

# **DEPUTY DEAN (EDUCATION)**

## **USER GUIDE**

**(Taught Provision)**

# **Nomination Portal**

**QUALITY AND ACADEMIC DEVELOPMENT  
BUSINESS SYSTEMS TEAM**



## INTRODUCTION

The External Examiners online nomination portal is a system which will allow a Deputy Dean (Education) to supervise and monitor their faculty's External Examiner nominations and appointments electronically. The portal is an enhancement of iTrent and will be familiar to users experienced with this system; this new system promises to offer more effective ways of centralising External Examiner information and communications across the organisation.

Using the online nomination portal, Deputy Deans (Education) can receive information and updates on their faculty's External Examiner nominations entirely electronically. Comments on each stage of the nomination process from other members of staff are recorded. This will allow you to effectively track the process of the nomination, and progress or block a nomination as appropriate.

## THE PORTAL

The new External Examiner Portal can be accessed through the [University's iTrent system](#). This guidance is designed to provide support whether you are familiar with iTrent as a system or not.



## CONTACT & HELP

If you have any questions or require further assistance, you can contact the **Quality and Academic Development Team (QUAD)** on the details below:



[external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk)



01206 87 4861

## AUTOMATED E-MAILS

Throughout the nomination and review process, the Portal will automatically generate communications to all parties (i.e. QUAD, the Department, the External Examiner etc.). You can request to view the auto-generated emails as a full set of appendices by emailing [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk). Please note that these are currently for internal reference only.



## Helpful Tips and FAQs

### KEYBOARD SHORTCUTS AND KEYS

- You can return to the iTrent home page with a right click anywhere on the screen.
- If you have more than one iTrent role, you can switch between them using the drop-down menu in the top right hand corner.
- When entering a date if you want to enter today just press 't' and it defaults to today's date.

## What could an External Examiner need to know?

### ► Registering as a user:

Your email address will default as your username.

Your password must be a minimum length of 8 characters and contain both upper and lower case and at least 1 number.

### ► Completing the information:

All mandatory fields must be complete before you can submit your information. These usually either indicated through the field highlighted in orange, or noted with a red asterisk. Attachments will be listed on the summary screen.

Please set your primary address as your mailing address. This will be the address that any postal communication will be sent to.

### ► How can I get a copy of the information I have submitted?

Navigate to *My information* on the left hand menu. Select the nomination you have submitted your information for. Select the *send email* button to receive a PDF copy to your email address.

### ► Can I complete some information and return later?

Yes, if you start entering some of your information as long as you press save and home or save and next the information you have completed with be retained. You can then log back in at a later date to complete the rest. To continue go to *My information > In progress nominations > Update*. You must complete and submit your information by the date indicated.

### ► How to reset a password?

Choose the forgotten password option. Enter your details and you will be emailed a reset password link.



# Who will be using the External Examiner online portals?

## External Examiners

External Examiners are part of University quality assurance processes. They provide an impartial view of the course and independent advice to ensure courses meet the academic standards and quality expected across the sector.

The online nomination and report portals will allow External Examiners to: submit their initial application information electronically; easily edit and update their details; check their schedules of awards/modules; submit their yearly reports and expenses claims; and check their University of Essex payslips.

## Departmental Managers/Departmental Admin Staff

The Departmental Managers and their delegated administrative teams take responsibility for the initial nominations of External Examiner and managing their duties when in post. Using the online nomination portal, External Examiner nominations can now be fulfilled entirely electronically, with the ability to check which stage a nomination process has reached. Departmental Staff can use the portal to manage and update their External Examiners' award/module allocations and request changes to their contracts.

Using the online report portal, Departmental staff can receive and store External Examiner reports, and draft Departmental responses, entirely electronically.

## Heads of Department

Heads of Department will be able to use the nomination portal to approve or decline External Examiner nominations generated by their Departmental admin team. Nominations will be received electronically and the portal will offer a simple way of storing and accessing the information needed to decide upon the suitability of an appointment.

The report portal offers a straightforward for Heads of Department to monitor External Examiner reports and Departmental responses.

## Deputy Deans (Education)

Deputy Deans (Education) will electronically receive External Examiner nominations that have been authorised by a Head of Department. The portal will store the details of the nomination and the nominee, alongside additional comments or supplementary information supplied by the nominating Department.

The report portal allows Deputy Deans (Education) to access, and comment upon, the External Examiner reports and Departmental responses for all Departments in their faculty.

## Pro-Vice Chancellor (Education)

The Pro-Vice Chancellor (Education) takes overall responsibility for the External Examiner process. If a nomination is progressed to them, the Pro-Vice Chancellor (Education) can access the portals to check the details of a nomination and approve/reject as appropriate. The Pro-Vice Chancellor (Education) will also have access to all External Examiner reports and Departmental responses stored in the report portal.

## Quality and Academic Development

The Quality and Academic Development team will continue to oversee the External Examiners for undergraduate and postgraduate (taught) provision. More information can be found on the [website](#).



## GLOSSARY OF TERMS

<b>Terminology in iTrent</b>	<b>University of Essex Terminology</b>
Requisition	Nomination
Performance reviewer	Person completing/ approving change request
Start Date	Start date of nomination
Applicant	External Examiner
Application closing date	Date External Examiner details needed by
Recruiting Manager	Person starting nomination
Requisition Administrator	Head of Department
Lifecycle	Nomination approval route
Workflow Group	Faculty Name



## Table of Contents

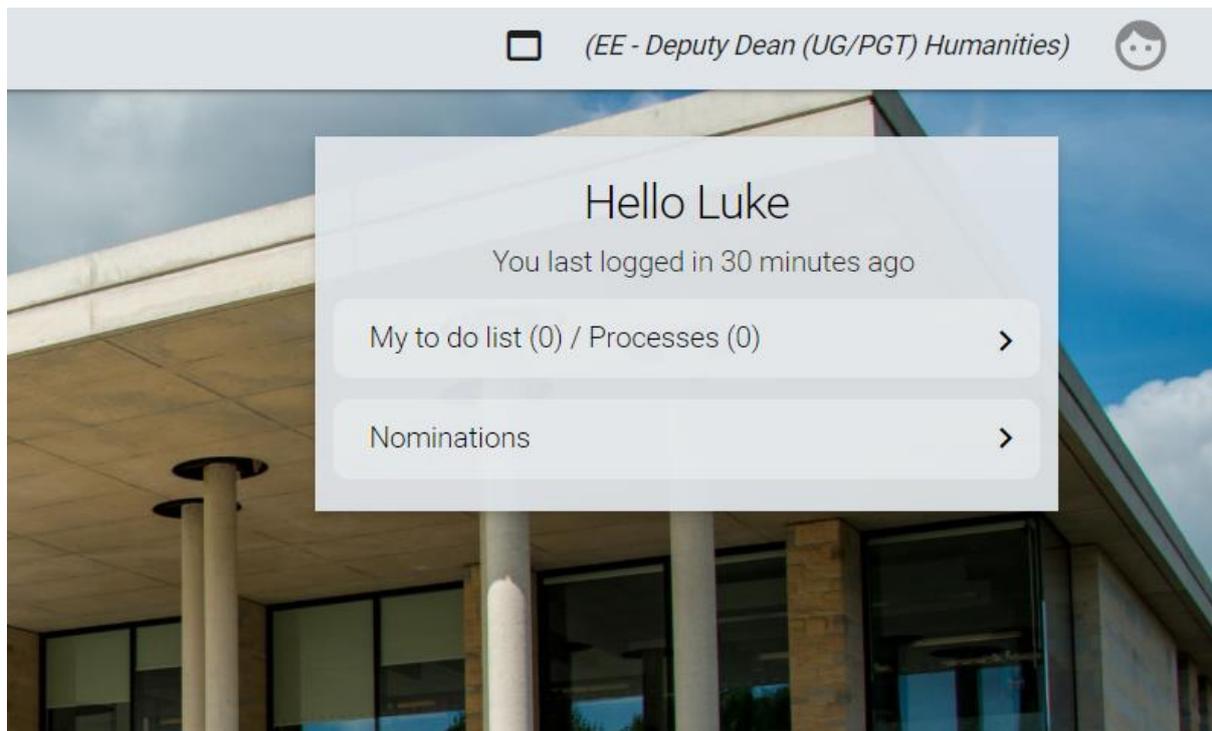
GLOSSARY OF TERMS.....	5
Home Screen.....	7
Recruitment summary .....	8
Step 2: Checking the nominee's CV .....	10
Step 3: Checking the suitability of an External Examiner nomination.....	11
Step 4: View authorisation history and comments .....	12
Step 5: Progressing the nomination .....	13



## Home Screen

When you first log into iTrent, choose your role. To access the External Examiner Nomination Portal, choose the role **EE – Deputy Dean** (*Level of provision + Your Faculty*).

Your Nomination Portal home screen will resemble the below screenshot.



### **My to do list (0) / Processes (0)**

This button should be ignored. Users who hold other iTrent roles should note that External Examiner actions are not listed as Tasks or Processes and will not appear on your to do list.

### **Nominations**

This button will take you through to the **Nominations** screen. From this view you can create and process new External Examiner nominations and check the status of nominations ongoing.



# Recruitment summary

When an External Examiner nomination has been submitted for your approval, you will receive an automated notification email from iTrent. This email will inform you of the nomination (or 'requisition') name and reference. Click on the link within the notification to log into iTrent.

When you access the **Nominations** view, you will initially arrive at the **Recruitment summary** screen. This page gives a summary of all of the nominations currently in progress

**Menu** – click this icon to display or hide the sidepane, including the search bar for searching for individual nominations.

**Requisitions** – a nomination is a 'requisition' within iTrent's terminology.  
**Applicants** – when a nominee submits their personal details to the Nomination Portal, they are classed as an 'applicant'.

**Your role** – this should always read EE- Deputy Dean (Level of provision + Faculty), followed by your Department. Click on the face icon in the corner to change to a different iTrent role or log out.

The screenshot shows the 'Recruitment summary' interface. At the top left is a 'MENU' icon. At the top right is the user's role: '(EE - Deputy Dean (UG/PGT) Humanities)'. Below this is a search bar with the text 'Search by requisition, location, dates'. The main content area is titled 'Open requisitions (1)' and contains a table with the following data:

Name	Applicants	Location	Start date	Application end date	Requisition end date
EE-Application Test (REQ03429)	0		26/11/2019	27/11/2019	

Below the table is a summary section with '1 Requisition in total' and '0 Applicants in total'.

**Applicants** – this indicates if the nominee has yet submitted their personal details online. If they have not, this column will read **0**; if they have, it will read **1**.

**Name** – this will display the name of your nomination and its unique requisition reference. This should always take the form: EE – *Name of nominee* (REQ#####).

**Start date** – The date that the nomination was created.

**Application end date** – The date at which the weblink supplied to External Examiners to submit their personal details becomes inactive.



Scroll to the bottom of the **Recruitment Summary** page and you will see a number of links arranged in a numerical sequence. These are the stages that you will need to follow in order

LINKS

Check new nomination



01. View nomination course details

02. Check nominated EE CV

03. Check EE suitability

04. View authorisation history and comments

05. Process nomination (approve/reject)

## Step 1: View the course allocation of the External Examiner nominee

The first step is to check the proposed list of courses and/or modules that are to be assigned to the new External Examiner.

Check new nomination

01. View nomination course details

Click on the button **View nomination course details**. This will bring up the below menu in the side bar.

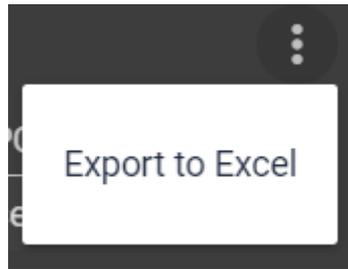
UDF category	No. of rows
EE - Course Details (Hum)	0
EE - Course Details (Partner)	0
EE - Course Details (SH)	0
EE - Course Details (SS)	6

Click on your Faculty to view a list of the proposed courses/modules to be assigned to the External Examiner.

UDF DETAILS (REQUISITIONS)		
Master Courses	Modules UG	Modules PGT/PGR
		BE PGT BE985 CO Research Portfolio
		BE PGT BE467 CO Managing for Ethics an...
BE CO PG00670 Management		
		BE PGT BE488 CO Operations and Supply ...
BE CO PG00430 Management and Organi...		
		BE PGT BE485 CO Management and Strat...



Click the below icon to export the list of courses/modules to MS Excel.



## Step 2: Checking the nominee's CV

The nominee's CV will have already been uploaded into the portal for you to review. To access and download this document, click the following button:

02. Check nominated EE CV

A list of the documents attachments associate with the nomination will then be available for access in the side bar. Click on the document name.

DOCUMENT ATTACHMENTS					
Document	Link	Filename	Document type	Date	Time
Test applicant CV	No	Test Applicant CV.txt	EE - Nomination Supporting Doc...	10/03/2020	15:34
Test applicant RTW	No	Test Applicant RTW.txt	EE - Nomination Supporting Doc...	10/03/2020	15:29

This will bring up the following screen. Click **Download** to access the document attachment.

## EE-Application Test

Document attachment details Test applicant CV ^ LESS


1. View authorisation comments

2. View courses/modules

3. Check nominated EE CV

4. Check external examiner suitability

5. Process nomination (approve/reject)

Document (required) Test applicant CV

Document type (required) EE - Nomination Supporting Docume ▼

Link

Filename Test Applicant CV.txt

DOWNLOAD

Click on the nomination name at the top of the screen to return to the **Requisition details** screen.

## Step 3: Checking the suitability of an External Examiner nomination

After reviewing the nominee's CV, you can find further supporting information relating to the suitability of an External Examiner's nomination stored on the portal under **check EE suitability**. This information has been provided directly by the External Examiner nominee as part of their application in order to support their eligibility to carry out the External Examiner role

### 03. Check EE suitability

On the side bar menu, click the category **EE – Examiner Suitability**. This will take you to the following screen, where you can check information provided on the following criteria for appointment.

- **Experience as an External Examiner**
- **Other External Examiner responsibilities**
- **Details of any potential conflicts of interest**



UDF Details EE - Examiner Suitability - EE - SYSTEMS Testing Samantha Sunshine MENU

Experience as an external examiner

Test of experience as external examiner

Other external examiner responsibilities

Test of my other external examiner responsibilities

Are there any conflicts of interest? No

I do not have any conflicts of interest

## Step 4: View authorisation history and comments

To check any comments that other users in the nomination/approval process have made on this nomination, you will need to click on the nomination name from the Recruitment summary home page and **View authorisation comments**.

Stage	Date	Notes	People resources
EE Stage 99: Reject/ Withdraw	15/04/2019	In my judgement, the proximity is ...	
EE Stage 3a: HoD supports/ QUA...	28/03/2019		
EE Stage 2a: Awaiting HoD check	26/03/2019		
Stage 1a: Web applicant	27/02/2019		

This will show you all the stages which the nomination has progressed through, as well as any comments which have been recorded from each stage.

If you choose to reject a nomination, the rationale for the rejection will be recorded in this section of the Portal. Please note that comments made in this section will be visible to all other individuals involved in the nomination (i.e. QUAD, Department Administrators and the Head of Department) so comments should be appropriate for all users to view. If discussions of a confidential nature are required with QUAD, please email [external.examiners@essex.ac.uk](mailto:external.examiners@essex.ac.uk) directly.



## Step 5: Progressing the nomination

Once you have made a decision on whether to approve, reject or request more information on a nomination, you will need to officially process the nomination.

### 05. Process nomination (approve/reject)

Click on **Process nomination (approve reject)**. This will bring up the below screen. Chose **EE Stage 4a: QUAD approved/Dean review** from the drop-down menu.

The screenshot shows a navigation bar with five buttons: 01. View nomination course details, 02. Check nominated EE CV, 03. Check EE suitability, 04. View authorisation history and comments, and 05. Process nomination (approve/reject). The 05 button is highlighted with a dashed border. Below the navigation bar is a section titled 'Update information' containing a 'Stage selection (required)' dropdown menu. The dropdown menu is open, showing options: 'Please choose', 'Please choose', 'EE Stage 4a: QUAD approved/ Dean review' (highlighted in blue), and 'EE Stage 4b: More information (Dean)'.

When you have selected this option, you will be provided with a second drop-down menu. This is where your decision of whether to approve or reject is registered. From the drop-down select either:

- **EE Stage 5a: Dean approved/QUAD process** to fully approve the nomination and send to QUAD for the final stages of the appointment
- **EE Stage 5b: Dean approved/PVC review** if you wish to provisionally approve the nomination but feel it necessary to forward to the Pro-Vice Chancellor (Education) for further review or
- **EE Stage 99: Reject/Withdraw** to reject the nomination. The latter option can also be selected if the nominee withdraws their application before appointment is made.

Please add any comments pertinent to your decision to the **Stage notes** text box, noting that these comments can be viewed by any colleague involved in the nomination process. If you do not support the nomination, please add the rationale of why you are rejecting the nomination so that the Department can inform the nominee.

The screenshot shows the 'Update information' section with the 'Stage selection (required)' dropdown set to 'EE Stage 4a: QUAD approved/ Dean review'. Below it is the 'Move to (required)' dropdown, which is open and shows options: 'Please choose', 'Please choose', 'EE Stage 4b: More information (Dean)', 'EE Stage 5a: Dean approved/ QUAD process', 'EE Stage 5b: Dean approved/ PVC review' (highlighted in blue), and 'EE Stage 99: Reject/ Withdraw'. The 'Stage notes' text box is visible below the dropdowns.



It is important that you tick the checkbox in the Applicants section before clicking **Save**. This confirms that your decision is final and **without checking this the nomination will not be progressed.**

Applicants	
Applicant name (APP23227)	Applicant stage EE Stage 4a: QUAD approved/ Dean review
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	
<input type="button" value="SAVE"/>	

## Next steps

Once you or the Pro-Vice Chancellor (Education) have approved a nomination, QUAD will receive automated notification by email. QUAD will then create an appointment letter from the portal to send to the External Examiner.

Most External Examiners are appointed for four years, and Departments may be changes to the nature of their contract over the period of their employment with Essex. In some cases, Departments may consider there to be exceptional circumstances around an appointment and request a contract extension for one of their External Examiners, in which case QUAD will email you with the request and the Department’s rationale for the extension.

Additionally, a Department may need to change an External Examiner’s schedule of awards and modules. In many cases, this will be uncontroversial – for example, a module made inactive will be removed from an External Examiner’s schedule until it is reinstated – but if the proposed changes are significant, QUAD will email you with a summary of proposed changes and a request for your approval.

Document review information	
Document Owner	Quality and Academic Development
Document Author	Quality and Academic Development
Document last reviewed by	Quality Officer – Luke Nash
Date last reviewed by	11/08/2020
Review frequency	Annually