

Je-S

## Je-S - Joint Electronic Submissions Managing RCUK Funded Students' Records



### Contents

Je-S Log in link.....	2
Creating a Je-S Account for managing UKRI Studentship Records .....	2
Creating new student records .....	2
Managing current student records.....	5
Je-S Help .....	5
Studentship Submission Survey – Hints and Tips .....	6
UKRI Research Council Specific Guidance and Studentship Terms & Conditions.....	13

## Je-S Log in link

## Creating a Je-S Account for managing UKRI Studentship Records

Click on the following link to create a Je-S account:

<https://je-s.rcuk.ac.uk/JeS2WebLoginSite/TermsConditions.aspx?mode=accountsetup>

Scroll through the terms and condition > click 'Accept'.

Ignore any references to setting up an ORCHID account.

When selecting the Account Type the screen shot below should cover most of the options you're likely to need (if there are any other roles you'll need, these can be added by the PGR Service):

The screenshot shows a web browser window with the URL <https://je-s.rcuk.ac.uk/JeS2WebLoginSite/CreateAccount.aspx>. The page title is "Create Account - Account Type". On the left, there is a navigation menu with "Help", "Contact Us", "Terms and Conditions", and "System Help". The main content area is titled "Account Type" and contains the following sections:

- Research Proposals**
  - An Applicant on a Standard or Outline Proposal (Principal/Co-Researcher/Co-Investigator). This account type requires verification from the nominated organisation and is not applicable to an Applicant on a Fellowship Proposal.
  - An Applicant on a Fellowship Proposal.
- Studentship Forms**
  - The Student (on a Student Nomination or Studentship Proposal Document, this is the only account type that applies for students).
  - The Supervisor
  - Head of Department
  - A Contact
    - AHRC BGP
    - BBSRC Industrial CASE
- Administration**
  - To Prepare Documents, but not be named on it eg. Departmental Administrator
  - To Approve and/or Submit Research Proposals, Student Nomination/Proposal Forms or Ten Day Turnaround
  - To Complete/Approve and/or Submit Financial Forms eg. Expenditure Statements/Intent and Offer Acceptances/Start Confirmation/Annual Statements on behalf of the Organisation
  - DTG Co-ordinators
  - DTG Administrators
  - Other eg Peer Reviewer/College Member/Named Researcher/PI Response

At the bottom, there are buttons for "Back", "Next step", and "Cancel". A red arrow points to the "To Approve and/or Submit Research Proposals..." checkbox in the Administration section.

Step by step instruction can be found here - <https://je-s.rcuk.ac.uk/Handbook/pages/SettingupaJeSaccount/SettingupaJeSaccount.htm>

## Creating new student records

- **Documents > Functions > Create > New document** for creating new student record. New students must be added within **1 month** of funding commencing. (Students can create a basic record themselves, completing only the 'Person Details'. Inviting students to create an account within Je-S can save some data inputting but may also result in poor data quality).

Be aware that a student may already exist within the system if student has previously received funding with UofG (**record continues**) or funding under another scheme for a previous course of study (**new record required**).

- Select Council
- Select Document Type > Student Details (not be confused with Studentship Proposal!)

- Select Scheme – It is extremely important that this is correct. If you are unsure you can look back on other current students' records or check the relevant Research Council website for current funding schemes. Be aware if funding scheme is changed after the record has been created it generate a duplicate record. Duplicate records can be deleted by navigating **Documents > Students > Studentship Details Batch Update > Delete studentship details documents**, then search for the student either by surname or student reference. Select the record to be deleted, using the check box then hit 'Delete studentships'. (If you do not have the option to delete, please contact the PGR Service to do this on your behalf).
- Ignore 'Select Call/Type/Mode (optional)' as this is only used for Grant/Studentship proposals.
- Don't use browser buttons to navigate. Use side menus or Previous/Next buttons within Je-S.
- Avoid sloppy data inputting – ensure proper nouns are capitalised, use name as recorded in MyCampus, ensure Student Number included.
- When a student record has been completed > **Submit Document**. This then comes to PGR Office team for approval. We can return for correction or submit to the relevant Research Council. Note: When submitted the student record may temporarily disappear from main student list.
- Student records can be updated anytime. Each time PGR Office needs to approve via the Je-S system.
- Each Research Council has slightly different layouts and required fields. Clicking on the blue question mark next to each sub-section brings up a help guide.

Note navigation buttons along the top of each screen within a student record. **As you complete each section listed on the left-hand side of the student record you should hit 'Save'.**

#### **Student Record Subsections:**

- **Person Details** – It is important that the student's name appears as it is in MyCampus. Can use '*Preferred form of address*' if known by another name. Not all information is required. System will prompt you to complete necessary info. Important to include '*Nationality*'.
- **Qualifications and Relevant Experience** – Record all UG/PG qualifications held. *Note system does not recognise Scottish MA UG qualification, therefore chose BA instead.*
- **Researcher Training Dates** – Registration Date (time commenced current program of funded study) and Funding Date (start of funded period) usually the same unless funding has commenced in the 2<sup>nd</sup> year of PhD study (or part-time equivalent). The UKRI convention for funding starting date is 1 October including Masters students. You will need to be aware of length of funded period/Research Council expected submission deadlines. **It is important that funding/submission end dates are kept up to date! If it has changed in MyCampus it needs to be changed in Je-S too where the change conforms to UKRI terms and conditions.**
- **Termination Details** – used if student ends studentship early.
- **Funding Details** – Records stipend/fees for each year of funding. Must be kept up-to-date to reflect changes to part-time status, periods of suspension due to internships/maternity/illness. Important information is correct. Part-time is usually assumed to be 60% (3 days) at UofG. Note for part-time students stipend is usually paid at 60% but fees are charged at 50%.

- **Project Details** – Title needs to be kept up to date.
- **Research Training Details** – AHRC, statement regarding research environment, training courses and facilities.
- **Ethical** – All research should be subject to ethics review. Information can be copied and pasted from existing records regarding the Ethical Review process in your area.
- **Research Organisation** – 2 points to consider – where is the student registered as a student and who holds the funding grant? If student is registered at Glasgow we are ‘Degree awarding institution’. If we are responsible for maintain Je-S records we are ‘Submitting RO’. Important that if we hold grant that the correct grant is selected. Can refer to other recent records to compare. ESRC funded students under the current funding scheme will have both Glasgow and Edinburgh listed. Glasgow is Submitting Organisation but Edinburgh holds grant. For records where another institution is noted you will see Glasgow being listed as grant holder but other institution as submitting organisation ie for AHRC funding. Start/End Dates should match Funding Start/End dates on Reseacher Training Dates. Supervisor details should be kept up to date. If you can not find a grant listed, it is usually because it is held by another university. Googling the grant reference is the quickest way to track this down if you’re not sure!
- **Project Partner Organisation Details** – used with CASE (Collaborative Awards in Science & Engineering) studentships for external partners.
- **Document Header – HUSID (HESA unique student identifier)**  
Any student who has already had a FE career (undergraduate, PGT or otherwise) will already have a HUSID number generated within MyCampus. New students to the University generally have a number allocated to them by the December of the year they start. The HUSID number can be looked up in MyCampus as follows:  
**MyCampus>Main Menu > Campus Community > Personal Information (Student) > Identification (Student) > External System ID**  
Enter the student number and then select ‘View All’ to expand. The HUSID number is about halfway down. HUSID numbers can be entered in bulk in December (make a diary note) using Bulk Update tool.  
*NUMHUS* – not currently required. Refers to number of individual periods of study. Not currently recorded on MyCampus and can be problematic to work out if don’t have complete student academic background information. Leave blank.  
*Your Reference* – required. Usually student number if no other local reference system is used. Don’t put your name. Administrator names are recorded in Document History.  
*Student Reference* - student number only please!
- **Classification** - Some research councils ask for research to be classified. Use common sense/get input from supervisor where not clear.

**When document is completed there should be no red Xs down the left hand side menu.**

The system will prompt you if anything is missing, if dates do not match up or if you’re creating a duplicate record. If everything is OK hit ‘**Submit Document**’. The PGR Office will receive a notification, do a quick check, and then submit record to the Research Council or will return the record for correction. Student records can be updated at any time. Each time you must select ‘Submit Document’.

## Managing current student records

### **Documents > Students > Studentship Details Batch Update > List Studentships**

Use the **Filter** to select records for example by Research Council, Start year, Academic Year (all students funded during a particular year). To search by student surname, selection 'Additional Filter > Surname (**you may need to tab out of Additional Filter for it to work in some browsers**).

Can sort results by any of the headings and download as a spreadsheet if required.

Students funded by grants held and managed by UofG but registered at other universities also will also be visible in Je-S.

**Batch Update** – can update HUSID, annual funding (stipend and fees) and funding end dates in bulk.

**Document Actions** – Preview Document allows you to view the whole student record at once. You can also download as a PDF using the Print Document option.

**Display Document History** – shows who has been involved in processing the document.

## Je-S Help

The PGR Service can answer most queries with records, however for technical issues please contact the Je-S Helpdesk:

- Email: [JeSHelp@je-s.ukri.org](mailto:JeSHelp@je-s.ukri.org)
- Phone: +44 (0) 1793 44 4164 –

## Studentship Submission Survey – Hints and Tips

### Preparing for the Survey

#### Prior to the Survey

The survey is a snapshot of the data taken at the time the survey is launched and is drawn from the information entered via the Studentship Details functionality in Je-S. The survey is normally launched mid-October and runs to the beginning of December annually. The details within the survey cannot be amended therefore it is essential that extensive checking of Expected Submission Dates is undertaken before the records are locked.

Access to the Survey functionality is controlled by the UofG Master Account and the PGR Service can grant the access rights to complete PhD Submission details.

The survey presents the students by Department. This is determined by what was selected in the 'Research Organisation' section of the student record.

Once a Department list has been completed the PGR Service will hit the 'Sign off this department's updates' button. Once the button has been hit, the records disappear apart from individuals that are still to submit or be awarded. The PGR Service will copy the data prior to signing off in order that UofG's submission rate can be calculated. If there is an issue with one of the records (fails validation) the Department list cannot be submitted.

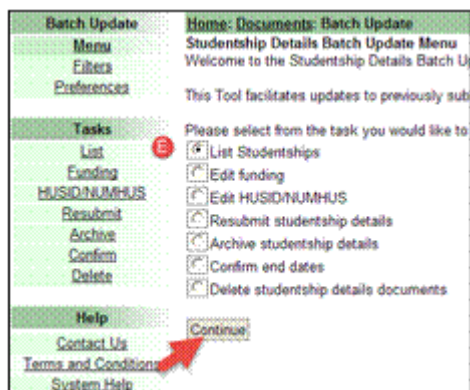
To minimise issues, check the Studentship Details in the Batch Update before the survey opens to ensure the correct students get captured in the survey (Expected submission dates 1/10/XX to 30/09/XX).

Make sure you have the right Filters applied to display the information.

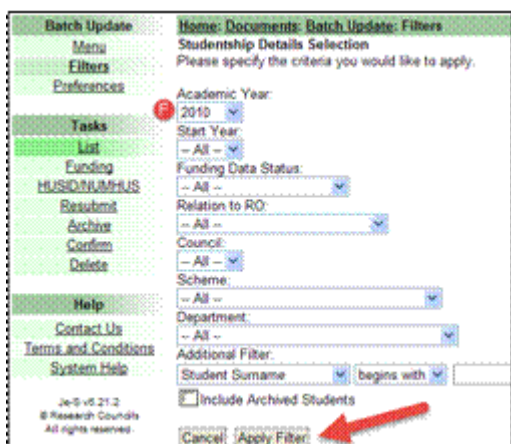
A- Select **Preferences** from the Document Menu B - Select the categories to be displayed

C- Save the selected criteria D - Select the **Filter** option

A. Select the **List** view and **Continue**



B. Select the **Academic Year** or **All** option. Apply the Filter. If selecting a year then it would be advisable to include a **check on 4-5 Academic Years prior to survey year** in question.



- C. Click on the Column heading to order the display of information. Clicking again will reverse the order.
- D. The information can be exported to a spreadsheet (useful if large numbers of studentships returned).
- E. Indicates when the studentship details were last submitted to the Council.
- F. If any details need amending, select **Open** to edit the studentship details.

The screenshot shows the 'Batch Update: Filters: List' interface. At the top, there are buttons for 'Save list as spreadsheet' and 'Academic year: 2010 (112 students)'. Below is a table with columns: Student Name, Start Year, Council, Scheme, Start Date, End Date, Expected Submission Date, Last Submitted, Updated By, and Updated Date. The table contains three rows of data. A red circle 'H' is next to the 'Save list as spreadsheet' button, a red circle 'J' is next to the 'List' button, a red circle 'G' is next to the 'Expected Submission Date' column header, and a red circle 'I' is next to the 'Last Submitted' column header.

Student Name	Start Year	Council	Scheme	Start Date	End Date	Expected Submission Date	Last Submitted	Updated By	Updated Date
Open	2008	EPSRC	EPSRC Standard Research Student (DTG)	29-Sep-2008	30-Sep-2011	30-Sep-2012	04-Feb-2013 14:15		24-Dec-2012
Open	2008	EPSRC	EPSRC Standard Research Student (DTG)	29-Sep-2008	30-Sep-2012	30-Sep-2013	27-Oct-2011 13:47		15-Dec-2014
Open	2007	EPSRC	EPSRC Academic Fellowship	01-Sep-2007	31-Aug-2012	01-Sep-2011	30-Nov-2007 03:28		14-Sep-2009

- A. Within the studentship details record (See fig on page 4), the Expected Submission Date can be amended in the Researcher Training Dates section
- B. Select Edit
- C. Amend the details of the expected submission date to either include, or remove, from the survey date parameters. (please do not amend the expected submission date to a date

earlier than 01/10/XX – otherwise this will prevent the student from being picked up in this year’s, or any subsequent, survey)

Remember to **Save** and then **Submit** the Studentship Details.

In some cases, there may be up to three organisations involved in administering a studentship: e.g. a student is registered at one organisation, has supervision from a second and is funded from a training grant to a third. The studentship details should have only been recorded once within Je-S and should therefore only appear in the survey against one of the Ros.

The student will appear in the survey for the RO which has taken responsibility for submitting the details. However, if the student should appear in another of the associated ROs then ensure the Tick box is amended:

Within the Studentship Details select **Research Organisation** from the Document Menu

Ensure the correct RO is indicated (*see screenshot below*), if not then edit the detail.

Name	Please indicate if this is the degree awarding organisation?	Submitting RO?	Supervisor
<a href="#">edit</a> University of Reading		Y	
<a href="#">edit</a> University of Bristol	Y		

**NOTE:** there is an issue affecting visibility of the student details in Je-S in instances where a Student record is submitted by one RO with another RO being the degree awarding organisation. The organisations can be added in any order however it is the **order of the markers that are applied that will determine future visibility** in Batch Update.

- A. The organisation that is responsible for submitting the document must have its marker applied first.



<input type="checkbox"/> Is this the degree awarding organisation? <input checked="" type="checkbox"/> Is this the submitting RO ? (Tick this box if
---

- B. The degree awarding organisation should have their marker added second.  
 C.

<input checked="" type="checkbox"/> Is this the degree awarding organisation? <input type="checkbox"/> Is this the submitting RO ? (Tick this box if
---

- D. When the markers have been applied in this order it will ensure visibility to both organisations when viewing the student in Batch Update.  
 E.

However, there is no easy way of telling within Batch Update what order the ticks were applied so both the organisations should be deleted from the document. They can then both be re-added, and the markers then applied in the correct order. Please note that deleting and reapplying only the markers will not resolve the issue.

Add New Organisation			
Name	Is this the degree awarding organisation?	Submitting RO?	Supervisor
<a href="#">edit</a> Zorg Testing Organisation for JeS 1	Y		Dr AN Othe <a href="#">delete</a>

If your organisation has several records that would need deleting, please follow these instructions:

- Log into your account
- Select 'Studentship details batch update'
- In the Menu change the default from List Studentships to 'Delete Studentship details documents'.
- Select 'Continue'
- Search for the student using the filters
- Place a tick in the check box
- Select 'Delete studentship'

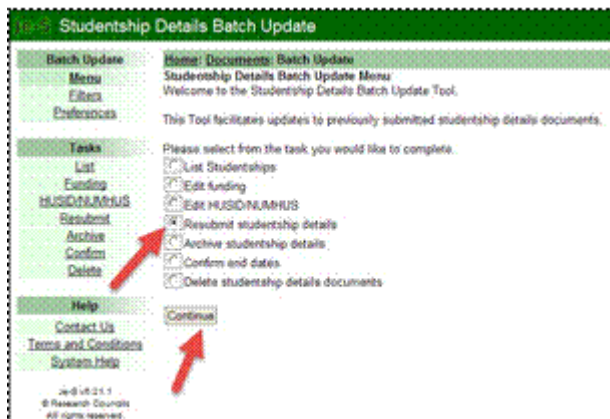
Remember to **Save** and then **Submit** the Studentship Details.

If a student terminates within the 1st year then they should not be included in the survey. Please note though that if a student's dates are 1 October to 30 September then they WILL be included because this is deemed by the system to be one year. Our advice is to make the terminated date earlier eg 29 September (within the year).

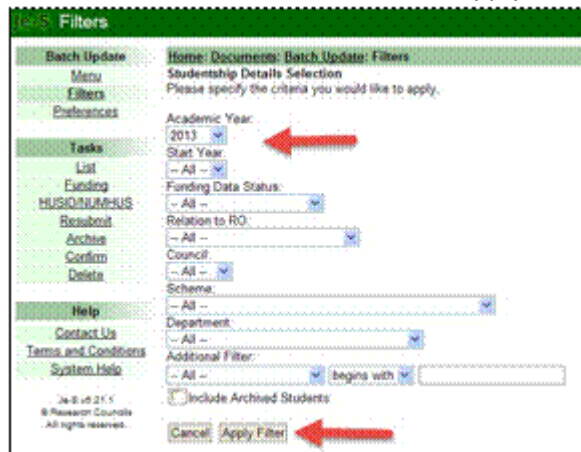
The Research Councils have requested that any records that have been edited since they were last submitted are submitted again. There is quite a high incidence of records being amended but not actually submitted, and as a result the Research Councils cannot see the updated information in the internal Grants System. It is advisable therefore to ensure the latest data is made available, for both the survey and Research Fish, if the data has not been submitted recently it is advisable to resubmit it again.

The quickest way to check when a record was last submitted, and to resubmit it, is to use the Batch Update functionality. Within Batch Update, select the **Resubmit** option either from the Document Menu (on the left hand side) or by selecting the radio button and then **Continue**.

Ensure the Preferences include the info you need (Last Submitted), even if preferences were selected for one of the other views, they may need to be selected again to set up this View.



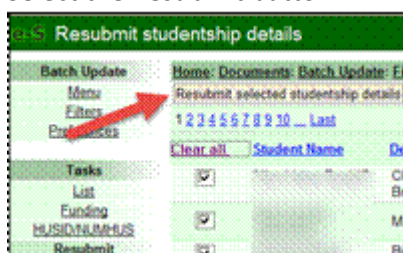
Enter the Academic Year of 20XX and Apply Filter.



Select individually or use the **Select all** option



Select the Resubmit button



If any record fails validation it cannot be submitted and will be indicated by a red cross. The validations will have to be cleared by amending the Studentship Details (This cannot be done from this screen and will have to be done via the List view).

✓	<input type="checkbox"/>	Mr
✓	<input type="checkbox"/>	Mr
✓	<input type="checkbox"/>	Mr
✓	<input type="checkbox"/>	Mr
✗	<input checked="" type="checkbox"/>	Mr
✗	<input checked="" type="checkbox"/>	Mr
✗	<input checked="" type="checkbox"/>	Mr
✗	<input checked="" type="checkbox"/>	Mr

The Resubmit option will only submit the records displayed on that page. There may be further pages in which case each page has to be submitted and records failing validation will have to be addressed.

Je-S PhD/Masters Submission Automatic logout in 1:59

Period Surveyed 01/08/2014 to 01/09/2014  
Survey Opened 15/09/2014, Survey Closes 18/09/2014

Select a department:  
Aerospace Engineering

Name	Date PhD Submitted	Qualification Awarded?	Date Masters Submitted	Date Awarded	Reason Not Awarded	Intended Submission Date	Reason for non-submission	PhD	Registration/ Appointment Date	Funding End Date	Research Council	Category
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Select **Edit** to open the studentship details and then provide the appropriate information:

Je-S PhD/Masters Submission

Period Surveyed 01/08/2014 to 01/09/2014  
Survey Opened 15/09/2014, Survey Closes 18/09/2014

Name: ~~Mr Christopher Andrew Smith PhD 1004000~~  
Intended submission date: 08/06/2014  
Registration/Appointment Date: 08/06/2010  
Funding End Date: 07/06/2014  
Category: EPSRC Centre for Doctoral Training Student (CDT)

Date PhD Submitted:

Qualification Awarded:

Date Masters Submitted:

Date Awarded:

Reason Not Awarded:

Reason For Non-submission:

**Note:** If the student record should not be included in the survey (i.e. is in error/was not picked up in the checks beforehand) then the only way to remove the record to enable the Department to be

Signed Off is to select under the **Reason for Non- Submission** the option **Delayed Submission**. The record in error should then be amended in Batch Update and, unless the expected submission date was more than 2 years ago, it will be re-presented in next year's survey.

All records have to be completed to enable the Department information to be signed off. If you wish to complete the survey later select 'Document Summary'.

Once the Department has been completed, **DO NOT** select the Sign Off option as the PGR Service will do this for all records. Please note that once this has been selected the data cannot be amended.

Last survey sign off:
<input type="button" value="Sign off this department's updates"/>
<input type="button" value="Document Summary"/>

## UKRI Research Council Specific Guidance and Studentship Terms & Conditions

### Research Council Guidelines:

[UKRI Generic Studentship Funding Terms & Conditions](#)

- [AHRC](#)
  - [Scottish Graduate School for Arts & Humanities \(AHRC\)](#)
- [BBSRC](#)
- [EPSRC](#)
- [ESRC](#)
  - [ESRC Postgraduate Funding Guide](#)
  - [ESRC Je-S Guidance](#)
  - [Scottish Graduate School of Social Sciences \(ESRC\)](#)
- [MRC](#)
- [NERC](#)
  - [NERC Studentship Handbook](#)
- [STFC](#)