

HDR Milestones

HDR Policy and Procedures reference: **Candidature Progress Management**

This guide shows staff how to record Milestones of a higher degrees by research (HDR) student by creating a **Significant Date** related item in the Postgraduate Module of ResearchMaster (RM). Milestones are recorded at the School of Graduate Research (SGR).

Guidelines and rules

Three Milestone reminder records and one Milestone completion/result record are set up by the RM feeder system automatically and updated every morning. SGR staff may also flag records for manual processing. The following details expected system behaviours and manual processing steps.

System behaviours

Significant Date items are set up based on EFTSL consumed (see tables 2.1.1 and 2.1.2) for 'Current' (Overall Status) candidatures with Program Codes 'MR...RTS' and 'DR...RTS' respectively. Exclusions of specific candidature records or Significant Date items must be flagged using the methods specified in Section 2.2 below.

System rule for creating/updating Milestone Significant Date items:

All future-dated Significant Date items should be available for every candidature record. An email template should be set up for each reminder Significant Date item when it is first created. Future 'Date of Action' and 'Est. Completion Date' of each Significant Date item should be updated daily and calculated per the schedules below (Section 2.1.1 and 2.1.2), unless:

- If any item has been flagged as exclusions, following the rules set out in Section 'To set manual override flags' below.
- If the corresponding '... completed' Significant Date item is marked as 'Completed', all reminder Significant Date items for that milestone should be marked as 'Completed'.
- If any reminder Significant Date items' email is marked as 'Sent', it is then marked as 'Completed' following feeder update the next morning, with the Actual Completion Date populated as the email sent date. The item will no longer be updated by the system again.
- For upgrade (MR to DR) or downgrade (DR to MR), all future items not marked as 'Completed' will be removed by the system on the day of the program change, and new items for the new program will be added
- The Est. Completion Date for future incompletes items will be updated when there is load change.

Note: Milestone EFTSL will be populated in the EFTS field in the 'Completion Details' panel of each Significant Date with precision up to 3 decimal points. This will also serve as a unique identifier for the reminders, as all three reminders of each milestone share the same Significant Date Type. A database table has been set up for possible changes to the timeline. The system will update all active Significant Date items with the new values the next time the feeder runs.

System EFTSL calculation:

If Milestone EFTSL \geq Consumed Load, Milestone related dates should be calculated as **System Date + (Milestone EFTSL - Consumed Load) / Present Load \times 365.25 + Days of Leave starting before Milestone EFTSL and after System Date.** Note:

- For leave days to be reduced from the consumed EFTSL, Leave type must be 'Approved Leave', 'Maternity Leave', or 'Withdrawn Leave'; the Start Date of the leave must be before the Milestone EFTSL calculated without the leave)
- Load changes are only brought into RM on the day, so RM should not have future load change records. For manual calculations, if Load change is dated during any Leave period, use the Leave end date as the Load change date.

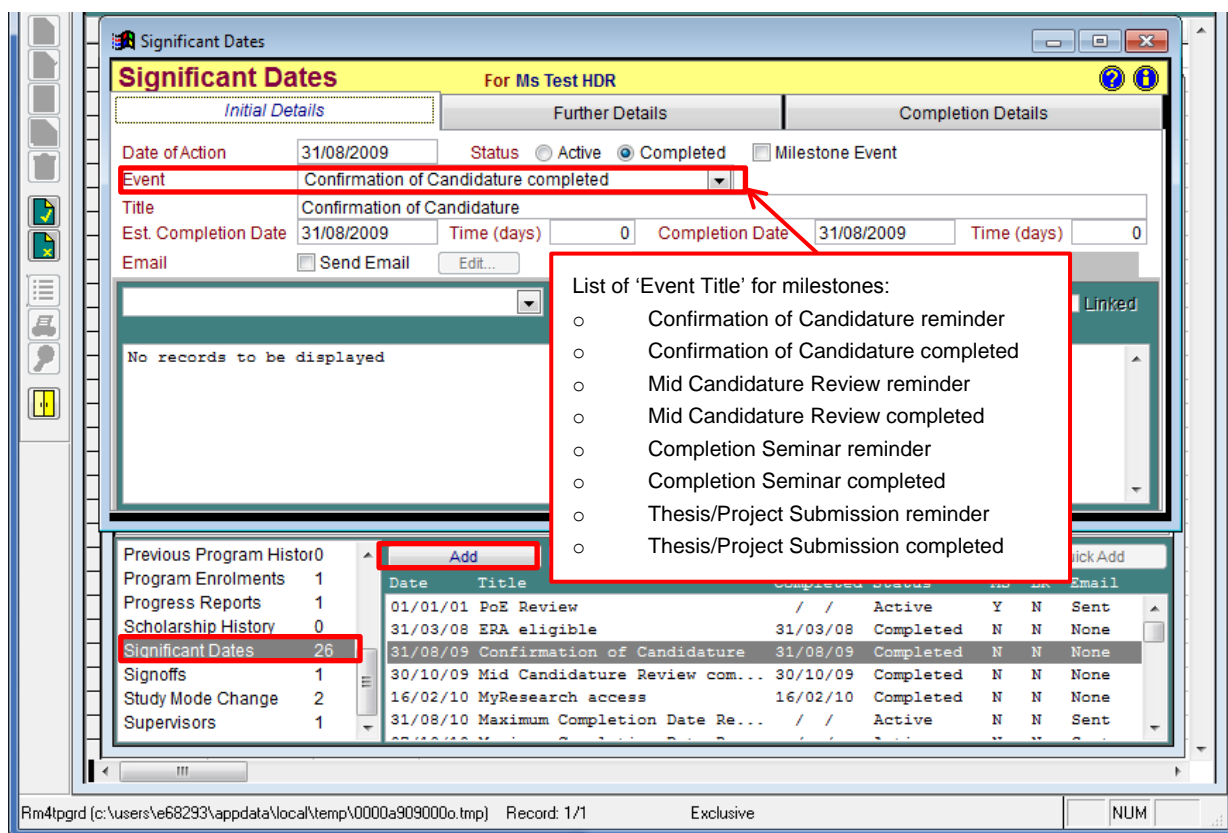
Refer to <http://www.rmit.edu.au/browse;ID=zdjveagd5smrz> for further details.


To record a Milestone manually

A milestone item may be manually created in the following situations:

1. manually create all reminder and '...completed' Significant Date items for a milestone if Milestone EFTSL < Consumed Load
2. If the Consumed Load is increased as a result of any manual change to the Candidature Start Date, Leave, Study Mode, or Program, causing incorrect, incomplete, past Milestone Due Dates, make sure all these Significant Date items are updated and managed manually as appropriate.)
2. manually update Estimated Completion dates for past items or future completed items as appropriate.
3. When a milestone requires amendment, manually add the amendment results using '...completed' Event type and select 'Committee' for the 'completed' milestone item if any reminders are still yet to be sent out, or mark the reminders as 'Completed'.

Follow the steps below to manually create or modify a milestone Significant Date item:



- 1 Select **Significant Dates** from the list in the selection field for related data types.
- 2 Click  to display the **Add Confirmation of Candidature** screen.
- 3 Complete the details as follows on the three tabs

Milestone 'Completed' Significant Date	Date of Action	Event	Title	Est. Completion Date	Actual Completion Date	Completion Notes	Responsibility	EFTS
Reminder of Milestone	Date reminder (to be) sent out	'[Milestone] reminder'	'[Milestone] reminder'	Official Due Date of Milestone	Date reminder sent out	blank	Blank	See Appendix
1st Submission of Milestone	Approved/Official Due Date of Milestone	'[Milestone] completed'	'[Milestone] completed(- First Submission)'	Official Due Date of Milestone	Actual Completion Date	<ul style="list-style-type: none"> Major Amendment (At Risk) Minor Amendment Satisfactory 	Committee	0.167 for MR 1.000 for DR etc.
Amendment of Milestone	Actual Completion Date of 1st Submission	'[Milestone] completed'	'[Milestone] completed - Amendment'	Due Date of Amendment	Actual Completion Date of Amendment	<ul style="list-style-type: none"> Major Amendment (At Risk and RCPC) Minor Amendment (At Risk) Satisfactory 	Blank	0
Research Candidate Progress Committee (RCPC) review	Actual Completion Date of Amendment	'[Milestone] completed'	'[Milestone] completed - RCPC'	Due Date of RCPC	Actual Completion Date of RCPC	<ul style="list-style-type: none"> Not Satisfactory (Termination) Satisfactory 	Blank	0

All postponed items must be marked with 'Committee'. To manager its reminders manually, mark every item as 'Committee'. The Action Date (email date) and Expected Completion Date (due date) need to be updated to reflect the postponement. The Expected Completion date will appear in the email body as the due date. The Action Date for 'completed' item should be updated to the Postponed Due Date (the same as the Expected Completion Date in the reminders), while the Expected Completion Date should remain as the original due date generated by the system.

Any milestone item requiring **manual processing** must be marked as 'Committee' in the Completion Details tab of that Significant Date item. If an entire milestone must be manually managed, all four items must be marked as 'Committee'. If an entire candidature must be manually managed, only the 'Special Consideration Requested' box needs to be ticked in the Progress tab of the candidature record.

Make sure all **non-current and submitted candidature records** have all Milestone Significant Date items with Active 'To Send' emails removed.

4 Click  to save. Summary lines for each entry are displayed on the **Significant Dates** related data section of the **Postgraduate Entry** screen.

Follow the steps below to set up an email. Otherwise, close the candidate record.

To set up an Email

5 Enter email recipients

All emails are to be set up with the following sender and recipients:

From: SGR (sgr@rmit.edu.au)

To: Core Person (The student's email address)

CC: Supervisors (Emails of all active supervisors linked to the Candidature record)

BCC: SGR (sgr@rmit.edu.au) so a copy of the actual email is saved in gmail and can be easily forwarded when required.

Subject: Event Title - Candidature ID

(See screenshots in Appendix III.)

Module Identifier: RM4SDAT.CPARENTTYPE='56' (This must be defined for the feeder)

Note 1: Templates are set up on ResearchMaster. Any change to the template will result in changes in future dated emails after the feeder is run.

Note 2: A database table has been set up for possible changes to the Receipt types. Existing emails must be batch updated by the DBA using SQL. New Sig Date items will be set up by the system with the new receipt types.

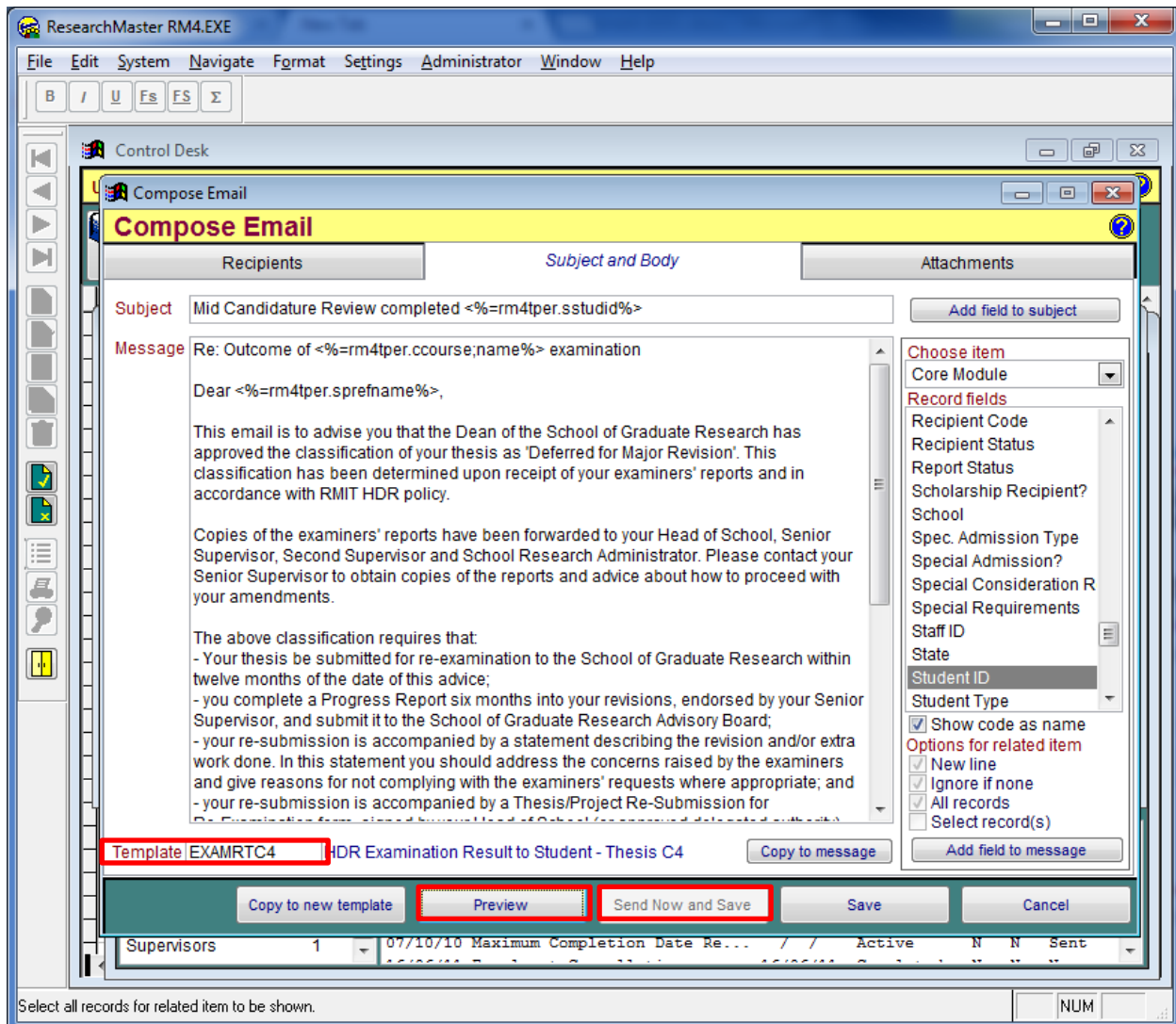
The screenshot shows the 'Compose Email' interface with the following details:

- From:** SGR (School of Graduate Rese: <sgr@rmit.edu.au>)
- To:** Core Person
- Recipient list:** Core Person, Student
- CC:** Supervisors (Filter: LACTIVE=1)
- CC list:** Supervisors %LACTIVE=1, All Active Supervisors listed on RM
- BCC:** RME Person (School of Graduate Rese: <sgr@rmit.edu.au>)
- BCC list:** SGR, School of Graduate Research

Buttons at the bottom: Copy to new template, Preview, Send Now and Save, Save, Cancel.

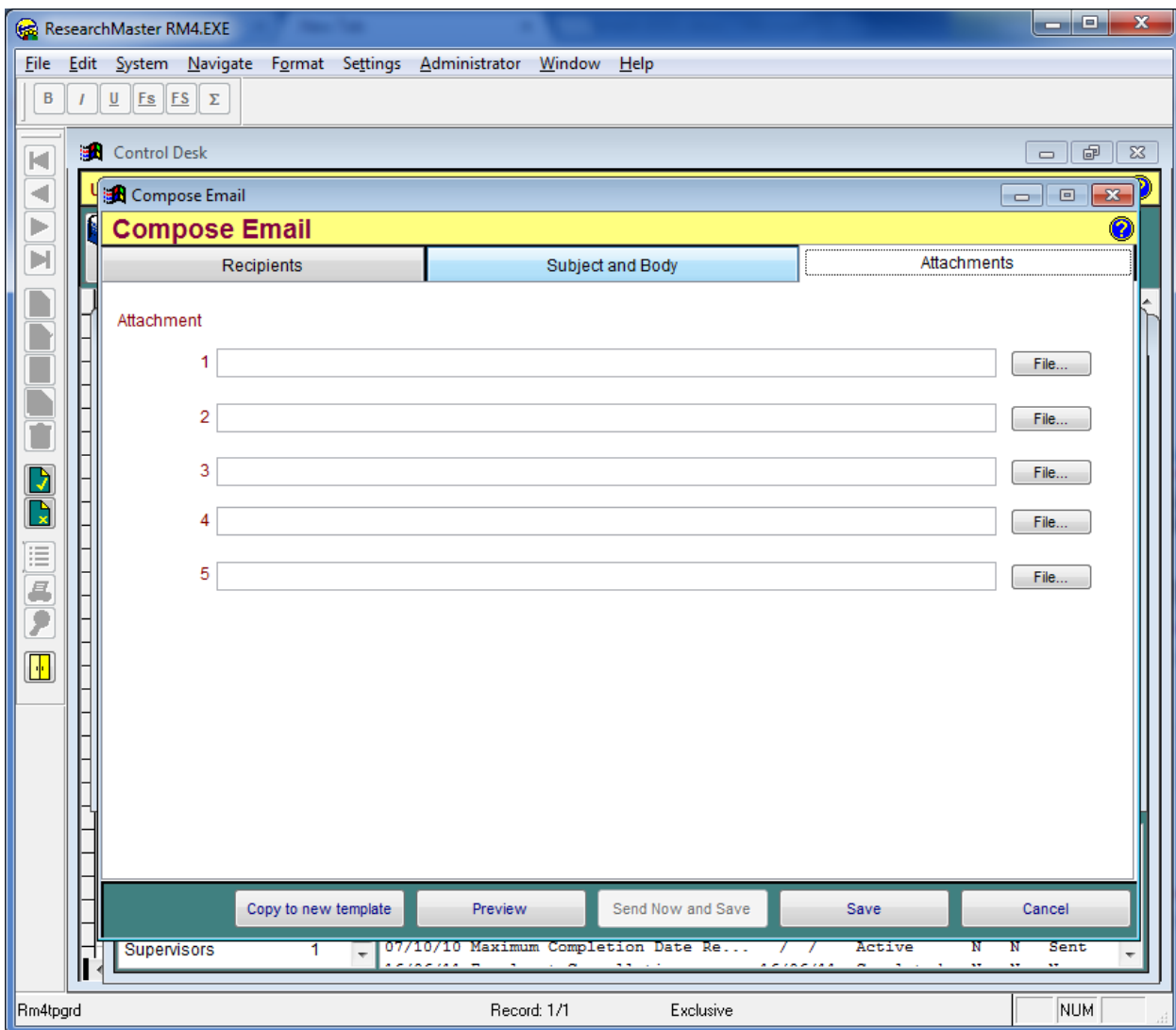
6 Compose an email

Enter Template code in the Template field and click the 'Copy to message' button. The contents will be displayed in the Message field. Mailmerge fields will display as codes. To preview the email for this specific Significant Date item, click the 'Preview' button.



7 Attach documents to the email

Email attachment function is only available to documents saved under K:\R and I. SGR to advise if any attachment need to go with the email. Generic attachments can be set up as part of the templates.



8 Send the email

To send out the email immediately click 'Send Now and Save'. To leave the email for the mailer daemon to send out the email within the day, click 'Save'.

To set manual override flags

The following flags may be set up to stop Milestone Significant Date Items from being updated by the RM feeder.

3.2.1 Candidature Exclusion Flag

Checking 'Special Consideration Requested' serves as a flag for manually managing all milestones of a particular candidature record.

The screenshot shows the 'Postgraduate Entry' window for 'Ms Test HDR'. The 'Special Consideration Requested' checkbox is checked and highlighted with a red box. Other visible fields include: Original Study Mode (Full-time), Enrolment (01/01/2010), Start (01/01/2010), Min. Completion (02/06/2012), Funded Completion (26/05/2015), Non RTS Completion (26/05/2015), Max. Completion (26/05/2015), Completed (//), Total Leave (days) (336), Extension Requested (unchecked), Extension Approved (unchecked), Extension From (//), and Extension To (//). Funding details show Prior Load (0.000), Start Load (1.000), Present Load (1.000), Consumed Load (3.524), and Balance (0.476). The Special Admission Type is 'Not Specified' and the Full-time Report Status is 'Not Specified'.

3.2.2 Significant Date Exclusion Flag

Marking 'Responsibility' as 'Committee' against the '... completed' milestone event Significant Date serves as a flag for manually managing a particular milestone. This should stop all reminders and stop the system updating the dates on this record and all of its reminders.

The screenshot shows the 'Significant Dates' window for 'Ms Test HDR'. The 'Responsibility' dropdown menu is set to 'Committee' and is highlighted with a red box. Other visible fields include: Completion Notes (empty), Assessors (Committee), and EFTS (0.000).

Appendix

1 Candidature active in a Masters by Research program (Program Code MR...RTS)

Significant Date Type Code	Event	Date of Action (Milestone EFTSL)	Est. Completion Date (Milestone EFTSL)	Completion Date	Status	Email Template
COCRMD	Confirmation of Candidature reminder	2/12	4/12	Null	Active	0000015253 COCRMDT1
COCRMD	Confirmation of Candidature reminder	3/12	4/12	Null	Active	0000015253 COCRMDT1
COCRMD	Confirmation of Candidature reminder	4/12	4/12	Null	Active	0000015254 COCRMDT2
COCCOMP	Confirmation of Candidature completed	4/12	4/12	Manually entered	Active	Manual
MCRRMD	Mid-Candidature Review reminder	8/12	12/12	Null	Active	0000015255 MCRRMDT1
MCRRMD	Mid-Candidature Review reminder	10/12	12/12	Null	Active	0000015255 MCRRMDT1
MCRRMD	Mid-Candidature Review reminder	12/12	12/12	Null	Active	0000015256 MCRRMDT2
MCRCOMP	Mid-Candidature Review completed	12/12	12/12	Manually entered	Active	Do not attach email
CSRMD	Completion Seminar reminder	18/12	22/12	Null	Active	0000015259 CSRMDT1
CSRMD	Completion Seminar reminder	20/12	22/12	Null	Active	0000015259 CSRMDT1
CSRMD	Completion Seminar reminder	22/12	22/12	Null	Active	0000015260 CSRMDT2
CSCOMP	Completion Seminar completed	22/12	22/12	Manually entered	Active	Manual
TPSRMD	Thesis/Project Submission reminder	18/12	24/12	Null	Active	0000015257 TPSRMDT1
TPSRMD	Thesis/Project Submission reminder	22/12	24/12	Null	Active	0000015257 TPSRMDT1
TPSRMD	Thesis/Project Submission reminder	24/12	24/12	Null	Active	0000015258 TPSRMDT2
TPSCOMP	Thesis/Project Submission completed	24/12	24/12	Manually entered	Active	Manual

2 Candidature active in a Doctorate by Research program (Program Code DR...RTS)

Significant Date Type Code	Event	Date of Action (Milestone EFTSL)	Est. Completion Date (Milestone EFTSL)	Completion Date	Status	Email Template
COCRMD	Confirmation of Candidature reminder	6/12	12/12	Null	Active	0000015253 COCRMDT1
COCRMD	Confirmation of Candidature reminder	9/12	12/12	Null	Active	0000015253 COCRMDT1
COCRMD	Confirmation of Candidature reminder	12/12	12/12	Null	Active	0000015254 COCRMDT2
COCCOMP	Confirmation of Candidature completed	12/12	12/12	Manually entered	Active	Manual
MCRRMD	Mid-Candidature Review reminder	18/12	24/12	Null	Active	0000015255 MCRRMDT1
MCRRMD	Mid-Candidature Review reminder	21/12	24/12	Null	Active	0000015255 MCRRMDT1
MCRRMD	Mid-Candidature Review reminder	24/12	24/12	Null	Active	0000015256 MCRRMDT2
MCRCOMP	Mid-Candidature Review completed	24/12	24/12	Manually entered	Active	Do not attach email
CSRMD	Completion Seminar reminder	30/12	36/12	Null	Active	0000015259 CSRMDT1
CSRMD	Completion Seminar reminder	33/12	36/12	Null	Active	0000015259 CSRMDT1
CSRMD	Completion Seminar reminder	36/12	36/12	Null	Active	0000015260 CSRMDT2
CSCOMP	Completion Seminar completed	36/12	36/12	Manually entered	Active	Manual
TPSRMD	Thesis/Project Submission reminder	42/12	48/12	Null	Active	0000015257 TPSRMDT1
TPSRMD	Thesis/Project Submission reminder	45/12	48/12	Null	Active	0000015257 TPSRMDT1
TPSRMD	Thesis/Project Submission reminder	48/12	48/12	Null	Active	0000015258 TPSRMDT2
TPSCOMP	Thesis/Project Submission completed	48/12	48/12	Manually entered	Active	Manual