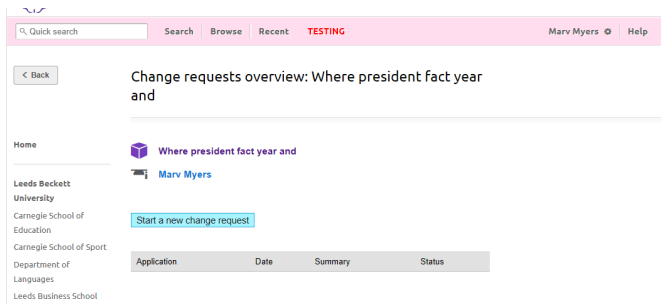### 3.1 PGRs

Go to your project page by clicking **My Project**.

Click on **Submit a Change Request** in the right-hand menu.

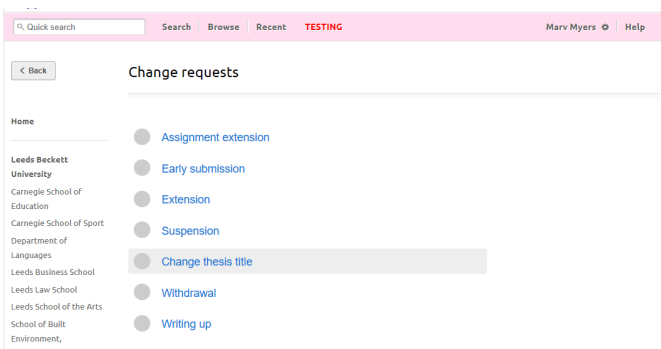The system will display any historic or current Change Requests. Click **Submit a new change request**.
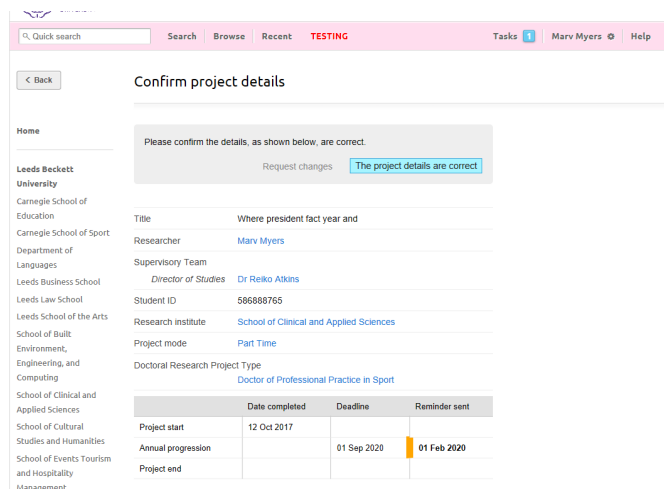
Next, choose which type of change request you need to submit.

SAM will ask you to check that your current project details are correct before continuing.
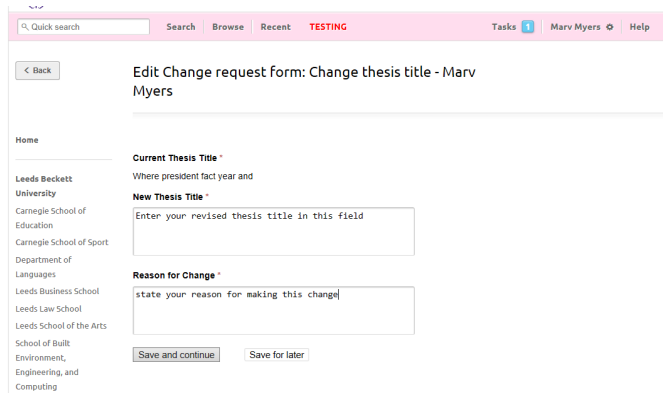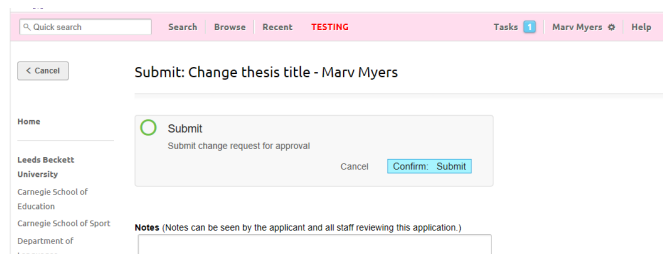
Provide the information requested on screen. In this example, the request is to amend the Thesis Title so the new title and a reason for change is requested. Other change requests will ask you to provide different information.
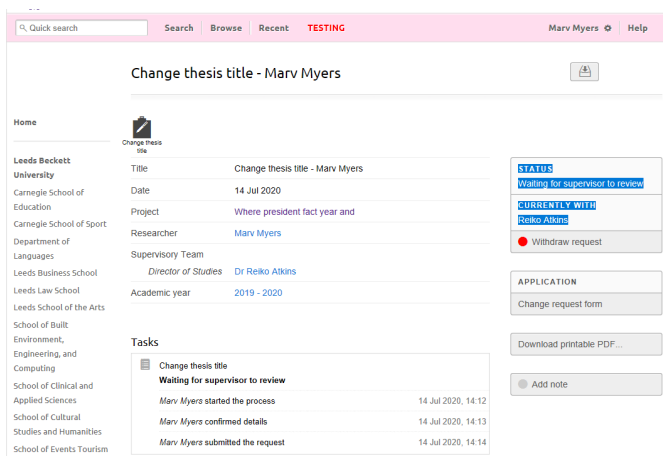

Finally, click Submit.

SAM will show you the current status of your request and which user is currently dealing with the task. PGRs also have the option to withdraw their change request on this same screen.
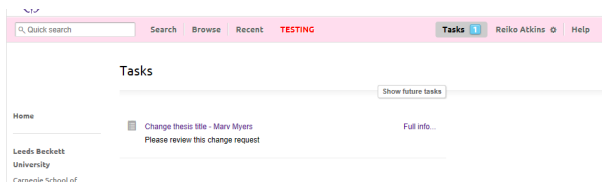

You will receive email alerts as your request is reviewed by other users within the system (your supervisory team and the Research Degree Sub Committee).
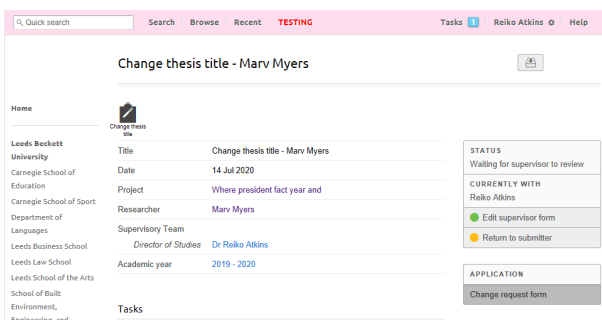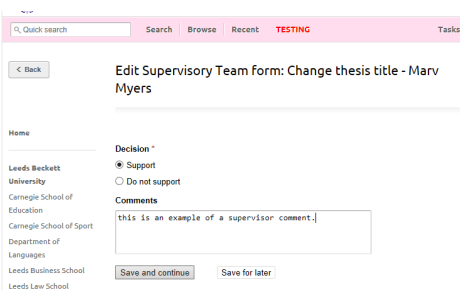
3.2 Supervisors

Go to Tasks and click on the Request you wish to progress

Review the details provided by the PGR. You can request further information using the **Yellow** button then make a decision using the **Green** button.

Choose "Support"/ "Do Not Support" and add a comment explaining your decision, then click **Save and Continue**.

3.3 Graduate School & RDSC Members

Go to Tasks and click on the Request you wish to progress

Choose the appropriate route through the Research Degree Sub-Committee (RDSC). The options are:

Online decision – send to members of the committee to each make a decision on an outcome. The Chair can then use the member votes to formally confirm the outcome.

Schedule meeting – add the request to one of the upcoming RDSC meetings.

Request Review – Arrange a meeting to discuss the request before formal submission to RDSC

Forward application to Chair – Deal with the request as a Chair's Action.

Forward application to Deputy Chair – On the occasion the Chair is unavailable, the task can be delegated to the Deputy to deal with the request as a Chair's Action.

All of the above routes allow RDSC Members to review the forms submitted by the PGR and Supervisory Team before making their decision.

Once a decision has been made, the RDSC secretary will then Edit the form.

The secretary will update the record to complete the request. Click **Save and Continue**.

4 CONFIRMATION OF REGISTRATION

Confirmation of Registration is initiated by the postgraduate researcher (PGR) and is the first milestone in the PGR journey.

The CoR documents submitted by the postgraduate researcher will be reviewed by a panel who will meet with the PGR to discuss their proposed project. On approval, SAM will update the relevant elements of the Project Page.
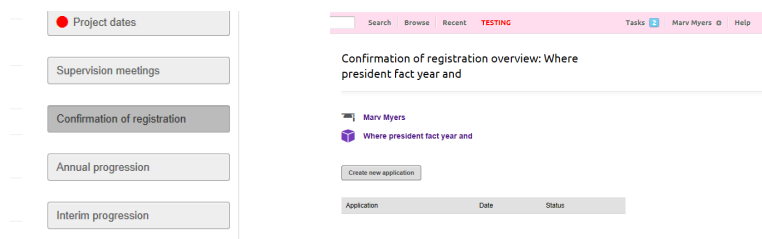
For PGRs on a _Full Time_ project, your Confirmation of Registration will take place four months after your project start date. For PGRs in an October cohort, your CoR meeting will take place in the January of the following year. For those in a February cohort, your CoR meeting will take place in June.

For PGRs on a _Part Time_ project, your Confirmation of Registration will take place six months after your project start date. For PGRs in an October cohort, your CoR meeting will take place in the March of the following year. For those in a February cohort, your CoR meeting will take place in August.
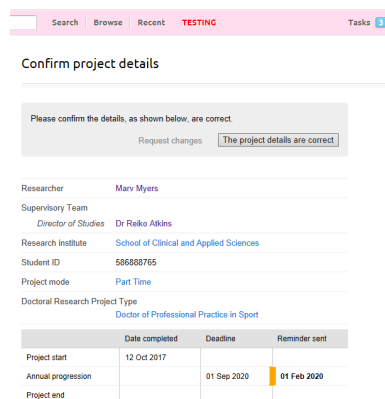
SAM will prompt you with reminders to begin the Confirmation of Registration process.

4.1 PGRs

Click on **Confirmation of Registration** followed by **Create new application**.

Check that your Project Details are correct. Notify the Graduate School team if they are not.
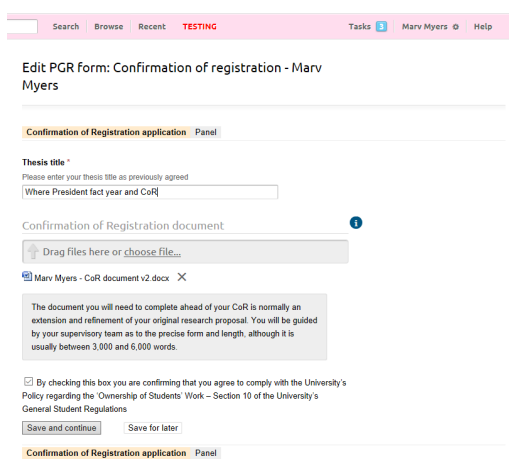
Complete all fields on the **Confirmation of registration application** tab, making sure you also upload your supporting CoR document.

Whenever you see an ⓘ, click it to see further guidance on the process you're undertaking. You can also refer to the Research Student Handbook for more information.

Next, complete all fields on the Panel tab.

Finally, click Submit.
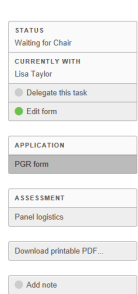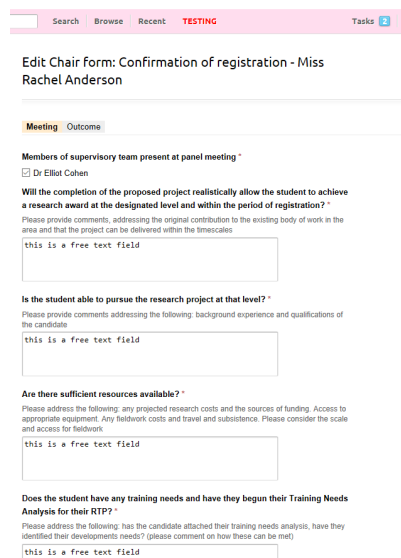
4.2 CoR Panel Members

Check your tasks and select the relevant CoR Panel meeting. Panel members can review the information submitted by the PGR by clicking on the **PGR Form**.

The Panel will complete all sections on the Meeting tab.

The Panel will then complete the **Outcome** tab and make a determination on the PGR's registration. On the next screen, click **Submit**.
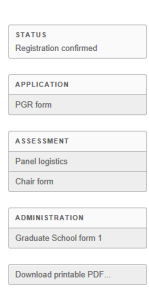
4.3 Graduate School

Review the Outcomes, if any amends require a Change Request to be sent to RDSC, initiate the request.

Once confirmed, the status on the CoR will be updated.

5 ANNUAL PROGRESSIONS

Annual progression is a key milestone as it is the official mechanism by which you will be permitted to move from one year to another. Its purpose is to ensure you have made sufficient progress, have plans in place and the sufficient support to complete your programme successfully.

The meetings usually occur in the month before you are required to re-enrol online. For PGRs in an October cohort, your Progression meetings will usually take place in September. For those in a February cohort, Progression meetings will usually take place in January.

<u>5.1 PGRs</u>

Go onto your Project Page and click **Annual Progression**.

Click **Create new application**.

Confirm that your Project Details are correct.

Work your way through all the tabs. Some fields are free text entry, some require a file to be uploaded, whilst others are pre-defined.

Free text

File uploads

Pre-defined

On each tab you can either Save and Continue or Save for Later.

If you try to save without completing a mandatory field, SAM will alert you.

Once all mandatory elements have been completed, you will be able to **Submit** your application.

5.2 Supervisors

Go into Tasks and select the Progression that you wish to review.

Review the information submitted by the PGR.

Click Edit Supervisor Report and provide your feedback on the PGR submission.

5.3 Graduate School

Enter the date/time for the meeting, panel members and other key details. Note, if staff are not appearing in the search field, report the issue to the SAM Helpdesk.
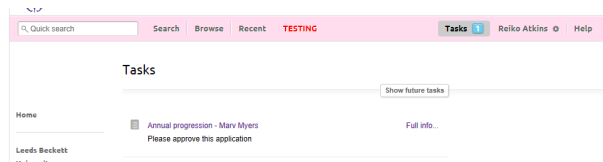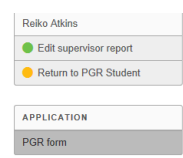

If these details have already been populated the next task will be to prepare the papers for the meeting, checking that suspension, fees, and previous meeting notes are correct and ready for the panels reference.

5.4 Progression Panel Members

Go onto your staff record and click on the Annual Progression icon. Select the relevant Progression.
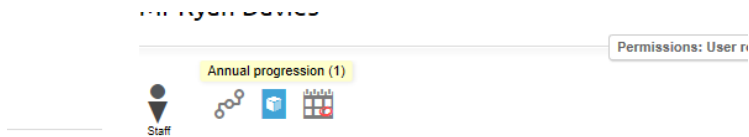
Review the details provided by the PGR, their supervisory team, and the Graduate School.

At the meeting, the Graduate School representative will capture notes of points discussed and enter them onto SAM in the Minutes tab.

Next, make a determination on the PGR Progression using the Outcome tab. Guidance on Outcomes can be found by clicking the ℹ icon.

Note: outcome options vary depending on the PGR award type. In this example, the PGR is working towards a PhD award.

Outcomes for Written Warning (Callback), Alternative Award, and Withdrawal will trigger additional tasks for the PGR and the Graduate School to complete.

6 RESEARCH DEGREE SUB COMMITTEE

The Research Degree Sub Committee is the only committee in the University that can approve changes to a Postgraduate Researcher record. The RDSC meets each month from September to July. Dates are listed on SAM, click on the Calendar link in the left-hand menu to view all dates.
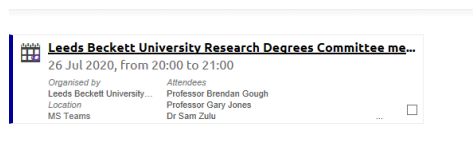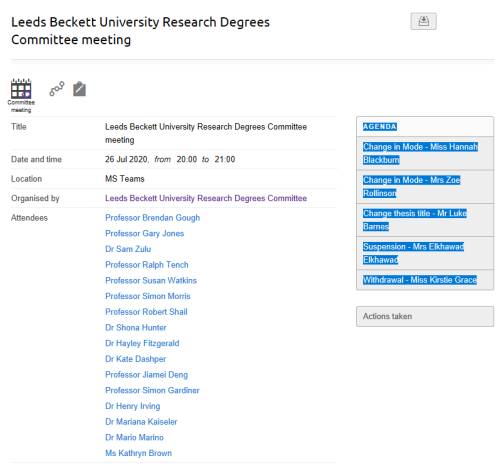
RDSC Members

Click on the **Upcoming Meetings** link
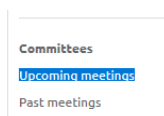
Select the relevant meeting

Requests are sorted by type under the **Agenda**. Simply click on a request to view the details.

At the meeting, the Secretary of RDSC will record all outcomes and SAM will send a notification to the PGR and their supervisory team advising them of the decision.