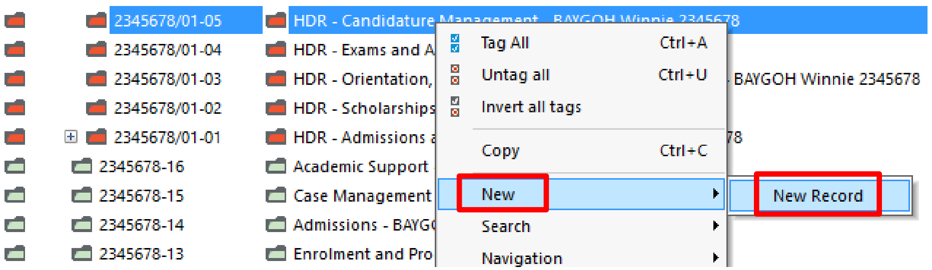
This Guide covers the following topics relating to the use of the HDR TRIM9 Candidature Variation Workflow by UON GR staff:

1. Create a New Application Record

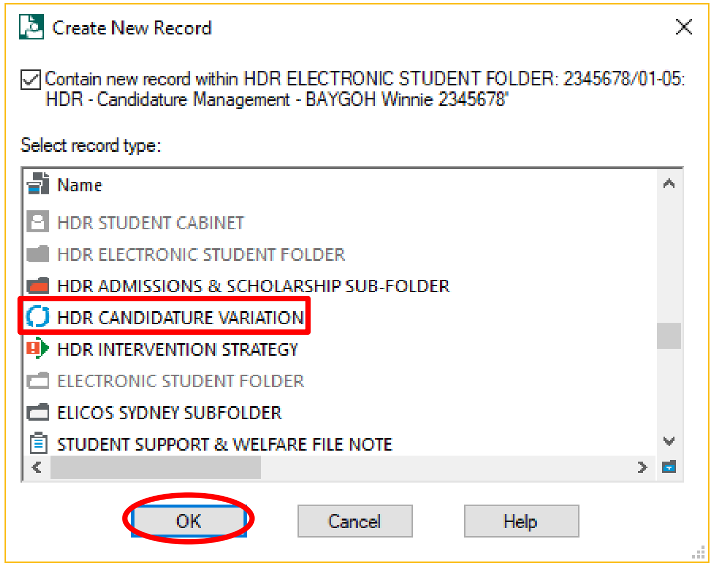
Candidature Variation applications will be received at graduate-research@newcastle.edu.au. They are then uploaded to the student's HDR – Candidature Management record in TRIM9.

For this, a new application folder will need to be created within the student's 'HDR - Candidature Management' folder in the student's HDR Student Cabinet. See below for example:

1. Right-click on the student's 'HDR - Candidature Management' folder in their TRIM9 HDR Student Cabinet → **New** → **New Record**:

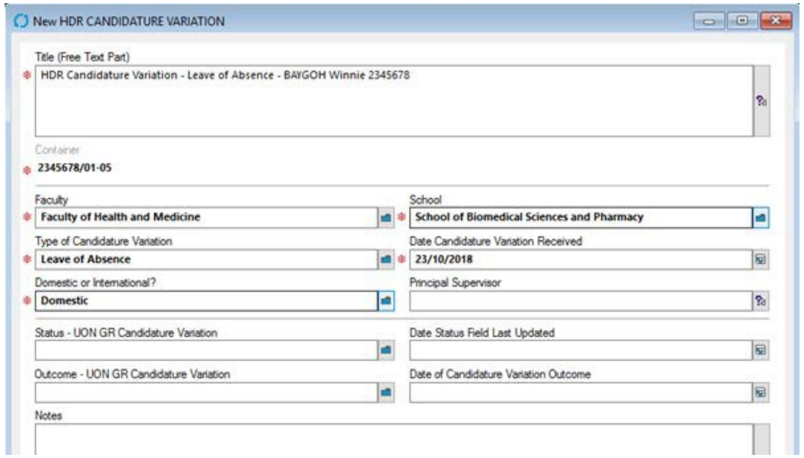


2. The **'Create New Record'** window will display. Select **HDR CANDIDATURE VARIATION** from the list then click **OK**:

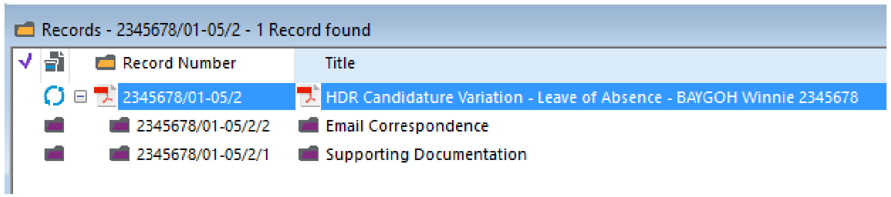


3. Populate the mandatory fields on the HDR CANDIDATURE VARIATION sub-folder Record Entry Form, then click **OK**:

NB: The naming convention for the sub-folder title will be HDR - Type of Variation - SURNAME Given Names 1234567.

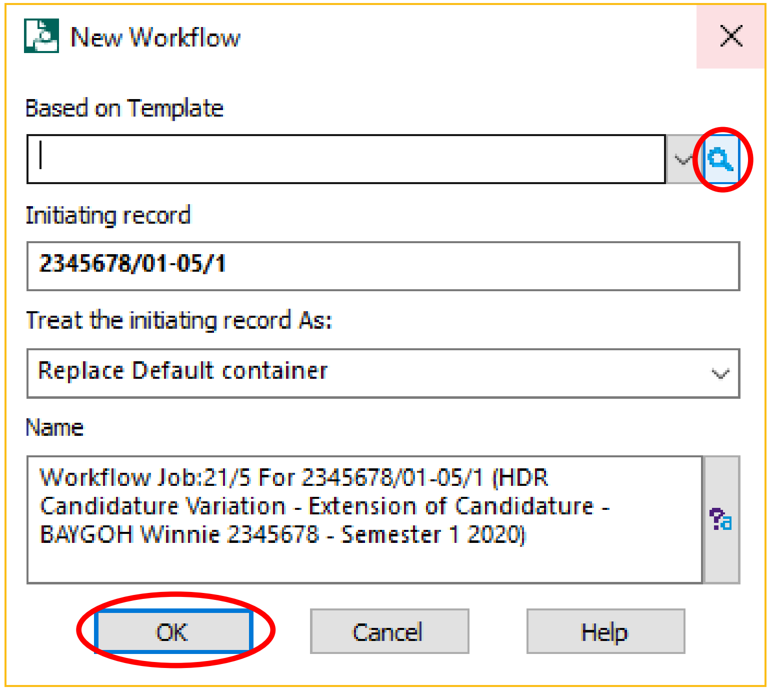


4. Save the Candidature Variation application form on the newly created sub-folder; (I.e. by dragging and dropping). Any supporting documents and email correspondence can be saved within the associated sub-folders:

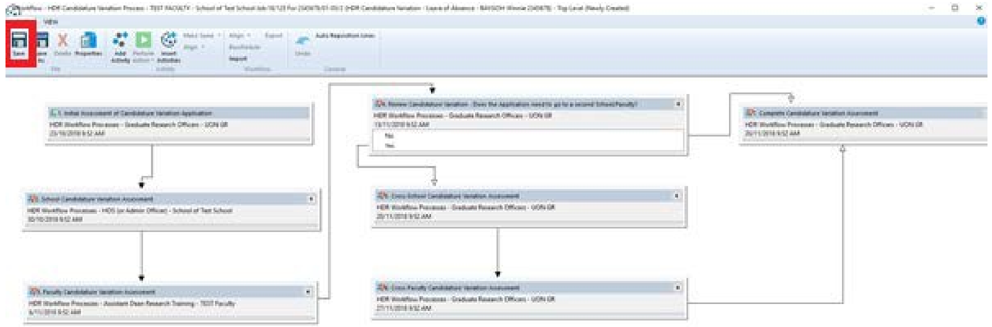


2. Initiate Workflow

1. Right-click on the new HDR Candidature Variation sub-folder → **Workflow** → **Initiate Workflow**:
2. The **'New Workflow'** window will appear. Click on the magnifying glass button at the end of the 'Based on Template' field, then choose the required **workflow template** from the list (based on the School the application pertains to). Then Click **OK**:

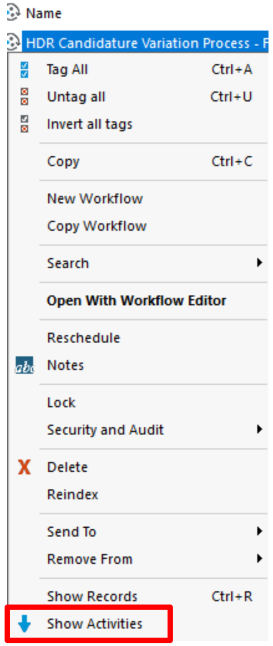


3. The Workflow Editor will display the chosen workflow process in pictorial view. Click **Save** and then close the editor to apply the chosen workflow:



NB: Should you want to complete Activity 1 'Initial Assessment of Candidature Variation Application' here in this pictorial view, right-click on Activity 1 → ***Complete***

4. The new Workflow will display on screen. If you didn't yet complete Activity 1, but would like to now, right-click on the Workflow → Show Activities:

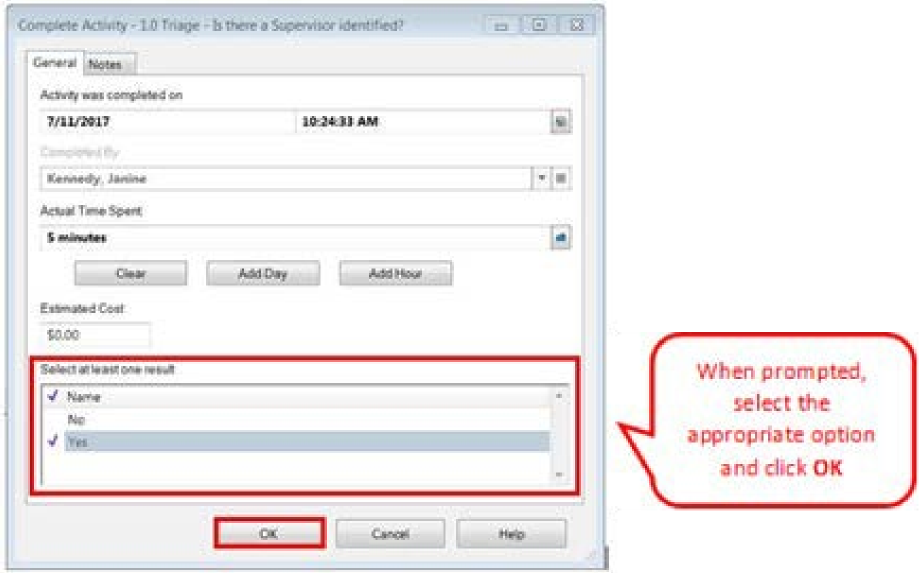


5. The seven Activities will display. Right-click on Activity 1 → **Complete**

3. Complete Activities

1. Go to the relevant Candidature Variation Saved Search. Run the Saved Search, then locate the application for which you want to complete an Activity.
2. Right-click on the application → **Workflow** → **Show Activities**
3. Right-click on the Activity you want to complete
4. Click on **Complete**. Once complete, the icon on the Activity will change to a tick

NB: Activity 4 (Review Candidature Variation) requires the user to select an option (Yes or No) in order to complete the Activity. Please see below example:

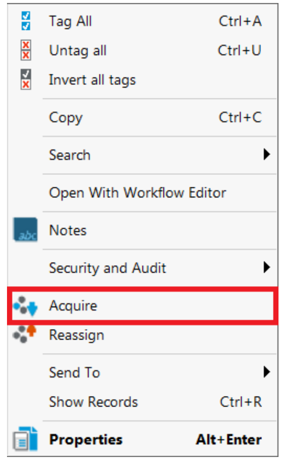


***NB:** You may need to acquire an Activity before completing it. This is because the Workflow Module is based on Positions (not People). If an Activity is assigned to your Default Position then you will **not** need to acquire it first in order to perform actions on these Activities (complete etc.).*

However, if an Activity is assigned to a Position you are a member of (but it is not your Default Position) then you must first acquire the Activity before you can complete it. An example of this might be if an RTO for a College needed to complete an Activity on behalf of their ADRT.

To acquire an Activity:

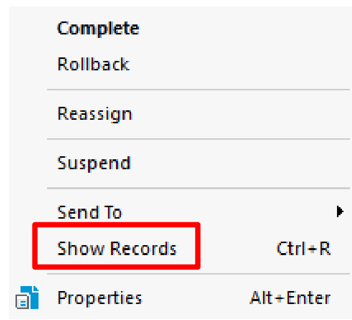
1. Right-click on the Activity
2. Click on **Acquire**:



4. Show the Candidature Variation Application

To navigate to the application and associated documents from the Current Activity:

1. Right-click on the Activity
2. Click **Show Records**

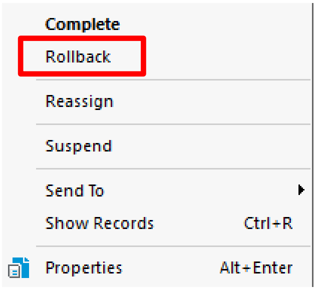


***NB:** Do not double-click on the Activity to attempt to show/open the records, as this may complete the Activity.*

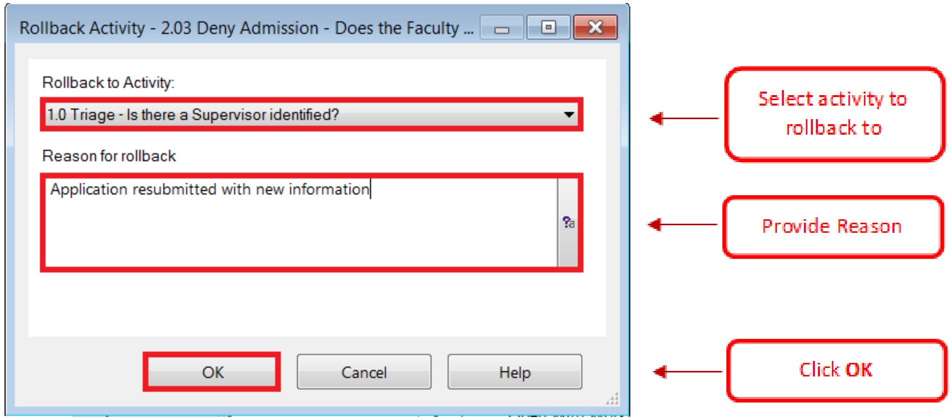
5. Rollback Activities

Rollback enables you to roll the Workflow back to an Activity preceding the Current Activity.

1. Right-click on the Current Activity
2. Click **Rollback**:



3. The **'Rollback Activity'** window will be displayed. Refer instructions in example below:

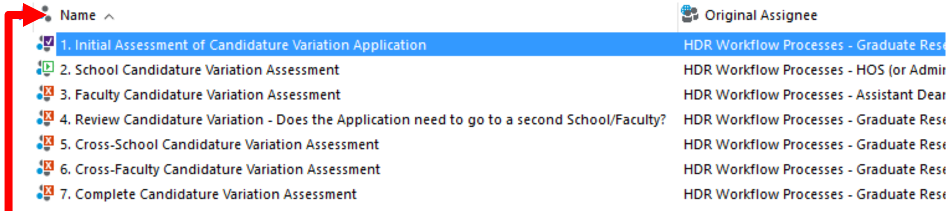


***NB:** If you do not see the option of **Rollback** in your drop-down menu you will have to first reassign the Current Activity to your Position – you can do this by using the **Reassign** option found by right-clicking on the Activity. Then perform the rollback steps above. Once rolled back, **Relinquish/Reassign** the Activity back to the original Position holder.*

6. Navigation (Show Activities)

To view all Activities (and their current status) for an application:

1. Right-click on the appropriate Candidature Variation application form
2. Select **Workflow → Show Activities**

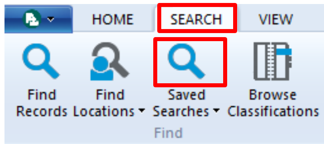


***NB:**: If the Activities aren't in process order, you can put them in process order by left clicking on the **Name** column header.*

7. Access Saved Searches

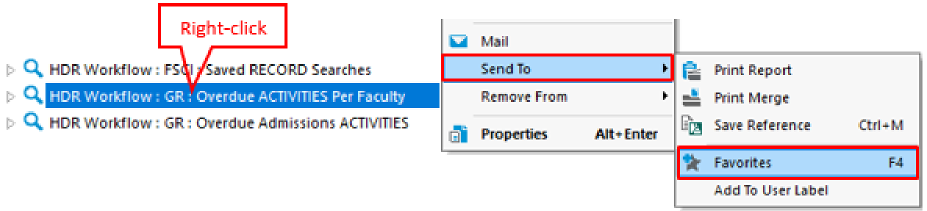
A number of saved searches have been configured to enable you to run reports and statistics.

1. Click the '**Search'** tab
2. Click on the **Saved Searches magnifying glass**:

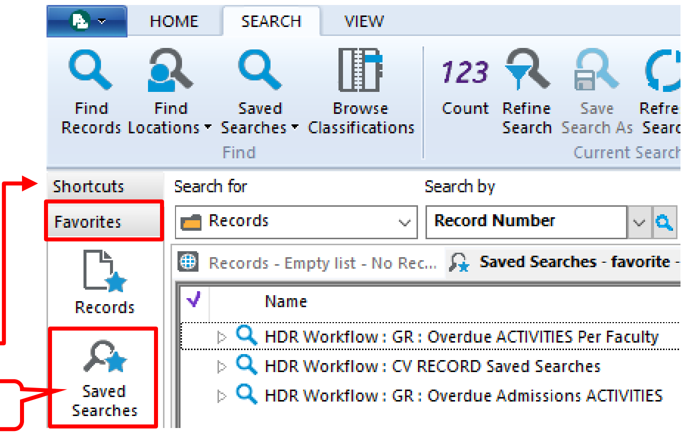


This will provide a list of all previously created and saved searches in TRIM9 that you have appropriate access controls to see. ***NB:** The titles of saved searches and/or saved search groups pertaining to these workflows begin with **'HDR Workflow'***

You may need to scroll to locate the saved search(es) that you would like to run/save. When you have located them, add them to your favorite saved searches via right-click → **Send To** → **Favorites**:



Then to access your favorite saved searches in future; select **Saved Searches** from the **'Favorites'** tab on your **Shortcuts bar**



Click Here

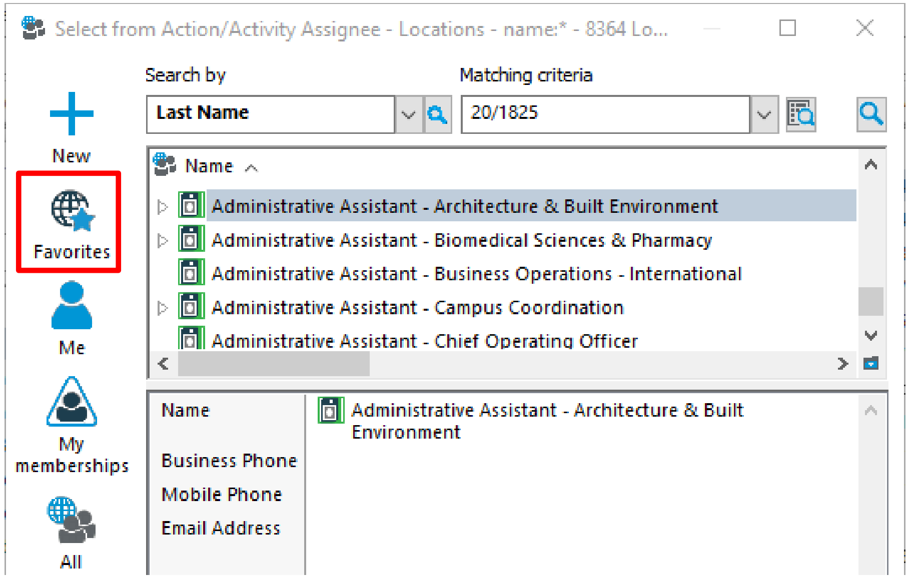
8. Cross-Faculty Authorisation (Activities 5 and 6) - Reassign Activities

For Change of Supervision applications Cross-Faculty authorisation may be required. If so, Activities 5 and 6 will be activated and will require you to reassign to the appropriate Head of School (HOS) and Assistant Dean of Research Training (ADRT) respectively for whichever second School/Faculty is required to authorise the application.

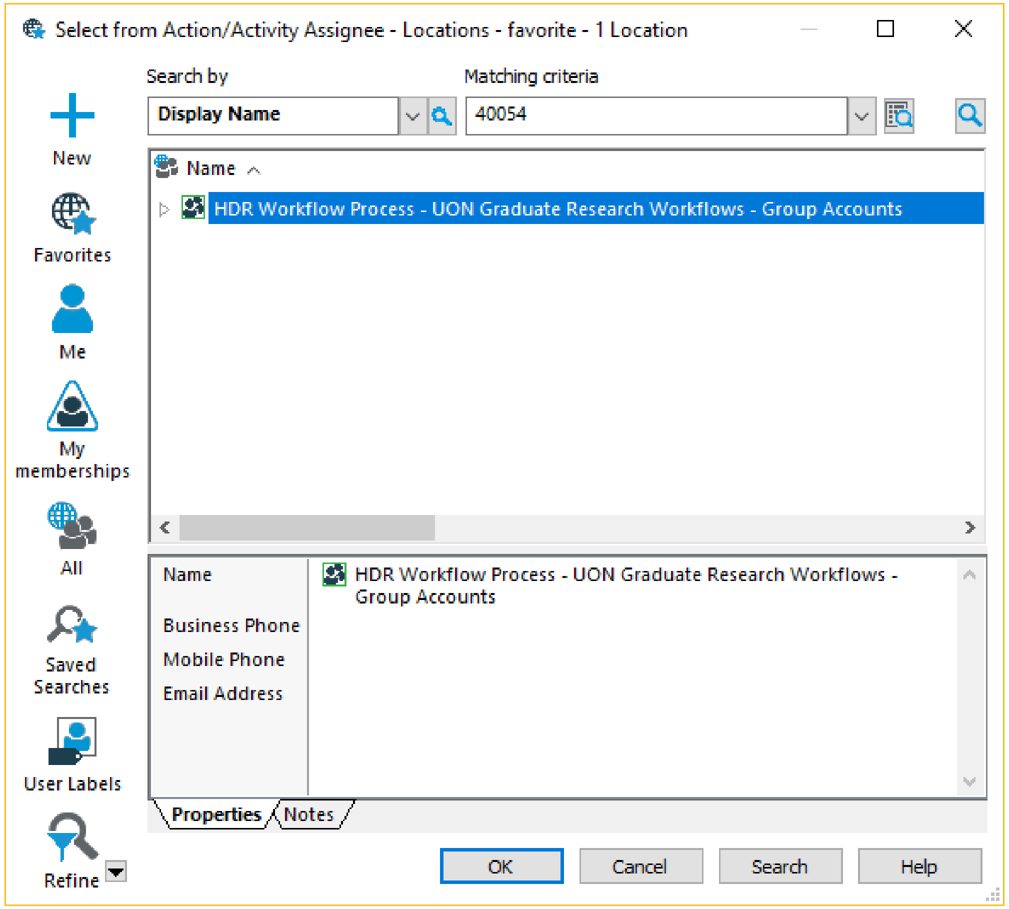
Hint: This task is a lot easier if the 'HDR Workflow Process – UON Graduate Research Workflows – Group Accounts' Location has been added to your TRIM Favourite Locations. If you haven't already done this, please do so by following instructions in the *TRIM9 - Quick Reference Guide - D18/65010 - HDR TRIM9 Workflows - Adding the 'Group Accounts' Location to your Favourites and Reassigning an Activity*.

To reassign Activities for Cross-Faculty Authorisation:

1. Navigate to the workflow Activities for the application
2. Right-click on **Activity 5**
3. Click Reassign, and the **'Select from Action/Activity/Assignee - Locations'** window will appear. Click on the **Favorites** button on the left of the window:

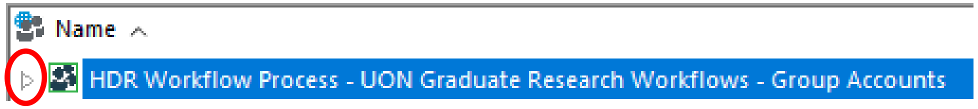


4. You will be presented with your Favourite Locations, which will include the HDR Workflow Group Accounts Location as shown below:

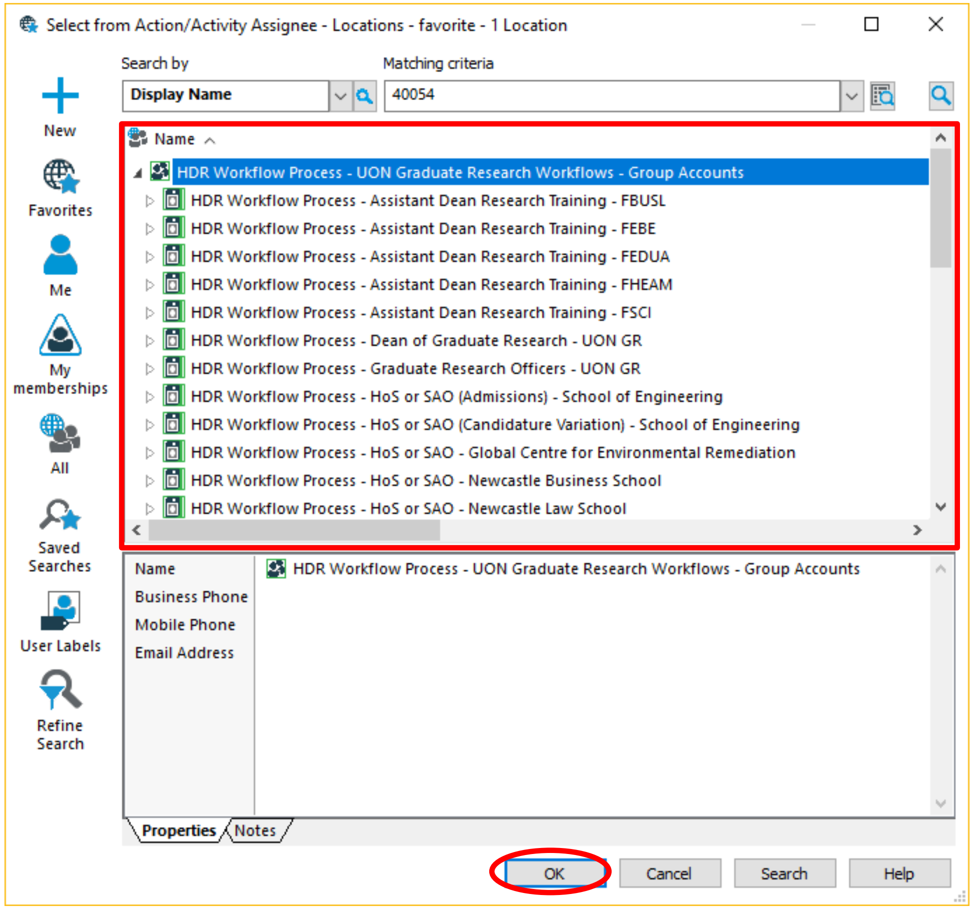


***NB:** If the HDR Workflow Group Accounts Location isn't showing in your Favourite Locations, please ensure you have added this Location to your Favourites by following the instructions in the linked Quick Reference Guide on the previous page of this guide. If you have followed these instructions but are still unable to see this in your Favourite Locations, please contact Records Governance Services for assistance.*

5. Clicking on the **triangle** to the left of the Group Location will show you every Position in TRIM9 which pertains to the HDR TRIM9 Workflows:



6. Scroll through to locate the appropriate **HOS Location** you want to reassign the Activity to, click on it once to select it, then click **OK** to finish reassigning the Activity.

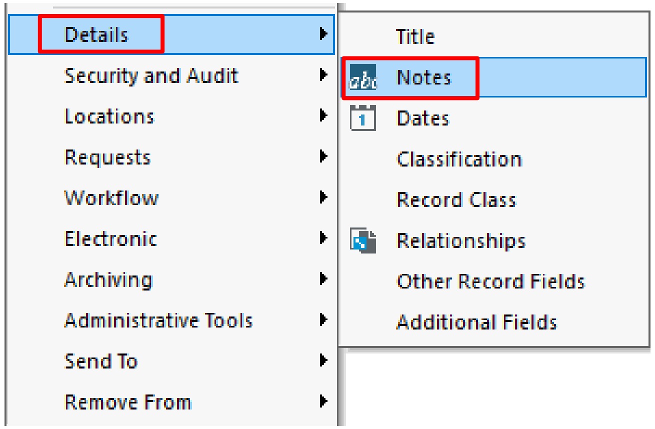


7. Repeat the above steps for **Activity 6**, this time selecting the appropriate **ADRT Location**.

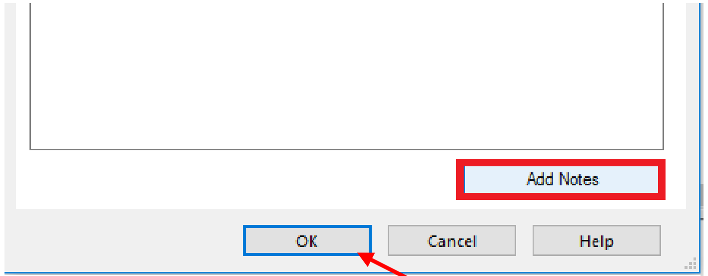
9. Add Notes

Adding a Note allows you to share key information on an applicant's file with other TRIM9 users. It is recommended that Notes are placed on the blue HDR Candidature Variation record which has the PDF of the Candidature Variation on it.

1. Locate the blue HDR Candidature Variation record (see Section 4. Show the Candidature Variation Application or use the relevant saved search)
2. Right-click on the record → **Details** → **Notes**:



3. Click **Add Notes**



4. Type your Note in the box then click **OK**

__NB:__ If you add Notes via the Properties instead of the above method, it will not record the date stamp.