Help guide **Creating forms in Research Master**

As a student, you begin by creating a new form, completing it and uploading any relevant documentation.

Each form has a series of common sections relating to your candidature and your sign-off, as well as specific fields relevant to your requested changes. Some information is automatically pre-filled based on your current enrolment details, while you are required to fill in other relevant bits of information.

You can track the status of your form as it progresses through the process.

The Process

Most forms progress through a series of checks and approvals. After submission, each reviewer has the opportunity to sign-off on the form and advance its progress to the next stage, or send it back to the student/previous reviewer with comments for further clarification or revision.

A typical workflow might look something like:

1. Student (submission)
2. Supervisor (review)
3. Faculty Research Officer (review)
4. Research A Officer (review)
5. Graduate Research School (administration)

After submission, you may receive your form back for adjustment. See the page <link> ‘Managing Existing Forms’ for further instructions.

Creating a New Form

There are four forms currently available online:

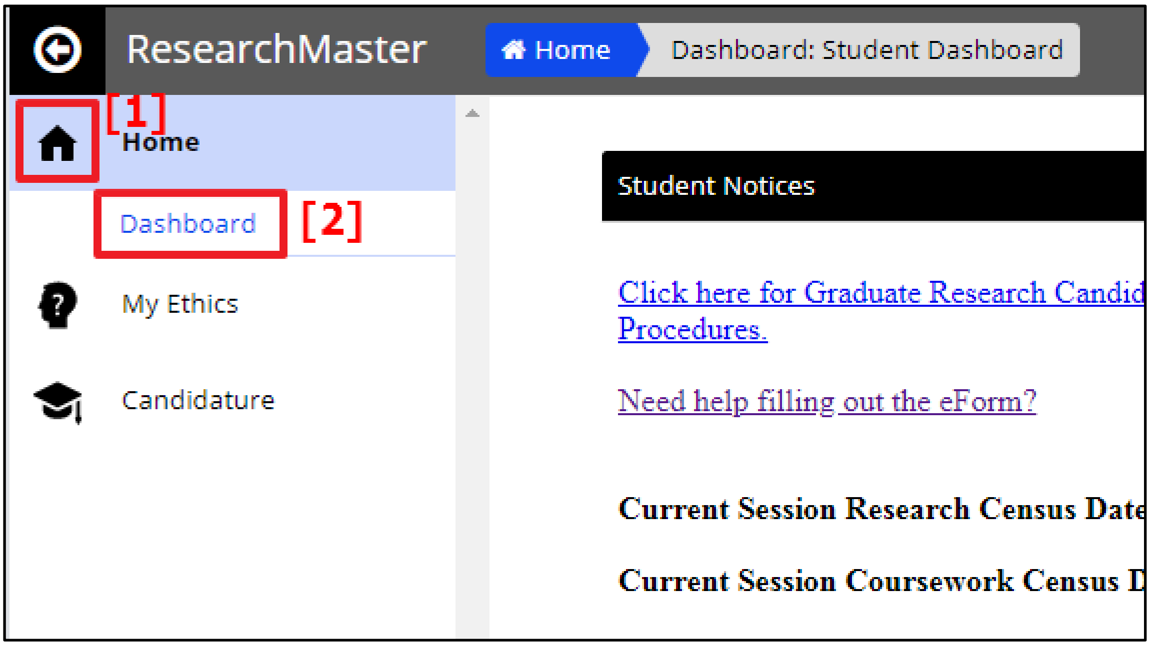
- Extension of Candidature
- Change of Thesis Title
- Change of Residency
- Change of Study Load

There are two places you can create a new form from:

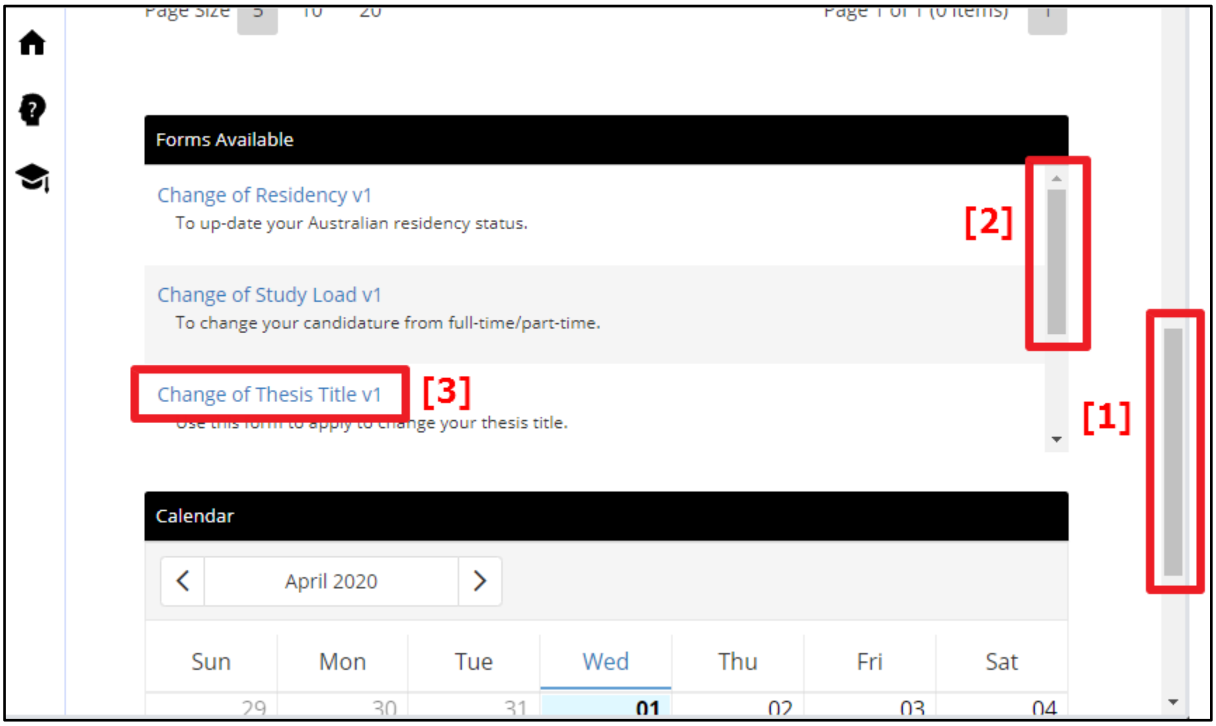
1. The Dashboard shortcut
2. The Candidature - Course Variations page

Method 1: From the Dashboard

You create a new form directly from the Student Dashboard.



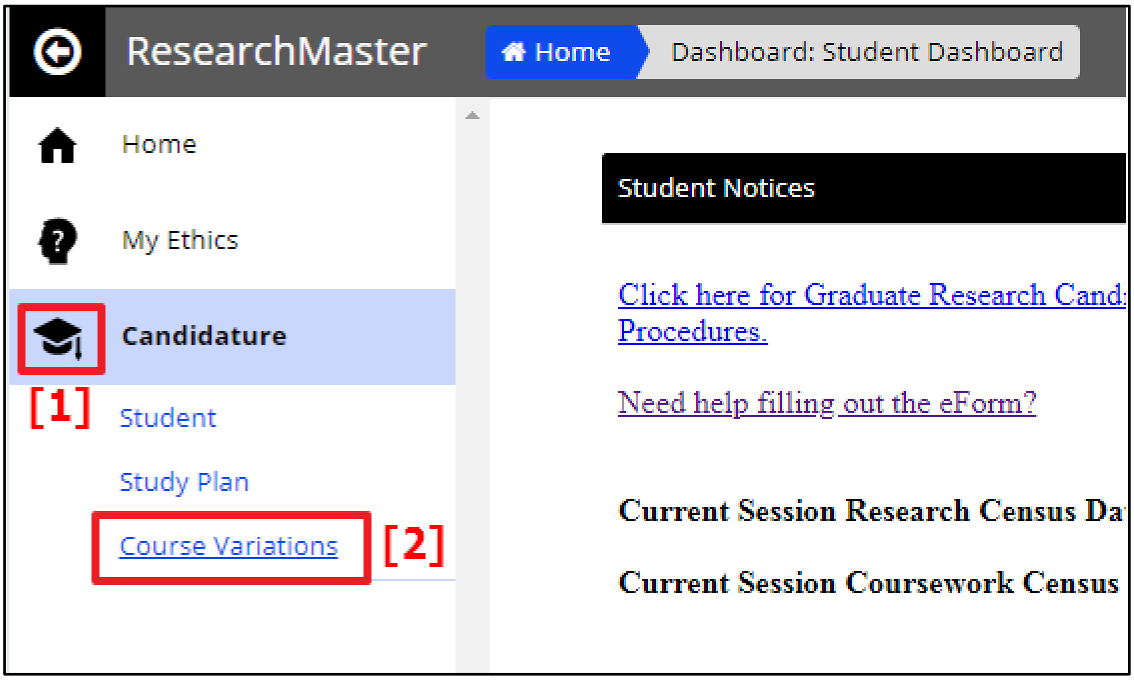
Your Dashboard appears when you first login, or you can get to it any time by clicking on the 'Home' icon [1] in the left navigations bar, then selecting 'Dashboard' [2] from the expanded menu.



From the Dashboard, scroll down [1] until you see 'Forms Available'. Note that this widget only displays a few options at a time, so you may need to scroll down within Forms Available [2] to find the form you want.

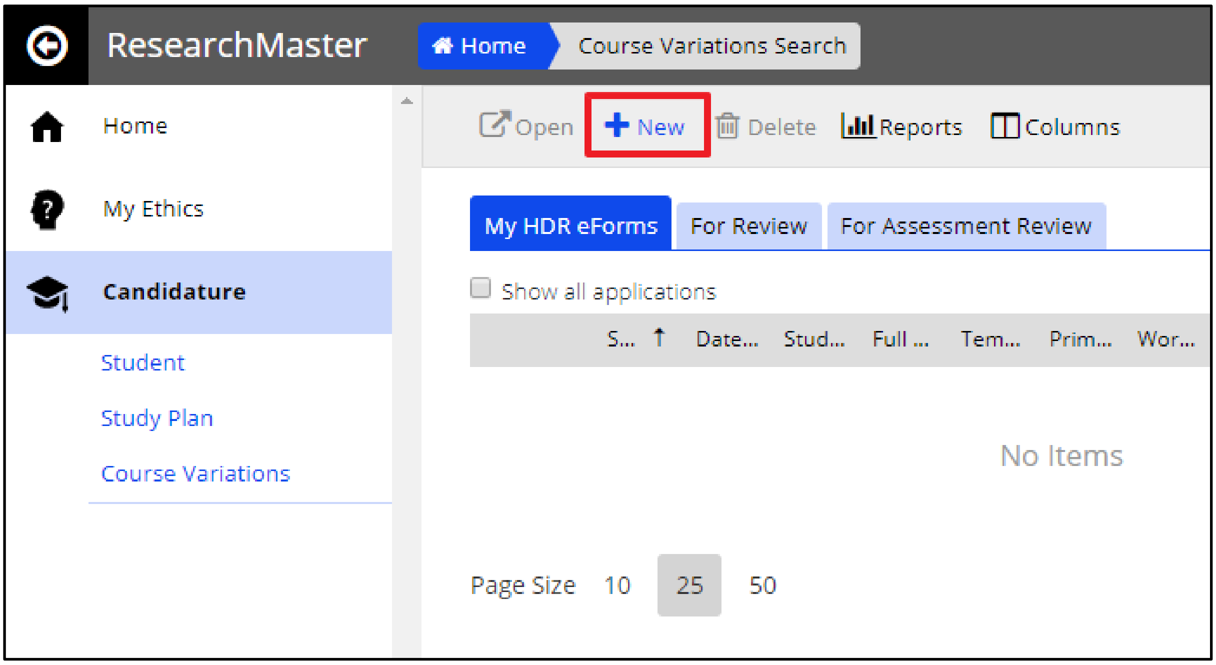
Method 2: From the Candidature - Course Variations page

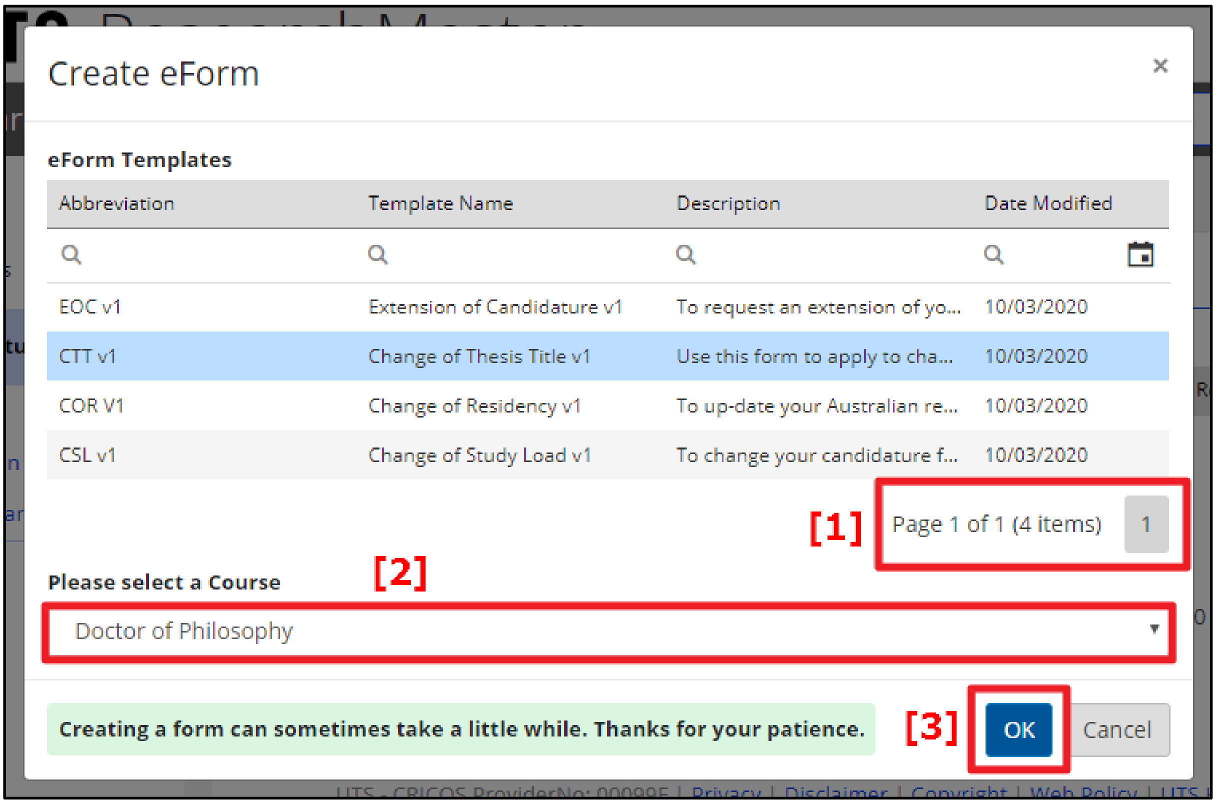
You can also create and manage existing forms from the Course Variations page under 'Candidature':



You can get to 'Course Variations' any time by clicking on the cap icon [1] on the left navigation bar, then selecting 'Course Variations' [2] from the expanded menu.

From the 'Course Variations' screen, click on 'New':





From the ‘Create eForm’ screen, select the form you want to create. If you can’t see your form it may be on another page [1].

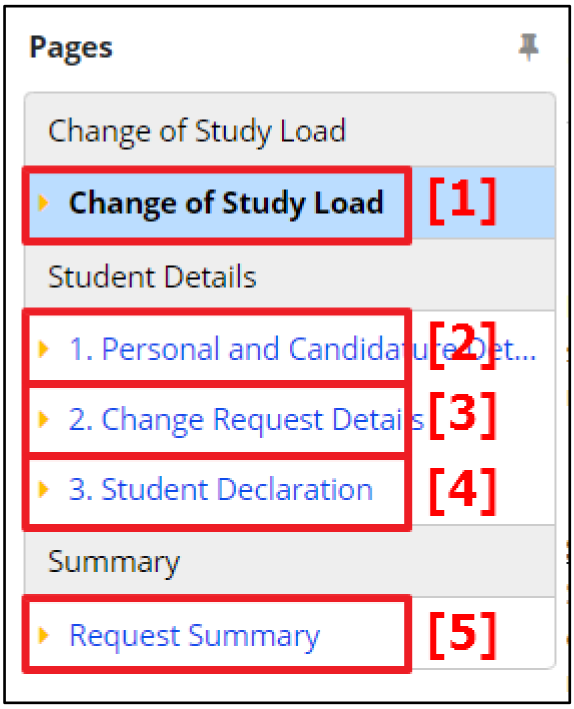
Your Course should be pre-selected, and not require any changes [2]. If your Course does not appear here, please contact the Graduate Research School (GRS).

Once you have selected your desired form, click OK [3] to begin filling it out.

Filling Out a Form

Pages Overview

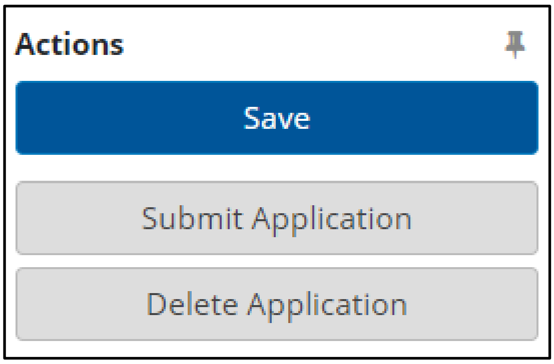
Forms share a common layout. Each form will have a Pages navigation menu on the left-hand side, which you can use to jump between different sections:



1. **Form overview** - this page contains additional help and instructions specific to this form
2. **Personal and Candidature Information** - This information should be pre-filled - just confirm that the details are correct, and move on to the next page
3. **Change Request Details** - This is where you fill in all relevant information, and upload any supporting documentation
4. **Request Summary** - an overview of your request, as well as notes from any reviewer

Actions Overview

You'll find the Actions panel in the top right-hand corner of your form:



1. **Save** - this allows you to leave your form, and return to it to complete at a later stage. You do not need to Save before you Submit.
2. **Submit Application** - this sends your form off to your reviewer, and prevents you from any further changes. You will be asked to confirm your submission via a pop-up.
3. **Delete Application/Withdraw Application** - you can only Delete or Withdraw an application if you have edit access in the [link] Workflow State. If the form has been submitted and is with a supervisor or reviewer, you will not be able to cancel it yourself.

Compulsory Fields

Compulsory fields are marked with a red asterisk [1]:

Previously completed pages will be marked with a green tick [2] on the Pages navigation menu. If you have missed any compulsory fields, the page will be marked with a red exclamation mark [3] when you try to leave. You'll find any missed sections highlighted [4].

Getting Help

In addition to these guides, you can find in-context tips and support wherever a blue question-mark icon appears: