

# **HEAD OF DEPARTMENT USER GUIDE**

**(Taught Provision)**

## **Nomination Portal**

**QUALITY AND ACADEMIC DEVELOPMENT  
BUSINESS SYSTEMS TEAM**



## INTRODUCTION

The External Examiners Nomination Portal is a system for managing External Examiner nominations. A Head of Department will be able to supervise and monitor their Department's External Examiner nominations and appointments through the system, with the help of this guidance. 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.

If you require more information on how to make an External Examiner nomination, issue portal access or make changes to an existing contract, please refer to the Departmental User Guide which explores these areas in full.

## 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



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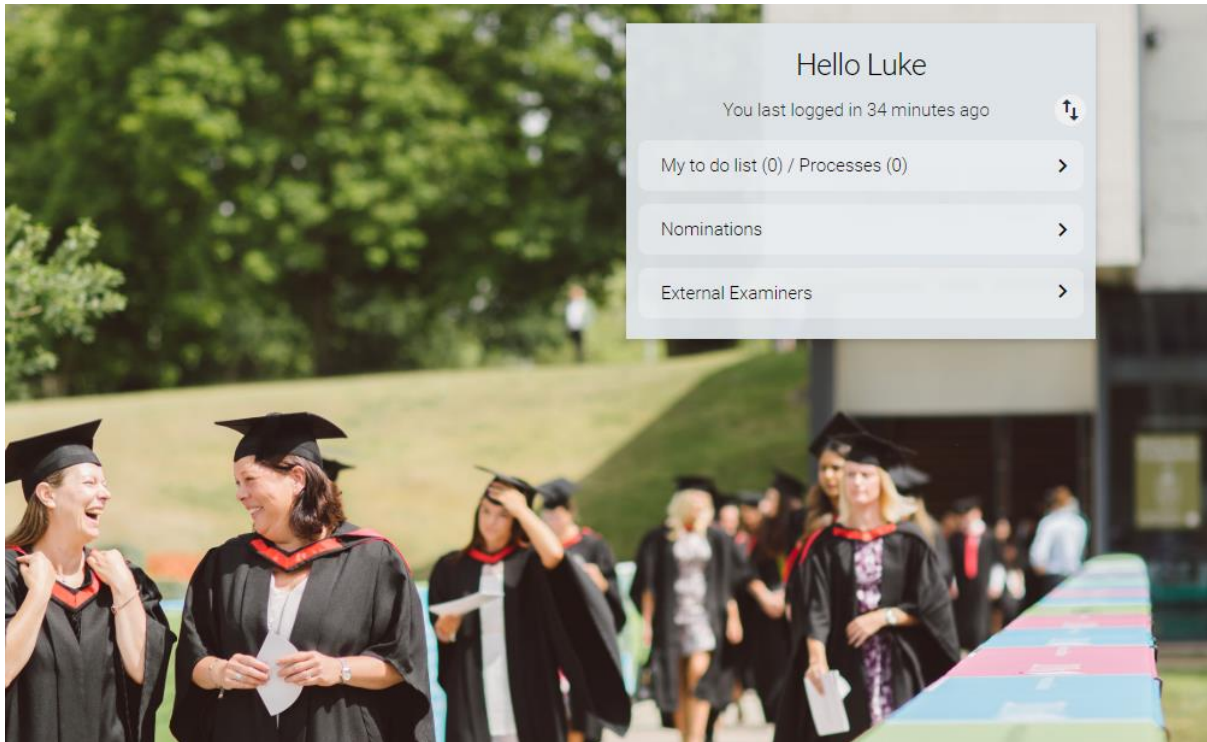
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## Home Screen

When you first log into iTrent, choose your role. To access the External Examiner Nomination Portal, choose the role **EE – Head of Department (Your Department)**.

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.

### **External Examiners**

This button will allow you to check the details of your current External Examiners and submit requests for contract changes.

There are links to External Examiner guidance and other useful documents in the buttons at the lower edge of the screen. These will be periodically updated and can be referred for updates on External Examiner processes.





# Nominations

This section of the guidance details the **Nominations** view of the Nomination Portal and outlines the processes associated with putting forward a new External Examiner.

## Recruitment summary

When you first access on the **Nominations** view, you will arrive at the **Recruitment summary** screen. This page gives a summary of all of the nominations awaiting your approval.

**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-Head of Department, 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 - Head of Department HUM (UG/PGT))'. Below the header 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 an 'Alerts' section showing '1 Requisition in total' and '0 Applicants in total'.

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

**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**.

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

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





## Step 1: Checking a new nomination

Once a new External Examiner nomination has been made, it will require review to determine whether it may be approved, more information requested, or rejected. You will receive an automated e-mail to prompt you each time a nomination needs to be reviewed.

Process Nomination

1. View authorisation 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 a nomination is rejected, the rationale for the rejection will be recorded in this section of the Portal.



## Step 2: View nominated courses

### 2. View courses/modules

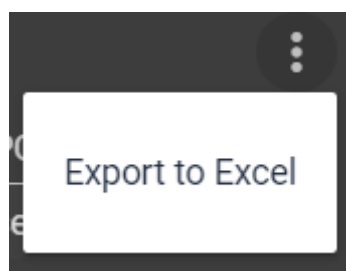
Return to the **Recruitment summary** screen. Click **View courses/modules**. This will bring up the below menu in the side bar.

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 3: Checking a nominee's CV

As part of the approval process, the CV, Right to Work documents, and any other information uploaded as part of the nomination must be reviewed. To view the External Examiner's CV, click the following button:

### 3. 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 below 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 v

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 4: Checking a nominated External Examiner's suitability

To review information provided by the nominee themselves to support their eligibility to carry out the External Examiner role click the below button.

### 4. Check external examiner 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 6: Move to requisition processing or reject nomination

When you have reviewed the details of your nomination, you can either approve it for progression to QUAD and the Deputy Dean (Education) or reject it. To register your decision, please click the below button.

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

This will bring up the below screen. Chose **EE Stage 2a: Awaiting HoD check** from the drop-down menu.

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 3a: HoD supports/QUAD review inc RTW** to progress the nomination, 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.

You will be able to record the reason for your decision in the **Stage notes** free text box; please note that these comments can be viewed by any colleague involved in the nomination process.



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	Applicant stage	
(APP23227)	EE Stage 2a: Awaiting HoD check	<input checked="" type="checkbox"/>

**SAVE**

After you tick the checkbox and click **Save**, the Quality and Academic Development Team will receive an email asking them to check the details of the nomination before moving the nomination onto the next stage: Dean Authorisation.

If you do not support the nomination, you can select to move to the Reject stage; please add the details of why you are rejecting the nomination. Once this step is completed, an email will be automatically generated and sent to QUAD, who will inform the Department administrator.



## Step 8: Nomination outcome

There are several potential outcomes that you can determine following initial review of the nomination submission. The outcome you select will be sent on to QUAD to take further action. More information on nomination outcomes is below:

- **Request for more information**  
A colleague in QUAD may send the nomination back to the Department to request more information. In this instance, an automated email will be sent to the nominated Departmental colleague for External Examiner nominations – usually the Department Manager.
- **Approved**  
Nomination has received approval by the Deputy Dean (Education). You will receive an automated email confirming this.
- **Rejection**  
If the nomination is unsuccessful, QUAD will receive an automated email following the DEPUTY DEAN (EDUCATION)'s decision. QUAD will then send a personalised email to the Department providing further information as to why the nomination was rejected.

### Next steps

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

The External Examiner will need to sign the acceptance form and return to QUAD via the External Examiner [email account](#). QUAD will upload this form onto the External Examiner's iTrent account and payroll will also receive notification. QUAD will inform the Department that the External Examiner is now officially in post. The External Examiner can now login to iTrent to view the schedule of awards and modules for which they are responsible.

Following confirmation of appointment, there are a number of documents that the Department will need to send to a new External Examiner. For a full list of the information which an External Examiner will need to be supplied with, and with whom the responsibility sits, please visit the External Examiner section of the QUAD [website](#).





## Useful Links

▶ **Criteria for nomination**

[https://www1.essex.ac.uk/quality/external\\_examiners/criteria\\_for\\_nomination.asp](https://www1.essex.ac.uk/quality/external_examiners/criteria_for_nomination.asp)

▶ **Nomination portal user guide**

[https://www1.essex.ac.uk/quality/external\\_examiners/default.asp](https://www1.essex.ac.uk/quality/external_examiners/default.asp)

▶ **Email QUAD**

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

▶ **General External Examiner Information**

[www.essex.ac.uk/quality/external\\_examiners/default.asp](http://www.essex.ac.uk/quality/external_examiners/default.asp)

Additional useful links are provided within the main tab of the portal:

The screenshot shows a navigation menu with four buttons: 'New nomination' (blue), 'Process nomination' (orange), 'View existing nomination' (green), and 'Useful links' (purple). Below these are two icons (a list icon and a grid icon) and two more buttons: 'Email QUAD' (with an envelope icon) and 'User guide/nomination criteria' (with a document icon).

Document review information	
<b>Document Owner</b>	Quality and Academic Development
<b>Document Author</b>	Quality and Academic Development
<b>Document last reviewed by</b>	Quality Officer – Luke Nash
<b>Date last reviewed by</b>	04/08/2020
<b>Review frequency</b>	Annually