PhD Planner Portal for PhD students

Table of contents

1. Introduction

The PhD planner is a system to help you carry out various tasks related to your PhD studies, such as revising and updating the PhD plan using a template, submitting the PhD plan to your supervisor for approval, checking enrolment details and updating your contact information.

In the PhD planner, you, your supervisor, the programme chair and the School head use an assessment option with a comments field to record evaluations of your progress in the form of updates on the progress of the PhD plan.

We recommend that your interactions with your supervisor include discussions about reporting on your PhD plan and on evaluations in the PhD planner as an integrated aspect of your studies. Such discussions are an excellent opportunity to make a more formal evaluation of your progress and to discuss long-term plans.

2. PhD student tasks

As a PhD student, your main tasks in the PhD planner are to:

1. Create the initial PhD plan and submit it to your supervisor. The PhD plan must be approved within three months after you start your PhD study programme (Note: This does not apply to PhD students at **Health**).
2. Update the PhD plan in connection with the intermediate evaluations and submit the plan to your supervisor on time.
3. Close the PhD plan in connection with the submission of your dissertation.

Section 7 contains a detailed explanation of how to create and update a PhD plan.

3. Log in

Log in to the system using the username and password you received by e-mail from your graduate school. Please note that you have received two e-mails:

- An e-mail with the subject heading 'Your username for accessing the PhD planner' which contains your username.
- An e-mail with the subject heading 'Your credentials for accessing the PhD planner' which contains a temporary password. The temporary password in this e-mail is only valid for 24 hours. You can request a new temporary password on the login page by typing in your e-mail address at the bottom of the page. The login pages for each graduate school can be found here:
  - Arts
  - Aarhus Business and Social Science
  - Science and Technology
  - Health

The first time you log in to the system, you will be asked to change your password. Please note when using an iPad, iPhone, tablet or smartphone there can be some difficulties with the responsive design. It is possible to open PhD Planner on these devices but it is difficult to work in the system.

4. Structure of the PhD planner

If there is a task waiting for you, you will be directed to the 'Home' tab when you log in. If not, you will be directed to your PhD plan on the 'My PhD Plan' tab. You will have access to three main tabs, located at the top of the screen.

Figure 1: The 'Home' tab

This section provides a comprehensive guide to the contents of the main tabs. You are encouraged to familiarise yourself with the contents of this section, but without necessarily reading it from A to Z. Instead, use it as a reference in case of doubt.

4.1. Home

On the 'Home' tab, there are two headings:

‒ My tasks: Provides a list of your current tasks and their due dates.
‒ My plans: Provides basic information about your PhD plan.

4.1.1. My tasks

The table under the 'My tasks' heading contains six columns:

Figure 2: The 'My tasks' table

- **Due date:** The date on which the task is due.
- **Type:** Specifies the type of task.
- **Task subject:** The name of your PhD plan. This heading is also a clickable link to 'Plan details'.

- **Status:** The current status of the task in the system. When it is time for you to create or update your PhD plan, the status will read 'Awaits student planning'. This is also a clickable link to the assessment of the PhD plan.
- **Comments**: This column may contain a short note, either from the immediately preceding step in the workflow or a note you have made to yourself.
- **Select:** This column contains two links:
    - Click 'Update' when you wish to update the status of the task, i.e. move it along in the workflow.
    - Click 'View' to go to your PhD plan for review and updating.

For a complete breakdown of the various parts of a PhD plan, see section 5.

4.1.2. My plans

The table under the 'My plans' heading contains seven columns.

Name	Type	Start	End	Evaluation cycle	Location	Status
PhD Plan Mickey Mouse	PhD Plan	01/03/2013	31/10/2016	1	Planning	Awaits student planning

Figure 3: The 'My plans' table

- **Name:** The name of your PhD plan. This heading is also a clickable link to 'Plan details'.
- **Type:** Specifies the type of task. Identical to the 'Type' column in the 'My tasks' table above.
- **Start:** The start date for your enrolment, i.e. the starting date for the period in which the plan is active.
- **End:** The end date for your enrolment, i.e. the end date for the period in which the plan is active.
- **Evaluation cycle:** The number of the upcoming evaluation. If you are at the initial plan (not PhD students at **Health**), the evaluation cycle column will read '0'.
- **Location:** The location of the task in the workflow. (i.e. 'Planning', 'Supervisor' etc.)
- **Status:** The status of the task, as in the 'My tasks' table above.

4.2. My PhD plan

The 'My PhD plan' tab provides a quick overview of your PhD plan. For a complete breakdown of the various parts of a PhD plan, see section 5.

4.3. Password and Profile

On the 'Password and Profile' tab you have the option of changing your password. You will be asked to enter your current password and your new password. To confirm your new password, you will be asked to enter it a second time.

4.3.1. Contacts

The 'Password and Profile' tab contains a table with your contacts, usually your main supervisor and co-supervisor(s). The table under the 'Contacts' heading contains five columns:

- **Name:** The name of a contact.
- **Role:** The contact's relation to you, e.g. 'main supervisor' or 'co-supervisor'.
- **Position:** The contact's position, e.g. 'Professor' or 'Associate professor'.

- **Account:** The programme with which the contact is affiliated.
- **Phone:** The contact's telephone number if possible.

4.3.2. My profile

The 'Password and Profile' tab also contains a number of boxes under the heading 'My profile' which contain important information.

Study

This box contains various types of basic information about you and your enrolment and cannot be edited by you.

Figure 4: The 'Study' box under the 'my profile' at the 'Password and Profile' tab

- **Affiliated:** Your departmental affiliation.
- **Student number:** Your Aarhus University student number.
- **Project title:** The initial project title entered by you when you applied for the position.
- **Enrolment type:** Specifies which enrolment type your PhD belongs to, e.g. '3 year programme'.
  - Programme: The programme with which you are affiliated.
  - Start: The start date for your enrolment.
  - End: The end date for your enrolment.
  - Credit: The number of months for which you have earned credit.
- **Status:** Specifies your enrolment status.
- **Location:** Your place of work.
- **Admission letter:** Attached as PDF.
- **Employment letter (where relevant):** Attached as PDF.

Qualifying examination (not applicable to PhD student at Health)

This box contains the date and status of your qualifying exam and cannot be edited by you.

- **Qual exam**: The date of your qualifying exam.
  - Status: The status of your qualifying exam, e.g. 'Planned'.

Figure 5: The 'Qualifying examination' box under the 'my profile' at the 'Password and Profile' tab

Study conclusion

This box contains information about the conclusion of your studies and will only be filled in towards the end of your enrolment. The information in this box cannot be edited by you.

Figure 6: The 'Study conclusion' box under the 'my profile' at the 'Password and Profile' tab

Student portal

This box contains only one piece of information: your username for the PhD planner student portal. This cannot be edited by you.

Figure 7: The 'Student portal' box under the 'my profile' at the 'Password and Profile' tab

Extension requests (days), if any

This box contains information about extensions of your study programme. The extensions can be caused by maternity/paternity leave, long-term illness, other forms of entitled leave, agreed leave or a study time extension. This information cannot be edited by you.

Figure 8: The 'Extension request' box under the 'my profile' at the 'Password and Profile' tab

Other, if relevant

This box contains information about:

- **University agreement** (e.g. double degree)
- **Cooperating institution**
- **Salaried work before Master's degree**: Number of semesters, you have chosen to work as a student teacher during your part A before you obtain your Master's degree (only for PhD students at **ST**)

- **Seniority months:** The amount of seniority months you had when you started your term of employment (not applicable to PhD students at **Health**)
- **Permit:** Form type and expiration date for you residence and study/work permit

Figure 9: The 'Other' box under the 'my profile' at the 'Password and Profile' tab

Office

This box contains your office address contact information and may be edited by you.

Home

This box contains your home address contact information and may be edited by you.

Figure 10: The Address' boxes under the 'my profile' at the 'Password and Profile' tab

5. Contents of the PhD plan

Under the PhD Order, you must complete a research and education plan (a PhD plan) outlining how you intend to complete your PhD project including your dissertation within the prescribed duration of your study programme.

The PhD plan must be completed as quickly as possible after registration (not applicable to PhD students at **Health**), and it must be approved no later than three months after the start of your study programme (i.e. the PhD plan must be approved by all participants in the workflow by this deadline).

PhD students at Health:
Fill out the PhD plan in accordance with the initial PhD plan you submitted in your application for admission to the PhD programme.

Clicking 'View' (in the 'My tasks' table on the 'Home' tab) or clicking the plan name (either in the 'My plans' table on the 'Home' tab or on the 'My PhD plan' tab) brings you to your PhD plan, which contains a number of vertical tabs: Plan summary, Plan details, Plan diagramme, Present evaluation and Plan history.

5.1. Plan summary

The 'Plan summary' tab provides an overview of basic PhD plan information divided into three main sections or boxes: 'Plan', 'Stage' and 'Workflow'.

Figure 11: The 'Plan summary' tab

Plan

The 'Plan' box provides an overview of basic information:

- **Name:** The name of the plan.
- **Start date:** Enrolment start date for the PhD study programme.
- **End date:** Enrolment end date for the PhD study programme.
- **ECTS:** Overview of the number of planned and completed ECTS credits in the PhD plan.
- **Research Environment Change days:** This usually indicates stays abroad. Research environment change means study or research at institutions and workplaces outside Aarhus University, e.g. other universities, companies, public or private organisations, hospitals, educational/research

institutions. This also includes compulsory changes of research environment, but excludes participation in conferences and the like.

Stage

The 'Stage' box provides information on the current status of the PhD plan:

- **Kind:** Can be either 'Initial' (When you have to create the PhD plan. Not applicable to PhD students at **Health**), 'Intermediate' (for regular evaluations) or Final (the last evaluation before submission of the dissertation).
- **Current approval cycle**: The number of the current evaluation. If this is your initial PhD plan, the value will be 0.
- **Trial period status:** If you are in a three-month trial period.

Workflow

The 'Workflow' box indicates where the PhD plan/evaluation is currently located in the workflow.

- **Status:** Current status of the PhD plan/evaluation. In the example shown in Figure 5, the plan awaits student planning.
- **Location:** The current location of the task.
- **Note:** May contain a note from either the immediately previous step in the workflow or from yourself (see section 6).

5.2. Plan details

The 'Plan details' tab provides an overview of the various elements of your PhD plan organised in a table that also contains the planned start and end dates for each element, as well as its current status (see Figure 12). Note that the 'Plan details' elements are similar to the elements a PhD degree programme must contain under the PhD Order.

The following statuses can be assigned to an element:

- 'Planned': An activity you are planning as part of your PhD programme, for example study abroad.
- 'In Progress': An activity that is in progress, for example getting an article published.
- 'Completed': An activity that is finished, for example a PhD course you have participated in.
- 'Discarded': An activity you were planning but which you have discarded for some reason, for example a PhD course that has been cancelled or a change of plans regarding a research environment change. When you discard an activity you can still see the discarded element. You are free to discard planned activities as long as your PhD study programme contains the relevant elements required under the PhD Order.

Please note that because your PhD plan must include all the plan elements which are in your PhD plan by default, you must not delete all the elements within a plan element category.

Each element has a 'View/edit' link to a more detailed screen. Attachments can also be connected to each element, such a confirmation of participation in a PhD course, a course certificate, co-author statement and the like.

At **ST** and **Aarhus BSS**, the list of completed activities is attached to the PhD diploma.

The current workflow status is displayed in the top right corner of the 'Plan details' tab. If the PhD plan awaits student planning, a direct link to the 'Update' page will also be visible.

When you create or edit a plan element, always remember to save your work by clicking the 'Save' button at the bottom of each edit screen.

Figure 12: The 'Plan details' tab

The various plan elements are:

PhD Project: Your overall PhD project

In the evaluation, you must account for the work involved in your PhD project during the evaluation period. If you are a PhD student at **Arts, Aarhus BSS** or **ST**, you must upload a project description within the first three months of your PhD study. The plan must be approved by your supervisor, your programme chair,

and the head of the graduate school.

PhD students at **Health**:
You will have submitted the project description during the application process. Make sure to upload a copy of the submitted PhD project description to the PhD planner.

In connection with each evaluation during your PhD study you must account for the work involved in your PhD project. If there are any changes in the project in relation to the approved PhD plan, these changes must be accounted for, and the reasons for them must be explained. In such cases, a revised PhD project description (including a timetable if applicable) must be registered under 'PhD project'.

Publication

Here you must list any publications you produce during your PhD study programme as well as co-author statements where applicable. You must list the title, place/form of publication, number of pages, and co-authors where applicable (PhD students **at Health**, **Arts** and **Aarhus BSS** must remember to attach any co-author statements).

PhD Course

Here you must list all the activities which generate ECTS credits, primarily PhD courses. Under the PhD Order, you are required to complete PhD courses worth approximately 30 ECTS credits.

Choose the country in which the PhD course took place. Instead of choosing from the dropdown list, you can enter the first letter in the search field, i.e. 'D' for Denmark, and you will automatically be taken to countries beginning with the letter D. You can choose Denmark as the temporary country if you are planning to take a course and don't know what country it will take place in yet.

PhD students at Arts:
- In this plan element, you must also list any other activities that generate ECTS credits, i.e. participation in seminars. However, participation in seminars/conferences/workshops cannot in itself be regarded as the equivalent of a course unless your supervisor deems that the academic activities involved correspond to a PhD course in terms of their content (for instance a project presentation with your own papers, conferences combined with PhD workshops, and PhD summer schools). The number of ECTS credits allocated to the activity in question by the main supervisor must be stated.
- The following two PhD courses are compulsory:
  - Course in PhD supervision for PhD students
  - University pedagogics

PhD students at Health:
Please list all PhD courses taken during your PhD programme, e.g. scientific courses, generic courses, elective courses and mandatory courses. If you have attended PhD courses during your Research Year, these can also be included in your PhD plan. Please note that the following two courses are mandatory for PhD students at Health:

- Basic Biostatistics

- Welcome to the PhD study (from 1 January 2014)

Other activities that should be listed as 'PhD Course':

- Course activities that do *not* generate ECTS, e.g. the mandatory introductory course "Welcome to the PhD day" (0 ECTS).
- Written report based on a stay abroad
- PhD Day attendance with submission of abstract

Dissemination

Here you must list types of dissemination activities relevant to your PhD study programme, including the teaching activities required according to your employment contract. In addition, list activities such as lectures or presentations, participations in interviews on radio/TV, and articles in media aimed at the general public.

PhD students at Health:
List the total number of teaching hours including preparation.

PhD students at Arts:
In this plan element, you must describe the type of task and state the total number of working hours involved (find the form here). This applies to all PhD students whether or not they are covered by the working regulations at their department.

AARHUS
UNIVERSITY
SCIENCE AND TECHNOLOGY

| Home | My PhD Plan | Password and Profile |

Dissemination

Name

Format ▾ [Source]

Institutarbejde

Start date*   26/08/2013
End date*   18/10/2013
Progress   Planned   ▾
Country*   Denmark   ▾
Comments   Institut: 80/120
              Ekstern institution 20/30

Attachments
Attachment1   [Vælg fil] Der er ikke valgt nogen fil
Attachment2   [Vælg fil] Der er ikke valgt nogen fil
Attachment3   [Vælg fil] Der er ikke valgt nogen fil
Attachment4   [Vælg fil] Der er ikke valgt nogen fil
Attachment5   [Vælg fil] Der er ikke valgt nogen fil

[Save]

Powered by PeopleXS

Figure 13: The plan element 'Dissemination' edit screen

Research Environment Change

Here you must list PhD project-related stays at institutions and workplaces outside Aarhus University. This usually means a stay abroad. You can choose one of the following types of research environment change:

- Public educational or research institution
- Public company or organisation
- Hospital
- Private educational or research institution
- Private company or organisation
- Other workplace

According to the PhD Order, you must participate in research environments at other research institutions during your PhD study programme.

Please note that you must create an element for each change of research environment period. This is also a requirement if you have more than one stay at the same institution. Each element should correspond to the specific period during which you are away from Aarhus University in connection with a research environment change.

You can choose the country in which the research stay took place. Instead of choosing from the dropdown list, you can enter the first letter in the search field, i.e. 'D' for Denmark, and you will automatically be taken to countries beginning with the letter D. You can choose Denmark as the temporary country if you are planning to take a course and don't know what country it will take place in yet.

If you did not spend the entire time/period of your research stay at the institution/workplace, you must indicate what percentage of the time/period you spent at the institution/workplace in the box 'Percentage of time spent'. By default, the value is set to 100 per cent.

Other activity

Here you must list any activities which are not mentioned under other categories. Relevant activities under 'Other activity' can vary from graduate school to graduate school, for example participation in conferences, workshops, journal clubs etc. Do not list activities that generate ECTS credits under 'Other activities'.

PhD students at Arts:
In this plan element, you must register information on the mid-term review and the PhD dissertation as well as participation in seminars/conferences which does not generate any ECTS credits:

Midway assessment
The result of the 4+4 course mid-term review is submitted in another form in connection with the transition to part B, but you must note down the date of the midway assessment in the evaluation which must be submitted immediately after the mid-term review.

PhD Dissertation
You must complete this point in connection with the three last evaluations:
- Do you plan to produce your dissertation in the form of a monograph, or a series of shorter papers (articles etc.)?

You must complete this point in connection with the two last evaluations:

- Have you started working on the manuscript of the dissertation (number of pages)?

Participation in seminars/conferences
Participation in seminars/conferences which is not equivalent to participation in courses and therefore does not generate any ECTS credits.

Supervision agreement

Here you must upload your supervision agreement. This is the agreement between you and your supervisor regarding mutual requirements and expectations in relation to the supervision process. The agreement should include details regarding the form and frequency of supervision sessions. Any changes to the supervision process already agreed must also be included in your PhD plan. When approving the evaluation, the supervisor and PhD student confirm that the supervision process has been satisfactory. You must remember to attach the supervision agreement.

PhD students at Arts:
- The agreement regarding PhD supervision (find the form [here](#)) is part of your PhD plan and must have been approved *no later than three months* after registration.
- If you change your supervisor or if additional supervisors are appointed, a new supervisor agreement *must* be drawn up and attached to the next biannual evaluation.
- If the school head has approved a change of supervisor between two evaluations, this must be stated and the approved agreement must be attached.

Financing plan

The financing plan for your PhD project. This page is administered by your graduate school and contains the financing plan agreed for your PhD project when you start your PhD study programme.

IPR agreement (Intellectual Property Rights)

Here you must list any agreements about the rights to any data collected under the plan element 'IPR agreement (Intellectual Property Rights)'.

PhD students at Arts:
You must add this information yourself as a plan element. In connection with drawing up the PhD plan, a decision must be taken regarding the question of copyright and the rights to any data material that is collected.

5.3. Plan diagramme

The 'Plan diagramme' tab provides you with a visual overview of the progress of the various elements of the PhD plan. By default the overview is visualised on a quarterly scale, but you can change this by clicking the 'Scale by: month' link above the graph. Here you can also open the graph in a popup window by clicking 'Full screen'. The diagramme makes use of four colour codes which are explained in the legend below the graph.
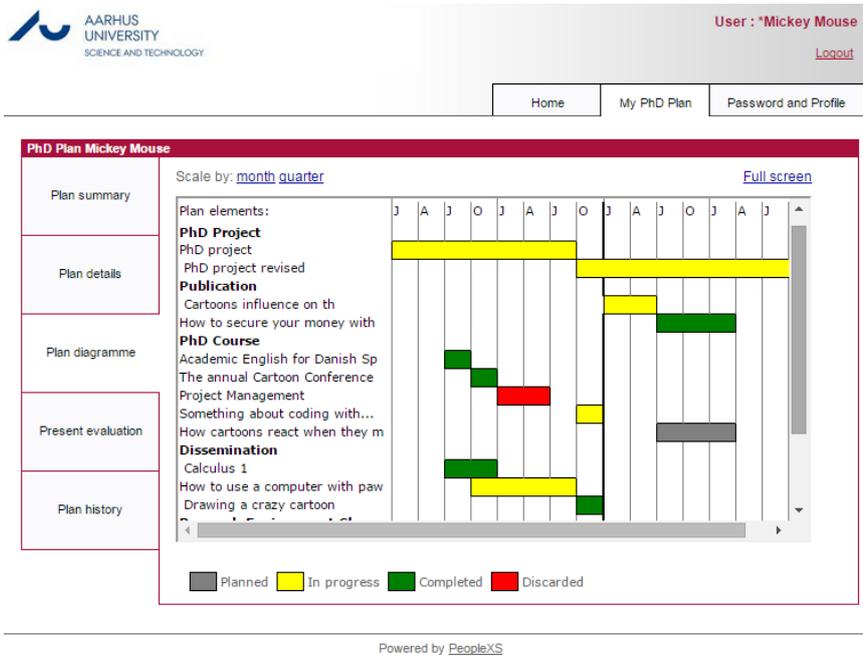

Figure 14: The 'Plan diagramme' tab

5.4. Present evaluation

Once you submit your PhD plan for approval, you can follow its progress through the workflow on the 'Present evaluation' tab. The 'Present evaluation' tab only contains information about the current iteration of your PhD plan while it is progressing through the workflow. Once your PhD plan is approved and returned to you for further work, the 'Present evaluation' tab is cleared.

The 'Present evaluation' tab is divided into five boxes corresponding to the steps in the workflow: 'PhD Student', 'Main Supervisor', 'PhD student Comments to Main Supervisor Assessment', 'Programme Chair' and Head of School'. The current location of the PhD plan is indicated by the heading 'Current location' (in red).

Figure 15: The 'Present evaluation' tab

All five steps in the workflow contain the same elements:

- **Name and time:** Name of the person responsible (i.e. PhD student, supervisor, programme chair or school head), along with the date and time for at which the PhD plan was passed along in the workflow.
- **Assessment:** The overall assessment of the PhD plan. The following overall assessments can be selected:
  - o 'Expect plan will lead to timely completion'
  - o 'Concerned plan may not lead to timely completion, adjustments necessary'
  - o 'Expect plan will NOT lead to timely completion, 3 month trial period necessary' (Only available to the supervisor, the programme chair and the school head). *This option cannot be selected during the initial PhD plan stage*.

- **Elaboration:** Elaboration of the assessment of the PhD plan/evaluation by different participants in the workflow, for example the PhD student or the school head.

At each step in the workflow, apart from the overall assessment, the person responsible must include some text. The person is asked to give a specific comment. These will also be displayed in the 'Present evaluation' tab.

5.5. Plan history

When an iteration of the PhD plan has made its way through the workflow, a snapshot of the 'Present evaluation' (a PDF file) is automatically generated with a title corresponding to the number of the evaluation. This provides a quick overview of the evaluation, from the initial plan ('Approval snapshot 0': not applicable to PhD students at **Health**) onwards and makes it easier for you as well as the supervisor, the programme chair and the school head to track your progress as it is expressed in your evaluations.

Figure 16: The 'Plan history' tab

6. Workflow

This section very briefly outlines the workflow of a PhD plan/evaluation, since the workflow does not necessarily progress in a linear fashion from you to the school head. In fact, the evaluation must be returned from the supervisor to you before it is passed on to the programme chair. This is to allow you to see the assessment and any comments from the supervisor and to give you a chance to make your own comments on these, cf. the PhD Order.

Also, there are several other steps where the PhD plan/evaluation may be returned to a previous step in the workflow for further comments or adjustments.

The initial plan (not applicable to PhD students at Health)
Step 1: You create the PhD plan and submit it to your supervisor.

Step 2: The supervisor reviews and assesses the PhD plan and sends it to the programme chair or back to you for adjustments (return to Step 1).

Step 3: The programme chair reviews and assesses the plan and then either sends it to the school head (Step 4) or, if the programme chair deems adjustments to be necessary, returns it to the supervisor (return to Step 2).

Step 4: The school head reviews and assesses the PhD plan. He or she then has several options. The PhD plan can be:

- Approved
- Approved with adjustments
- Returned to programme chair (return to Step 3)
- Returned to supervisor (return to Step 2).

If the school head approves the PhD plan with or without adjustments, the PhD plan has made it through the workflow successfully and it is returned to you for further work prior to the next evaluation.

Intermediate evaluations

Step 1: You adjust the PhD plan and make the evaluation and send it to the supervisor.

Step 2: The supervisor reviews and assesses the evaluation and returns it to you, either for comments prior to the evaluation being sent to the programme chair (Step 3) or back to you for adjustments (return to Step 1). (Please note that you are not able to edit your PhD plan when it is send to you for comments.)

Step 3: You add comments to the supervisor's assessment and pass the evaluation on to the programme chair (Step 4). You have a two-week window to make any comments and pass on the evaluation. If you do not do so, the evaluation is automatically sent to the programme chair after the two weeks.

Step 4: The programme chair reviews and assesses the evaluation and then either sends it to the school head (Step 5) or, if the programme chair deems adjustments to be necessary, returns it to the supervisor (return to Step 2).

Step 5: The school head reviews and assesses the evaluation. He or she then has several options. The evaluation may be:

- Approved
- Approved with adjustments
- Returned to programme chair (return to Step 4)
- Returned to supervisor (return to Step 2)
- Finally, if the supervisor, the programme chair or the school head deems a three-month trial period necessary, the school head may choose 'Start trial period'.

If the school head approves the evaluation with or without adjustments, the evaluation has made it through the workflow successfully and it is returned to you for further work prior to the next evaluation.

7. Quick guide: How to create and edit a PhD plan

This section outlines in somewhat greater detail how to create, maintain and update a PhD plan. Fundamentally, there is no difference in the procedure for creating an initial PhD plan and the following intermediate plans, except that the initial plan requires more work.

7.1. Log in

If there is a task waiting for you, you will be directed to the 'Home' tab. If not, you will be directed to your PhD plan on the 'My PhD Plan' tab.

7.2. View your plan

Click 'View'. This brings you to the 'Plan details' tab on the 'My PhD plan' tab. This tab lists all your current plan elements. Please note that the 'Financing plan' element cannot be edited by you as it is uploaded by the graduate school.

7.3. Add a plan element

If necessary, add a new element using the dark grey 'Add plan element' link in the top left corner. Otherwise, you may edit each existing element by clicking the 'Edit' link at the right-hand side of each plan element. You may also delete or reschedule (see the next section) a plan element using the two links at the bottom of the 'Plan details' tab: Select the plan element you wish to delete or reschedule by ticking the relevant box(es) and then clicking on the relevant link. (Please note that you may not delete any of the following elements: 'PhD Project', 'Research Environment Change', 'Supervisor agreement' or 'Financing Plan'.)

Please note that because your PhD plan must include all the plan elements which are in your PhD plan by default, you must not delete all the elements within a plan element category.

The option to 'reschedule' elements means to move elements in time (see figure 17). This relates to the start and end date of each plan element. When you click 'reschedule', you are brought to a screen with an input box, a dropdown menu and a 'Reschedule' button.

In the dropdown menu you can choose to reschedule elements by days, weeks, months, quarters or years. Enter the number of days/weeks/months/quarters/years you wish to reschedule the element by in the text field. By default, the reschedule option is positive, which means that it is set up to reschedule elements forward in time. If you enter a number and click 'Reschedule', the element will be moved forward in time by the same number of units as the number you enter and the type of unit you have chosen in the dropdown menu. However, the value in the text field may also be negative; i.e. you may also reschedule elements backwards in time. Do this by inserting a '-'(minus sign) just before the number in the text field.

Figure 17: The reschedule screen under the 'Plan details' tab

7.4. Editing your plan

When you choose to edit a plan element or create a new one, you will be brought to another screen containing the following elements:

Figure 12: The plan element 'Other activity' edit screen

1) A text editor with an interface that resembles the familiar MS Word. Whatever you write in the text editor here will show up on the 'Plan details' tab as the title of that particular plan element. For instance, it could be the title of a publication (under the heading 'Publication'),

the step of stays in other research environments (under the heading 'Research Environment Change'), or the name of your supervisor (under the heading 'supervision agreement'). Please note that to avoid copying codes from Word, you must type directly in the text editor. Do not copy the text from Word.

2) Start date: The starting date for the plan element. 'Start date' is mandatory (indicated by an asterisk).

3) End date: The end date for the plan element. 'End date' is also mandatory (indicated by an asterisk).

4) Progress: Here you choose the relevant status for the progress of the plan element. The progress may be marked as 'Planned', 'In progress', 'Completed' or 'Discarded'. The Discarded status is used for previously created plan elements which you have decided to drop before completion. You can delete the discarded plan elements after your decision to discard them has been approved as part of an evaluation.

5) Comments: A text field for further comments. For instance, in connection with your PhD project, this could be the project description, or, in connection with 'Supervision agreement', it could be the actual agreement on supervision you have made with your supervisor.

6) Attachment: Relevant attachments may be uploaded by clicking the 'Browse' button. A new window opens: Find the relevant document and click 'Open'.

Please notice that you must save the plan element at the bottom of page before you return to the 'Plan detail' overview.

Some plan elements also contain other features. All mandatory fields are marked by an asterisk *:

Plan element 'Publication':
- Co-author statements: Functions like 'Attachment' (above). Only PDF versions of co-author statements may be uploaded here.

Plan element 'PhD course':
- ECTS: The number of ECTS credits earned by taking courses or other activities.
- Country: The country in which the PhD course took place. Instead of choosing from the dropdown list, you can enter the first letter in the search field, i.e. 'D' for Denmark, and you will automatically be taken to countries beginning with the letter D. You can choose Denmark as the temporary country if you don't know in which country you are going to take the course.

Plan element 'Dissemination':
- Country: The country in which the dissemination (e.g. teaching) took place. Instead of choosing from the dropdown list, you can enter the first letter in the search field, i.e. D for Denmark, and you will automatically be taken to countries beginning with a D. You can choose Denmark as the temporary country if you don't know in which country you are going to take the course.

Plan element 'Research Environment Change':

- <u>Type</u>: The type of research environment must be selected from a dropdown menu where you can choose between 'Public educational or research institution', 'Public company or organisation', 'Hospital', 'Private educational or research institution', 'Private company or organisation' or 'Other workplace'.
- <u>Country</u>: The country in which your research environment stay took place. Instead of choosing from the dropdown list, you can enter the first letter in the search field, i.e. 'D' for Denmark, and you will automatically be taken to countries beginning with the letter D. You can choose Denmark as the temporary country if you don't know in which country you are going to take the course.
- <u>% of time spent</u>: If you did not spend the entire time/period of your research stay at the institution/workplace, you must indicate what percentage of the time/period you spent at the institution/workplace in the box 'Percentage of time spent'. By default, the value is set to 100 per cent.

Please notice that you must save the plan element in the bottom of page before you return to the 'Plan detail' overview.

7.5. Before submitting your plan to your supervisor

When you have finished editing and/or adding new plan elements and you are ready to submit the PhD plan to your supervisor, you may either:

- Click the 'Update' link in the top right corner of the 'Plan details' tab in the 'My PhD plan' tab.

- Or click the 'Update' link in the 'Select' column under 'My tasks' on the 'Home' tab.

This takes you to a new screen with a box entitled 'PhD plan'. Some of the elements here can (and indeed must) be edited by you, while others cannot.

Figure 13: The update screen

- **ECTS:** The number of ECTS credits you have earned so far. The number is calculated automatically by the PhD planner based on the ECTS values you have typed in the 'ECTS' box for your PhD courses (under the plan element 'PhD course'). If your total number of ECTS credits is lower than the total number of ECTS normally necessary to complete a PhD, a warning will appear next to the 'ECTS' field. This warning will remain visible until you have earned the requisite number of ECTS credits.

- **Research Environment Change days:** The number is calculated automatically by the PhD planner, based on the start and end dates you have provided for your research environment change stays (under the plan element 'Research Environment Change'). If your total number of research environment change days is lower than the total number of days normally necessary to complete a PhD, a warning will be appear next to the 'Research Environment Change days' field. This warning will remain visible until you have earned the requisite number of research environment change days.

- **Previous approval log:** Here you can see the latest approved version of your PhD plan.

- **Assessment:** You choose from a dropdown menu where you have two options: 'Expect plan will lead to timely conclusion' and 'Concerned plan may not lead to timely conclusion'. For further information about the different assessment options, please follow the read more link to the right of the dropdown menu.

- **Text:** Fill in the box below to elaborate your assessment.

The box titled 'Status: Awaits Student Planning' allows you to either save your work without sending it to your supervisor, or to submit the plan to your supervisor.

You can write a note in the yellow text fields either to yourself only (Comments for you) or to your supervisor (Comments for receiver). Think of the yellow text fields as digital Post-it note.

- **Save:** Saves your work and allows you to return and complete it later, before submitting the PhD plan to your supervisor.

- **Send to supervisor:** Moves the PhD plan along in the workflow by submitting it to your supervisor.

7.6. Send to supervisor

Once you click 'Send to Supervisor', your work is complete for the moment and it is now up to the supervisor to continue the process. As mentioned in the description of the workflow (section 6), your supervisor may choose to send the plan back to you for revision if he or she deems it necessary that you do further work on the PhD plan before it can be approved.

Under any circumstances, the PhD plan will be returned to you for comments once your supervisor has approved the plan. A new task will then pop up on the 'Home' tab, as described in section 4.1.1.