ROLE(S) – Faculty Assessor (Associate Deans; MRes Directors; Department Directors and Heads; Supervisors)

NOTES: The short videos (4) of HDR_ApplicantPortal_HomeTiles.mp4, HDR_ApplicantPortal_ApplicationsOffers.mp4, HDR_ApplicantPortal_TipsTricksPart1.mp4 and HDR_ApplicantPortal_TipsTricksPart2.mp4 coincide with this document in terms of providing additional details.

The GRA Application Referral Assessor is the AMIS system role (shown below) which grants everyone access in the faculties (Associate Deans, MRes Directors, Department Heads and Supervisors) for the Applicant Portal (My Tasks; Applications & Offers and GRA Help Centre tiles). Since the Applicant Portal is shared with domestic coursework and Study Link (Macquarie International’s system), all of HDR information is prefixed by GRA and in the case of requirements (INT for Internal and Z for External).
### ACCESSING THE HDR APPLICANT PORTAL

1) Login to HDR Applicant Portal

![Login Screen](image)

Log on using OneID

**User name or email address**

**Password**

**Log On**

- [ ] Keep me logged on
- [ ] Accessibility Mode

Forgotten password?

2) Search for “gra app” and select:

“GRA Application Referral Assessor”

FYI: GRA Central will have the GRA Operations role instead
3) You have 3 tiles that are the most important here

**My Tasks** for acting on the Referrals assigned to you

**Applications & Offers** when you need to search for ones you have already forwarded onward and/or export information

**GRA Help Centre** for Manuals and Videos to guide you
SETUP of HOME SCREEN with the 3 MAIN TILES

1) You can put the three on your Home screen so that you don’t need to search in the future

2) The **three dots** provide another menu option for “Add to Home”

You will also be able to remove in the future by the same three dots and menu option “Remove from Home”
3) Check the Home to see that this is now set. You won’t need to change this in the future.
4) If you want the older style workplace simply put the slider back to OFF for "Try New Workplace!" at the bottom of the screen.
1) During a session you can collapse each section and it will maintain this until you log out. In this example, the Application Contents is shown with each section collapsed. The highlighted sections make it easier to find the two key areas of **Assessment Recommendation** and **Requirements**.

The left side represent the sections while the right side is specific to the one highlighted (Application Contents)
2) **Requirements** section on the left side is the same as the **Requirements** section in **Application Contents** as shown above.

The Application Requirement ID column header can be clicked on and will sort A to Z or Z to A (toggle). This is the grid view which is the menu option shown in the upper right corner (3 dots).

**INT prefix** = Internal (staff only)

**Z prefix** = External (displayed to applicants for their responses)
NAVIGATION (GRID VIEW versus CARD VIEW) – MY TASKS

1) There are two views grid and card view that can be changed in the top right corner (3 dots) as shown
2) The card view can be useful for some screen areas. Shown here is the **Requirements** where the icon shown distinguishes Internal (INT) versus External (EXT).
SEARCHING / FILTERING – Applications & Offers

1) Depending on what you want to search and/or filter you go into that section: Applications; Application Contents; Offers and Referrals.

Application Contents and Offers have pre-built system Saved Views which are discussed in detail in that section.

2) Both the search and filter work together. Usually there are two actions where you either put the search criteria in and then click on the search button to get the results. You start by going into the section that you want to see (Application Contents, Offers and Referrals will be the main ones for the faculties).

Step #1: select the Saved View and/or put in your own criteria.

Step #2: click on the Search button to see the results.
3) You can also use the Filter to further refine your results.

You can select the **filter button**

![Filter button](Image)

to toggle between showing and hiding this.

The arrow sections are toggles as well between collapsing and uncollapsing (the Submitted one is shown which is un-collapsed)

Keep in mind the following that dependent on the section above (Applications, Application Contents, Offers and Referrals) you will have different filter options.
4) Using the **Search Reset** and **Clear All for the Filter** sometimes helps to start over when selecting different search options.

5) Access to the Requirements is in the Referral section once a Referral is forwarded to another staff member. The other sections (Applications; Application Contents and Offers) only have summary information. All of these sections are read only once the referral has been assessed and forwarded and/or finalized.
1) You can group results by dragging a field into the header. You can put the results back by dragging it back into the field columns. This is especially useful for columns like who the referral is assigned to and/or course (Study Package Code) grouping.

Dragging back the column header for Study Package Code returns it to an ungrouped list.

2) You can select different columns as output and group them so that you can find which ones you want quicker. Keep in mind that depending on the area (Applications; Application Contents; Offers and Referrals) you will have different choices of fields that will be available.
This shows the categorization of columns and/or sorting the columns. You can select all or one at a time for the right-hand side to appear as the results.

3) Once you have the fields that you require you can export the results in Excel or PDF.
<table>
<thead>
<tr>
<th>Application ID</th>
<th>Application Type</th>
<th>Title</th>
<th>Given Name</th>
<th>Middle Name/s</th>
<th>Family Name</th>
<th>Preferred Name</th>
<th>Study Package Code</th>
<th>Study Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>30031</td>
<td>Course</td>
<td>Ms</td>
<td>Alinca</td>
<td>Jennifer</td>
<td>Pilkington</td>
<td>Alinta</td>
<td>C100012</td>
<td>Bachelor</td>
</tr>
<tr>
<td>30052</td>
<td>Course</td>
<td>Mr</td>
<td>Mostafa</td>
<td>Yehdani</td>
<td></td>
<td></td>
<td>PHD/ENGG</td>
<td>1 Doctor of</td>
</tr>
<tr>
<td>30055</td>
<td>Course</td>
<td>Not entered</td>
<td>Soukiasarh</td>
<td>Tom</td>
<td>Ravalabouch</td>
<td></td>
<td>PHD/NDVSS</td>
<td>2 Doctor of</td>
</tr>
</tbody>
</table>
SAVED VIEWS (QUICKER SEARCHING) – Applications & Offers

1) In Application Contents and Offers the following system Saved Views are available. They help to identify HDR specific applications based on owning organization unit (faculty) and type of program (PhD, MRes, BPhil, etc.) Both Appendix A and B give additional information here.

Each faculty has the main one which give all of the HDR related applications and/or offers depending on which section you are in (Application Contents or Offers)

- GRA_ARTS
- GRA_FSE
- GRA_FMHHS
- GRA_MQBS

and each type of program PhD, MRes or BPhil. The PhD also has the combined programs (110 and 122) and the MRes also has the MPhil programs.
An example of ARTS PhD is shown here.

2) Using the **Search Reset** and **Clear All for the Filter** sometimes helps to start over when selecting different search options.
3) You can create your own search view by first selecting the criteria and then saving the result with a name that makes sense for you.

The first step is to select the arrow in the Search text box to open the Criteria Builder. You then start adding each criteria. In this example, the Faculty of ARTS is used (active code of 2011 not inactive one) and Submission Method = “HDR Applications” which is the older HDR eApps system.

The next step is to select the arrow where the search folder icon is and add the saved view by using the + Icon. You will be presented with the screen to add the new view. You can make this your default if necessary. Once again keep in mind this is per each section. So, in this example the saved view was for the Application Contents. It would not be available for the other sections.
Remember if you don’t get the search results initially, it might be because of a previous Filter condition. Just Clear All Filters and then click the search icon again.

The screen snapshot to the right shows that the filter is cleared out and that the results appear after the search is selected.

4) Additional Saved Views have been created in the Referral section to help find quicker. The problem with the searching here is that there is not a good way to find the Curriculum programs (PhD, MRes, BPhil, MPhil, etc.).
The _GRA_FAC_ALL gives all faculties (including Org Unit 8303 for GRA Office)

Also, specific faculty ones have been created for ARTS, FMHHS, FSE and MQBS but these are not just for HDR (includes domestic referrals as well)

The _GRA_ReferralCreateBy uses the Referrals that were first created by GRA Central where you can list the staff names. The downside of this approach is that when staff changes it will need to be adjusted. You can still take this system Saved View and amend it and create your own view.
<table>
<thead>
<tr>
<th>Referral First Assigned To</th>
<th>Is one of</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Linda Gao</td>
</tr>
<tr>
<td></td>
<td>Catherine Murphy</td>
</tr>
<tr>
<td></td>
<td>Jin Jo</td>
</tr>
<tr>
<td></td>
<td>Regina Lee</td>
</tr>
<tr>
<td></td>
<td>Hayley Malouf</td>
</tr>
<tr>
<td></td>
<td>Syed Shah</td>
</tr>
<tr>
<td></td>
<td>Pauline Woo</td>
</tr>
</tbody>
</table>
TAGGING YOUR REFERRALS – Applications & Offers

1) First, you create the tag in the Referral section by clicking on the Tag icon and “New tag” link.

Give it a name (MyReferrals) and a colour. You can have multiple ones if needed.

2) You will find a TAGS section in the Filter which you can use when you are in the Referral section only.

Click on the arrow next to the Filter icon and select those referrals that you wish to keep track of with this tag.
### HDR Applicant Portal – Basics

#### Organisational Unit Is equal to 2011

<table>
<thead>
<tr>
<th>Filter</th>
<th>Applications</th>
<th>Application Contents</th>
<th>Offers</th>
<th>Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAGS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MyReferrals</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Referrals

<table>
<thead>
<tr>
<th>Filter</th>
<th>Applications</th>
<th>Application Contents</th>
<th>Offers</th>
<th>Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAGS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MyReferrals</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Refer AppId 8810, Stuid 47158786
- Refer AppId 13234, Stuid 47266074
- Refer AppId 23239, Stuid 41880161
- Refer AppId 29984, Stuid 47335637
3) Press the Tag button and then select your Tag name (MyReferrals) for those records that have been selected.

4) Now when you select the MyReferrals tag in the Filter it will show those 2 records.
APPENDIX A – ORGANISATIONAL UNIT (Searching for faculties quickly). This is available in the Application Contents; Offers and Referrals not the Applications section itself

Macquarie Business School (MQBS) = 1011 (active one NOT inactive ones)
Faculty of ARTS (ARTS) = 2011 (active one NOT inactive ones)
Faculty of Science and Engineering (FSE) = 4011 (active one NOT inactive ones)
Faculty of Medicine, Health and Human Sciences (FMHHS) = 5011 (active one NOT inactive ones)
Graduate Research Academy Office (formerly Higher Degree Research Office) = 8303 (active one NOT inactive ones)
APPENDIX B – Curriculum Type and/or Category Type (helps to identify the type of program)

<table>
<thead>
<tr>
<th>Curriculum Type and/or Category Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>110</td>
<td>PhD</td>
</tr>
<tr>
<td>122</td>
<td>Combined Program</td>
</tr>
<tr>
<td>130</td>
<td>MRes (Year 1 and 2)</td>
</tr>
<tr>
<td>130</td>
<td>MPhil</td>
</tr>
<tr>
<td>178</td>
<td>BPhil</td>
</tr>
</tbody>
</table>