# Table of Contents

Table of Contents ........................................................................................................................... 3

1 Introduction .................................................................................................................................... 6
   1.1 Intended Audience .................................................................................................................. 6
   1.2 Pre-requisites ......................................................................................................................... 6
   1.3 Objectives ............................................................................................................................... 6
   1.4 Conventions ............................................................................................................................ 6

2 Retrieve and Review Applications .................................................................................................. 7
   2.1 Logging into eVision ............................................................................................................... 7
   2.2 Applicant Searches ................................................................................................................. 7
       2.2.1 Search for Individual Applicants .................................................................................. 7
       2.2.2 Search for Groups of Applicants .................................................................................. 8
   2.3 Search Results ....................................................................................................................... 9
   2.4 Review Applications .............................................................................................................. 10
       2.4.1 Applicant Summary Header ......................................................................................... 13
       2.4.2 Personal Details ........................................................................................................... 13
       2.4.3 Application Details ...................................................................................................... 14
       2.4.4 Research ....................................................................................................................... 14
       2.4.5 Supporting Materials .................................................................................................... 15
       2.4.6 Language Tests ............................................................................................................ 15
       2.4.7 Qualifications, other Tests .......................................................................................... 16
       2.4.8 UAB Decisions ............................................................................................................. 16
       2.4.9 College History, Decisions .......................................................................................... 17
       2.4.10 Funding ....................................................................................................................... 17
       2.4.11 Other Applications ...................................................................................................... 18
       2.4.12 Fees ............................................................................................................................. 18
   2.5 Edit Applicant Contact Details .............................................................................................. 18
   2.6 View an Application as a PDF ............................................................................................. 21
   2.7 Bulk PDF Download ............................................................................................................. 23
       2.7.1 Alternative Steps for Google Chrome and Mozilla Firefox Users ................................. 26

3 Record College Decisions ............................................................................................................ 28
   3.1 Reject - Not Under Consideration ........................................................................................ 28
   3.2 Reject Application .................................................................................................................. 30
   3.3 College Unconditional Offer ............................................................................................... 32
   3.4 College Conditional Offer ..................................................................................................... 35
   3.5 Cancel College (Conditional) Offer ...................................................................................... 39
   3.6 Record Condition Outcome – Fail ...................................................................................... 41
   3.7 Record College Conditions - Pass ....................................................................................... 43

4 Financial Declaration Form ......................................................................................................... 46
Table of Contents

4.1 Run and Export the Report .................................................................................................................. 46
4.2 Mail Merge Data from Report to FDF ................................................................................................. 47
  4.2.1 Select Recipients ............................................................................................................................. 47
4.3 Edit Recipients List ............................................................................................................................... 48
  4.3.1 Sort Order of Recipients ................................................................................................................ 50
  4.3.2 Filter Recipients included in Mail Merge ...................................................................................... 50
  4.3.3 Exclude Recipients ........................................................................................................................ 51
4.4 Insert Merge Fields ............................................................................................................................... 52
  4.4.1 Formatting Merged Fields from Text to Numbers ....................................................................... 52
  4.4.2 Preview Merged Fields .................................................................................................................. 53
4.5 Review Individual FDFs ....................................................................................................................... 54
4.6 Saving Individual FDFs ......................................................................................................................... 54
4.7 Mark FDF as sent ................................................................................................................................. 55
  4.7.1 Mark FDF as sent (report) ............................................................................................................... 55
  4.7.2 Mark FDF as sent (Individually) .................................................................................................... 57
4.8 Exceptions and Other Scenarios .......................................................................................................... 59
  4.8.1 Exceptions .................................................................................................................................... 59
  4.8.2 Other Scenarios to be aware of ...................................................................................................... 59
5 Record Applicant Responses ................................................................................................................... 60
  5.1 Record Response – Accept ................................................................................................................ 60
  5.2 Record Applicant Response - Decline ................................................................................................ 61
6 Maintain Scholarship/Award Details ....................................................................................................... 65
  6.1 Add Scholarship/Award Details ........................................................................................................ 65
  6.2 Edit Scholarship details ....................................................................................................................... 67
  6.3 Delete Scholarship details .................................................................................................................. 68
7 Annual Changes ..................................................................................................................................... 70
  7.1 Award Programme Details / College Combinations Report ............................................................... 70
  7.2 College Annual Change Process ....................................................................................................... 71
8 eVision Dataviews & Admissions Reports ............................................................................................. 76
  8.1 Dataviews ......................................................................................................................................... 76
    8.1.1 Accessing Dataviews .................................................................................................................... 76
    8.1.2 Running a Dataview ..................................................................................................................... 77
    8.1.3 Exporting Dataview Results to Microsoft Excel ........................................................................ 80
  8.2 eVision Admissions Reports .............................................................................................................. 80
    8.2.1 Accessing Admissions Reports .................................................................................................... 80
    8.2.2 Running an Admissions Report .................................................................................................. 81
    8.2.3 Exporting Report Results ............................................................................................................ 84
9 Further Help & Support ......................................................................................................................... 86
  9.1 Student Systems Support Centre (SSSC) .......................................................................................... 86
  9.2 Education IT Programme (Edu IT) ................................................................................................... 86
Table of Contents

9.3 Graduate Admissions and Funding Handbook ................................................................. 86
9.4 Financial Declaration Form (section 4) ............................................................................ 86
9.5 Data Protection .................................................................................................................. 86
9.6 Document Information ...................................................................................................... 87
10 Appendices ........................................................................................................................ 88
  10.1 Appendix 1 - eVision Dataviews .................................................................................. 88
      10.1.1 Admissions & Enrolment ......................................................................................... 88
      10.1.2 Examination and Assessments .............................................................................. 88
      10.1.3 On-course Students (including historic records) .................................................... 89
      10.1.4 Other ....................................................................................................................... 89
  10.2 Appendix 2 - eVision Reports ......................................................................................... 90
      10.2.1 Pre Offer ................................................................................................................ 90
      10.2.2 Post Offer .............................................................................................................. 91
      10.2.3 College Decision Making ...................................................................................... 91
      10.2.4 Annual Changes .................................................................................................. 91
  10.3 Appendix 3 – eVision Automated Notification/Alert emails ......................................... 92
      10.3.1 Applicant Notifications ......................................................................................... 92
      10.3.2 UAB Notifications ............................................................................................... 92
      10.3.3 College Notifications ......................................................................................... 93
  10.4 Appendix 4 – Bulk PDF Download Search Criteria ....................................................... 93
  10.5 Appendix 5 – Search for Applicants Criteria ................................................................. 95
      10.5.1 Search for Individual Applicants .......................................................................... 95
      10.5.2 Search for Groups of Applicants .......................................................................... 97
1 Introduction

The purpose of this manual is to provide information and process steps to enable you to manage your graduate admissions process.

1.1 Intended Audience

This manual is intended for College Administration staff required to use eVision to support the Graduate admissions process.

1.2 Pre-requisites

It is assumed that you have a basic knowledge of using a computer, keyboard and mouse, and basic web browser knowledge.

1.3 Objectives

By the end of this course you will be able to:

- Successfully retrieve and review applications
- Accurately edit and maintain applicant contact details
- Successfully record college decisions and offers
- Accurately record college condition outcomes
- Accurately record applicant responses
- Successfully upload documents including offer letters and financial declarations
- Accurately record college scholarship offers/awards

1.4 Conventions

- Bold Text Indicates menu names.
- Italic Text Indicates window, screen or dialogue box titles.
- [F4] Keys on your keyboard are indicated in bold text enclosed in square brackets [ ].
- File > Open Moves through a navigation path are indicated with a >. In this case you would click on the File menu, then select Open
2 Retrieve and Review Applications

Colleges Administrators will be notified by a daily eVision email notification listing all new applications that have been allocated to their college for a college decision. For a description of these email notifications see Appendix 3 at the end of this manual.

2.1 Logging into eVision

To access the Quick Reference Guide with instructions on how to login and logout of eVision, please enter the URL below or use the following link and select “Access and Navigate eVision” under the eVision link.

https://www1.admin.ox.ac.uk/studentsystems/support/guides/evision/

2.2 Applicant Searches

After logging in the home screen will be displayed and the menu items listed down at the top of the screen will depend on your access to eVision.

In the home screen click on the link.

There are two eVision screen which allow authorised users to search for graduate applications in order to review, update and/or process them;

- Search for Individual Applicants
- Search for Groups of Applicants

The Applicant Search screen is displayed containing fields that may be used individually or in combination as search criteria to retrieve appropriate applications. A description of the available criteria is available in Appendix 5 at the end of this document. Wildcards and Boolean operators can also be used as part of your search criteria.

2.2.1 Search for Individual Applicants

1. Click on Search for Individual Applicants menu option which will display the Search for Applications screen.
2. Enter appropriate search criteria. Multiple search criteria can be entered.

3. Click on the **Search** button.

### 2.2.2 Search for Groups of Applicants

To search for a group of applications:

1. Click on the **Search for Groups of Applicants** menu option which will display the Search for Applications screen.
2. Multiple search criteria can be entered.

3. Leave blank or enter one or more search parameters as required and then click on [Search].

2.3 Search Results

The Process Applications screen will be displayed. For each application there will be a link to the Expected Next Action. The contents of this field will depend on the stage the application has reached in the admissions process e.g. Record Decision.

**Note:** When using Search for Groups of Applicants the results will appear alphabetically by name. Search for Individual Applicants can also be used for searching for group applicants, but the results will appear in a random order. E.g. this search can be used for searching for more than one applicant with the same surname, which is not a parameter option in the Search for Groups of Applicants.
If the selection criteria entered do not match with any graduate applications, then a message will be displayed, and you will need to select the menu to return to the option. The previous search criteria will still be in place and can either be amended or click on to remove all search criteria and reset the form.

In the column entitled *Expected next action* there will be a link to an action depending on the stage the application has reached in the application cycle. This link may be used as a shortcut to the next action. However, full details are also shown below on managing a record using the task list.

**2.4 Review Applications**

1. Click on the student number to display the applicant details.
### Process Applications

<table>
<thead>
<tr>
<th>Student Number</th>
<th>Name</th>
<th>Division</th>
<th>UAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>659886</td>
<td>Piper, Peter</td>
<td>Mathematical, Physical &amp; Life Sciences Division</td>
<td>Sub-Department of Physical and Theoretical Chemistry (ON)</td>
</tr>
<tr>
<td>112355</td>
<td>Muffet, Barbara</td>
<td>Humanities Division</td>
<td>Faculty of History (CD)</td>
</tr>
</tbody>
</table>

The tabbed application view is displayed for the selected application.
### Personal Details

- **Title**: Mr
- **Surname**: Ingleson
- **Forename**: Navy
- **Middle Names**: -
- **Preferred Name**: -
- **Sex**: Male
- **Previous Surname**: -
- **Previous Forename**: -

### Contact Details

- **Home Address**: 12 Woodwind Cottage, Brighton BN1 5PS
- **Correspondence Address**: Flat 7, Cowley Heights, Cowley, Oxford OX4 7HP
  - Date effective from: 01/Sep/2017
  - Date effective to: 30/Jun/2018
- **Email Address**: jingles@ucl.ac.uk
- **Alternative Email Address**: jingles@ucl.ac.uk
- **Telephone Number**: +44 77166 127745

### Nationality and Fee Status

- **Country of Birth**: China
- **Nationality**: China
- **Start Date of Nationality**: 15/Sep/1995
- **Other Nationality**: -
- **Do you expect to require a visa to enter the UK for your study?**: Yes
- **Confirmed Visa Required?**: This applicant will require a visa
- **Completed Course under UK Tier 4 Child Visa?**: No
- **Fee Status**: Overseas

### Ordinary Residence and Leave to Remain

- **Current Country of Ordinary Residence**: China
- **I am an EU national resident in the UK for the main purposes of full-time education**: No
- **Previous Country of Residence**: -
- **If you are not a UK or EU national but you are currently living in the UK, do you have Indefinite Leave to Remain status (which has been entered on your passport)?**: No

### Passport Details

- **Passport Number**: S123456
  - **Country of Issue**: China
  - **Issue Date**: 11/Jun/2015
  - **Expiry Date**: 10/Jun/2025
  - **Notes**: -

### Nominated Third Party

- **Name**: -

### Accommodation

- **Do you intend to apply for accommodation owned by the University?**: No
- **Do you intend to apply for accommodation owned by the college?**: Yes
- **How many adults will be accompanying you?**: 0
- **Details of any accompanying children**: -
All applications contain an Applicant Summary header section and a row of tabs.

2.4.1 Applicant Summary Header

Note: “Evidence of English Language proficiency required” will be displayed in red for an applicant who does not have English as their first language and who has either a) not provided evidence of proficiency or b) for whom a waiver has not been granted. It will also be displayed for an applicant who does have English as their first language but is not a national of a majority English-speaking country and has either a) not provided evidence of proficiency or b) for whom a waiver has not been granted.

Additional important summary information relating to the applicant and application is available via the show/hide Important information link.

Up to three additional detail lines may be displayed via the show/hide Important information link as applicable to the application:

- Fee Status is “Query”
- Applicant has declared a disability (including a description of the declared disability)
- Applicant has declared a criminal conviction

2.4.2 Personal Details

The Personal Details tab holds all personal information including contact details, passport, Visa requirements, if any, and nationality.
2.4.3 Application Details

The **Application Details** tab displays all the information relating to the application.

2.4.4 Research

The **Research** tab will only be displayed if the application is for a research degree.
Note: This Research tab is also displayed for a small number of taught courses which require applicants to answer research questions on the application form.

2.4.5 Supporting Materials

The Supporting Materials tab provides a summary of all supporting documentation as pdf files. This information may have been imported from the application form or added by the UAB when certificates are received from the applicant.

The supporting documents can be viewed as PDF files via the View Document.

2.4.6 Language Tests

The Language Tests tab displays all the information relating to the applicant’s language skills including any test results. This information may have been imported from the application form or added by the UAB when certificates are received from the applicant.

Note: The test result will appear as ‘Claimed’ under the ‘Status’ column until verified by the UAB.
2.4.7 Qualifications, other Tests

The *Qualification, other Tests* tab displays all the information relating to the applicant’s qualifications. This information may have been imported from the application form or added by the UAB when certificates are received from the applicant.

Note: The test result will appear as ‘Claimed’ under the ‘Status’ column until verified by the UAB.

2.4.8 UAB Decisions

The *UAB Decisions* tab provides a history of UAB activities and decisions completed against an application.
2.4.9 College History, Decisions

The College History, Decisions tab provides a history of College decisions recorded against an application.

2.4.10 Funding

The Funding tab provides information regarding any funding, studentship and scholarship awards.
2.4.11 Other Applications

The Other Applications tab provides information regarding any current or previous applications or study at Oxford.

2.4.12 Fees

Displays the Course Fee and Living Costs (low and high) for all years. Years 2+ are estimated amounts.

The fees and costs can be used to populate an applicant specific Financial Declaration form via an eVision report and mail merge functionality, refer to section 12.

2.5 Edit Applicant Contact Details

College Administrator may update/amend applicant contact details including Home Address, Correspondence Address, email, and telephone number(s).

1. Search for an applicant as shown in Section 2.2 above
2. Click on the student number to display the tabbed application view.

The Graduate Application screen is displayed. All available actions that can be completed against the application are held within the Task Selection menu.
Retrieve and Review Applications

Hover the mouse pointer over **Task Selection** to display the available options.

**Note:** The options available within the Task Selection list will differ depending on the status and position of the application in the admissions process.

Click on **Personal Details** to display the applicant’s details.
Click on the **Change** button for the appropriate address type

Enter the required value in the **Postcode** field

Click on the **Get Address** button.

The Get Address screen is displayed listing any matching addresses for the entered postcode.

**Note:** The Get Address function works for UK addresses only. Ensure the Country field is set to United Kingdom before using the Get Address function.

Click on the required address in the list

Click on the **Select** button
The Address section of the screen is updated to display the newly selected address.

Click on the Save button.

The Manage Personal Details – Applicant Information screen is updated to display the new address details. A record of the previous address is retained but is not visible via eVision. A button is provided to return to the tabbed application view.

Click on the Return to Application Summary button.

2.6 View an Application as a PDF

A link is provided in the Applicant Summary screen to downloaded a PDF copy of the application for printing and distribution to appropriate academic staff.
1. In the home screen click on the link.

2. Click on the View Application link.

An Open or Save prompt will be displayed by your internet browser confirming that the file has been downloaded and providing you with the option to view the PDF and/or save a local copy.

3. Click on the Open button

The application will be displayed as an adobe acrobat PDF file. If a local copy has not already been saved click on the File>Save as option on the menu bar to create a local copy.
2.7 Bulk PDF Download

The eVision Bulk PDF Download functionality allows college and UAB administrative staff to simultaneously download multiple graduate applications as individual pdfs contained within a zip file. Zip files are single files, sometimes called "archives", which contain one or more compressed files. Zip files make it easy to keep related files together and make transporting and downloading files faster and more efficient due to their compressed size. The downloaded zip file should be stored on a local/network drive before extracting the pdf application files for Tutor/Assessor review.

In this example Microsoft Internet Explorer is used to demonstrate the eVision Bulk PDF Download functionality. Alternative steps for Chrome and Firefox users are provided in Section 2.6.1 of this document.

On your eVision Home page:

1. Click on the Admissions link

The College Administrators container is displayed containing links to all eVision tools/functions appropriate for college administrative staff.

2. Click on the Application PDF Bulk Download link.

The Enter Search Criteria page is displayed containing search criteria fields for locating the required applications. Single or multiple criteria fields can be used to locate the required applications. However, only single options can be selected from the criteria lists of values, and wildcards and operators cannot be used.
3. Enter appropriate search criteria and click on the Search button.

A description of the available Bulk PDF Download criteria is available in Appendix 4 at the end of this document.

The Select Applications page is displayed containing all applications that meet the search criteria. Select applications to be downloaded as a pdf file by entering ticks into the appropriate tick-boxes. A Select All tick box is also available to select/deselect all applications.

To avoid performance issues limit the number of pdf files to be downloaded by running the search in smaller batches. The Surname parameter can help in doing this:

Any applications with a Application File Status of In Progress highlighted in red is being updated and will not be available for an hour.

4. Click in the tick boxes to select/deselect applications as appropriate.

5. Click on the Export button.

The Download Applications page is displayed containing a download link for downloading the zip file containing the pdf versions of the applications.

6. Click on the download link.

A Microsoft Windows prompt is displayed to either open the downloaded file or save it to a specific location.

7. Click on the Save As option.
The Microsoft Windows Save As window is displayed to specify a location and name for the downloaded zip file. By default the File Name is export.zip and can be changed as required.

8. Select an appropriate location.
9. Enter an appropriate File name.
10. Click on the Save button.

A Microsoft Windows download confirmation prompt is displayed.

11. Click on the Open button.

12. The zip file is opened as a new window displaying the individual pdf files contained within. Move or copy the pdf files to a local drive or network drive. The pdf filenames follow the following format - Surname, Forename 1, short course name, Application Number, all separated by underscore (_), for example: JOHNSON_KATE_DPhil_Fine_Art_1000011_01_01.pdf.

13. Copy or move the application pdf files to an appropriate location.
2.7.1 Alternative Steps for Google Chrome and Mozilla Firefox Users

If you use Chrome or Firefox, the zip file will be automatically downloaded to the Download folder (usually on the H:\ drive) which can quickly fill up if bulk pdf download is used a lot. In these browsers, right-click on the download link and specify a suitable download location for the zip file.

On the Download Applications page:

1. Follow steps 1 - 8 as shown in Section 2.6 above.
2. Right-click on the download link.
3. Click on the Save As option.

The Microsoft Windows Save As window is displayed to specify a location and name for the downloaded zip file.

4. Select an appropriate location.
5. Enter an appropriate File name.
6. Click on the Save button.

A Microsoft Windows download confirmation prompt is displayed.

7. Click on the Open button.
8. The zip file is opened as a new window displaying the individual pdf files contained within. Move or copy the pdf files to a local drive or network drive. The pdf filenames follow the following format - Surname, Forename 1, short course name, Application Number, all separated by underscore (_), for example: JOHNSON_KATE_DPhil_Fine_Art_1000011_01_01.pdf.
9. Copy or move the application pdf files to an appropriate location.
3 Record College Decisions

College Tutors/Assessors will inform their College Administrators of the appropriate decisions for each application. The College Administrators will then record the decisions in eVision. If an applicant is rejected by their preferred college this will trigger an eVision email notification to the applicant informing them that they will not be attending their preferred college. For a description of the eVision email notifications see Appendix 3 at the end of this manual.

3.1 Reject - Not Under Consideration

A college may use this option if they are full and not in a position to evaluate the application.

1. Search for an applicant as shown in Section 2.2 above
2. Click on the student number to display the Applicant Summary screen.
3. Hover the mouse pointer over .

![Task Selection](image)

**Note:** All actions available relevant to that application are available within the Task Selection menu. The options will differ depending on the status and position of the application in the admissions process.

4. Select Manage Decision & Condition link and Decision Type
5. Select **Not Under Consideration** to display the Record Decision – Not Under Consideration screen.

6. Enter the appropriate date in the Decision Date field – the date the decision was made.

7. Enter the appropriate name in the Decision Approved By field.

8. Click on the **Next** button.

   **Note:** Clicking on cancel will clear all updates and return you to the Manage Decision and Condition screen.

   A confirmation message is displayed providing a summary of the decision entered. A message will also be displayed to indicate whether or not an email will be sent to the applicant advising them of the decision. If all details are correct, you may proceed with saving the decision against the application.

9. Click on the **Save** button.

   **Note:** If changes are required to the Decision Details screen use the Back button at the bottom of the screen to return to the previous Rejection screen where updates can be made.

   A final confirmation message will be displayed. No further actions are required for this application.
3.2 Reject Application

1. Search for an applicant as shown in Section 2.2 above

2. Click on the student number to display the tabbed application view.

3. Hover the mouse pointer over Task Selection.

Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

4. Click on Manage Decision & Condition.

The Decision Type Selection screen is displayed.
Record College Decisions

5. Hover the mouse pointer over **Decision Type**.

**Note:** The options available under the Decision Type button will differ depending on the status and position of the application in the admissions process.

6. Click on the **Reject** option.

The Decision Type Selection screen is displayed.

7. Enter the appropriate date in the Decision Date field (the date the decision was made).

8. Enter the appropriate name in the Decision Maker field.

9. Click on the **Next** button.

**Note:** Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.

The Rejection confirmation screen is displayed providing a summary of the entered rejection information. A message will also be displayed to indicate whether or not an email will be sent to the applicant advising them that they will not be attending their preferred college.

10. Click on the **Save** button.

**Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Rejection screen where updates can be made.

A final Rejection confirmation screen is displayed providing a summary of the entered rejection information.
Note: A message is also displayed to indicate whether or not a Preferred College Rejection email has been successfully sent to the applicant advising them of the decision.

3.3 College Unconditional Offer

1. Search for an applicant as shown in Section 2.2 above

2. Click on the student number to display the tabbed application view.

3. Hover the mouse pointer over .

Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

4. Click on The Decision Type Selection screen is to displayed.
5. Hover the mouse pointer over **Decision Type**

Note: The options available under the Decision Type button will differ depending on the status and position of the application in the admissions process.

6. Click on **Unconditional offer**.

7. Enter the date in the **Decision Date** field (the date the decision was made).

8. Enter the appropriate name in the **Decision Maker** field.

9. Enter the appropriate date in the **Applicant Response Deadline** field.

10. Click on the **Next** button.

Note: Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.

The Unconditional Offer confirmation screen is displayed providing a summary of the entered Unconditional Offer information. If all details are present and correct you may proceed with saving the decision against the application.
11. Click on the **Save** button.

**Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Unconditional Offer screen where updates can be made.

A final Unconditional Offer confirmation screen is displayed providing a summary of the saved Unconditional Offer information. To complete the process an Offer Letter should be uploaded to the application record.

12. Click on **Upload Offer Letter**.

Any file to be uploaded must be available locally on your computer or via the University of Oxford network.

13. Click on **Browse...**

14. In the *Choose File to Upload screen* navigate to the file to be uploaded and select it.

15. Click on **Open**
You are returned to the *File Upload Screen* with the file path and file name displayed in the File field.

16. Click on .

A confirmation message is displayed confirming that the offer letter has been uploaded against the application successfully.

### 3.4 College Conditional Offer

1. Search for an applicant as shown in Section 2.2 above.
2. Click on the student number to display the tabbed application view.
3. Hover the mouse pointer over .
Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

4. Click on **Manage Decision & Condition**

The **Decision Type Selection** screen is displayed.

5. Hover the mouse pointer over **Conditional offer**

Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

6. Click on **Conditional offer**
The Record Decision: Conditional Offer screen.

7. Enter the appropriate date in the Decision Date field (the date the decision was made).
8. Enter the appropriate name in the Decision Maker field.
9. Enter the appropriate date in the Applicant Response Deadline field (not mandatory).
10. Enter the appropriate date in the Condition Deadline field.
11. Click on the Next button.

Note: Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.

The Record Decision: Conditional Offer confirmation screen is displayed providing a summary of the entered Conditional Offer information. If all details are present and correct you may proceed with saving the decision against the application.

Note: The condition will automatically default to Completion of financial declaration.

12. Click on the Save button.

Note: If changes are required to the Decision Details use the Edit Details button at the bottom of the screen to return to the previous Conditional Offer screen.

A final Conditional Offer confirmation screen is displayed providing a summary of the saved Conditional Offer information. To complete the process an Offer Letter must be uploaded to the application record.
13. Click on **Upload Offer Letter**.

Any file to be uploaded must be available locally on your computer or via the University of Oxford network.

14. Click on **Browse...**

15. In the *Choose File to Upload screen* navigate to the file to be uploaded and select it.

16. Click on **Open**
You will be returned to the *File Upload Screen* with the file path and file name displayed in the File field.

17. Click on **Upload**.

A confirmation message is displayed confirming that the offer letter has been uploaded against the application successfully.

3.5 Cancel College (Conditional) Offer

1. Search for an applicant as shown in *Section 2.2* above.

2. Click on the student number to display the tabbed application view.

3. Hover the mouse pointer over **Task Selection**.
Record College Decisions

**Note:** Cancel College Offer can only be used to Cancel conditional offers made by colleges. A Conditional Offer can only be cancelled in eVision as long as no applicant response has been recorded against it.

4. Click on **Manage Decision & Condition**

The **Decision Type Selection** screen is displayed.

5. Hover the mouse pointer over **Decision Type**.

6. Click on **Cancel college offer**

**Note:** The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

The **Cancel College Offer** screen is displayed.

**Note:** Cancellation of the offer will change the decision to Reject.

7. Enter the appropriate date in the **Decision Date** field (the date the decision was made).

8. Enter the appropriate name in the **Decision Maker** field.

9. Click on the **Next** button.

**Note:** Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.
10. Click on the **Save** button.

A final confirmation page is displayed informing you that the application has been updated.

### 3.6 Record Condition Outcome – Fail

1. Search for an applicant as shown in **Section 2.2** above.
2. Click on the student number to display the tabbed application view.
3. Hover the mouse pointer over **Task Selection**.
Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

4. Click on **Manage Conditions**.

Note: The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

The **Manage Conditions** screen is displayed. Two **Action** links are provided for recording the appropriate decision for the condition.

5. Click on **Fail** to display the Condition Details.
6. Enter the appropriate date in the Date Approved field.

7. Click on the Next button.

**Note:** Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.

The Fail Condition confirmation screen is displayed providing a summary of the entered decision information. If all details are present and correct you may proceed with saving the decision against the application.

8. Click on the Save button.

**Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Fail Condition screen.

A final Fail Condition confirmation screen is displayed providing a summary of the saved decision information. A message is displayed informing you that an email has been successfully sent to the UAB who will reject the application.

### 3.7 Record College Conditions - Pass

1. Search for an applicant as shown in Section 2.2 above.
2. Click on the student number to display the tabbed application view.
3. Hover the mouse pointer over **Task Selection**.

```
3. Hover the mouse pointer over **Task Selection**.  
```

**Note:** The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

4. Click on **Manage Conditions**.

```
4. Click on **Manage Conditions**.  
```

**Note:** The options available within the Task Selection options will differ depending on the status and position of the application in the admissions process.

The **Manage Conditions** screen is displayed. Two Outcome links are provided for recording the appropriate decision for the condition.

```
The Manage Conditions screen is displayed. Two Outcome links are provided for recording the appropriate decision for the condition.  
```

5. Click on **Pass** to display the Condition Details.
6. Enter the appropriate date in the Date Approved field.

7. Click on the Next button.

**Note:** Clicking on the Cancel button will clear all updates and return you to the Manage Decision and Condition screen.

The Manage Condition confirmation screen is displayed providing a summary of the entered decision information. If all details are present and correct you may proceed with saving the decision against the application.

8. Click on the Save button.

**Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Fail Condition screen.

A final confirmation screen is displayed providing a summary of the saved decision information. A message is displayed informing you that an email has been successfully sent to the UAB who will reject the application.
4 Financial Declaration Form

It is at this stage that you send an applicant specific Financial Declaration Form (FDF) with expected course fees and living costs to applicants who have been made an offer.

The three graduate FDF templates are available from the GAF Handbook. The fees and costs calculations are provided via an eVision report and must be used to populate the FDF template via mail merge in Microsoft Word.

Section 4.4 provides guidance on how to insert merge fields from the exported report into the FDF template. You can choose to follow this section once and then reuse this template with future exported reports.

4.1 Run and Export the Report

1. Navigate to Admissions.

2. Click on the Graduate College user – FDF Mail Merge Report link from the Graduate Admissions (College Administrator) menu.

3. Run and export the report as an Excel spreadsheet.

For general guidance relating to reports refer to eVision Running Graduate Admissions Reports QRG. See guidance over the page regarding the parameters for the Graduate College user – FDF Mail Merge Report.

4. Save the exported spreadsheet to a secure location on your network drive.
Report Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year of Entry</td>
<td>The academic year the applicant has selected to begin their programme.</td>
</tr>
<tr>
<td>Application Reporting Status</td>
<td>The type of offer which has been recorded against the application record.</td>
</tr>
<tr>
<td>Application Deadline</td>
<td>Term / month application must be completed by.</td>
</tr>
<tr>
<td>Programme Type</td>
<td>Type of programme, e.g. Postgraduate Research.</td>
</tr>
<tr>
<td>Division</td>
<td>The division providing the course programme.</td>
</tr>
<tr>
<td>Department</td>
<td>The department providing the course programme.</td>
</tr>
<tr>
<td>Programme Name</td>
<td>Name of the programme the applicant has an offer for.</td>
</tr>
<tr>
<td>College</td>
<td>The College the applicant has an offer for.</td>
</tr>
<tr>
<td>Fee Status</td>
<td>The applicant’s fee status, e.g. Home and Overseas.</td>
</tr>
<tr>
<td>Student Number</td>
<td>Useful if you only want to run the report for one offer holder at a time.</td>
</tr>
<tr>
<td>College Decision</td>
<td>The status of a college’s decision.</td>
</tr>
</tbody>
</table>

When selecting a specific parameter option, use the dynamic search box to filter the choices.

4.2 Mail Merge Data from Report to FDF

4.2.1 Select Recipients

4. Open the relevant FDF template, which is available from the GAF Handbook and save it to your network drive.

5. Select the Mailings tab from the Ribbon.

6. From the Select Recipients options, choose Use an Existing List.
7. Locate the report you exported as an Excel spreadsheet from your network drive and click **Open**.

8. There are three tabs on the Excel spreadsheet. Highlight the ‘Data_For_Mail_Merge$’ tab.

9. Ensure the ‘First row of data contains column headers’ tick box is ticked.

10. Click **OK**.

### 4.3 Edit Recipients List

Depending on which students you wish to include in the mail merge and in which in order, refer to the guidance accordingly.

- Section 4.3.1 advises you how to sort the order of recipients, e.g. students studying the same Programme Title can be grouped together.

- Section 4.3.2 guides you on how to filter the recipients, e.g. if you **only** want to include students whose fee has been calculated.

- Section 4.3.3 explains how to remove individual / groups of recipients.

If you do wish to include all records and have no requirement to sort them in a particular order, skip to section 4.4, Insert Merge Fields.

As there are three distinct graduate FDF templates to accommodate the different student groups, it is critical to ensure the correct template is used to populate the corresponding fee and costs for each set of offer holders. The following table summarises when you will need to filter and exclude offer holders in order to populate each template correctly (see filtering and excluding techniques in sections 4.3.2 and 4.3.3).
Overview of how to include the relevant offer holders for each of the FDF templates

<table>
<thead>
<tr>
<th>FDF Template</th>
<th>Mail Merge Actions Required</th>
</tr>
</thead>
</table>
| Graduate Full-Time Students | **Standard process**<br> To populate financial declaration forms for standard full-time graduate offer-holders (where no manual calculation is required in the template) using mail merge, you will need to make the following adjustments:  
  - Filter recipients by the ‘Mode of Attendance code’ column to exclude part-time students.  
  - Filter recipients by the ‘Fee Not Calc’ column to only include ‘blanks’ to remove applicants where fee has not been calculated (courses which require manual calculation – see section 4.8.1 - and those students with a fee status of query).  
  - Filter recipients by the ‘Programme Title’ column to exclude applicants who will be studying the ‘MBA’ or ‘Msc Financial Economics’ at the Said Business School. Applicants on these programmes will receive their FDF from the department.  

Non-Standard process<br> To create financial declaration forms for offer holders where the fee needs to be calculated manually it is recommended that courses are filtered for inclusion in the mail merge at individual programme level, i.e. by specific course code/name. This will enable administrators to process a group of non-standard students at a time, who are following the same programme and facilitate the checking process.  
To obtain the required fees and costs information for courses that require manual calculation you will need to refer to the relevant page of the Financial Declaration section within the Graduate Admissions Handbook. |
| Graduate Part-Time Students | **Standard process**<br> To populate financial declaration forms for standard part-time graduate offer holders (where no manual calculation is required in the template) using mail merge, you will need to make the following adjustments:  
  - Filter recipients by the ‘Mode of Attendance code’ column to exclude full-time students.  
  - Filter recipients by the ‘Fee Not Calc’ column to only include ‘blanks’ to remove applicants where fee has not been calculated (courses which require manual calculation – see section 4.8.1 - and those students with a fee status of query).  
  - Filter recipients by the ‘Programme Title’ column to exclude applicants who will be studying the ‘MSc Cognitive Behavioural Therapy’, ‘MSc Paediatric Infectious Diseases’ and ‘MSt International Human Rights Law’ in the Department for Continuing Education. Applicants on these programmes will receive their FDF from the department.  

Non-Standard process<br> To create financial declaration forms for offer holders where the fee needs to be calculated manually, it is recommended that courses are filtered for inclusion in the mail merge at individual programme level, i.e. by specific course code/name. This will
enable administrators to process a group of non-standard students at a time, who are following the same programme and facilitate the checking process.

To obtain the required fees and costs information for courses that require manual calculation you will need to refer to the relevant page of the Financial Declaration section within the Graduate Admissions Handbook.

4.3.1 Sort Order of Recipients

1. Click the Edit Recipients List icon.

2. Click the Sort option.

3. The Filter and Sort window opens.

4. From the Sort Records tab, enter the column heading that you wish to sort the records by (these are the column headings from the exported report), in the Sort by field, for example Programme Title.

5. If you wish to sort records by multiple columns, update the Then by fields.

6. Select Ascending / Descending as appropriate.

7. Click OK from the Filter and Sort window.

8. Click OK from the Mail Merge Recipients window if you don’t wish to filter the recipients.

4.3.2 Filter Recipients included in Mail Merge

11. Click the Edit Recipients List icon.

12. The Mail Merge Recipients window opens.

13. Click the Filter option.
14. The Filter and Sort window opens.

15. From the Filter Records tab, enter the column heading that you wish to filter the records by (these are the column headings from the exported report).

16. If you wish to filter records by multiple columns also, update the remaining rows as appropriate.

17. Click OK from the Filter and Sort window.

18. If a filter has been applied, there will be a filter symbol on the column heading.

19. Click OK from the Mail Merge Recipients window if you don’t want to exclude any recipients.

4.3.3 Exclude Recipients

1. To exclude any recipients from the mail merge, untick the tick box accordingly.

2. It may be useful to identify those students you wish to exclude using the sort / filter functions.

3. Click OK.
4.4 Insert Merge Fields

You now need to confirm which data from the exported report needs to be included in the FDF and where it needs to be positioned within the document.

1. Position your cursor where you would like the data item to appear on the FDF. In this example we want the student’s first name.

```
<table>
<thead>
<tr>
<th>About you and your course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
</tr>
</tbody>
</table>
```

2. Click on the bottom half of the Insert Merge Fields icon.

3. Click on the required merged field, this is the column heading on the exported report. In this example we want the applicant’s first name.

```
<table>
<thead>
<tr>
<th>Insert Merge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student_Number</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>First_Name</td>
</tr>
</tbody>
</table>
```

4. The merged field selected will now appear.

```
<table>
<thead>
<tr>
<th>About you and your course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
</tr>
<tr>
<td>«First_Name»</td>
</tr>
</tbody>
</table>
```

5. Repeat steps 2 – 4 so that you have all of the required merged fields in the correct position on the FDF.

If you have multiple fields next to each other, e.g. First Name and Surname, ensure you enter a space between them.

4.4.1 Formatting Merged Fields from Text to Numbers

The student fees and costs from the mail merge report are formatted as text and not as numbers, for example, they will appear as ‘18770’ instead of ‘18,770’ (without the comma).

```
<table>
<thead>
<tr>
<th>Course Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>£18770</td>
</tr>
</tbody>
</table>
```

Following the steps provided to ensure that the comma appears in all merged fields that should appear as a number.
1. **Right click** on the merged field, in this example it is the Course Fee for year 1.

2. **Select** **Toggle Field Codes**.

   ![Toggle Field Codes](Image)

3. The merged field now changes to something similar to the following (dependent on the field you are formatting).

   ![Merged Field](Image)

4. **Type \#,0 before the}’, see example below (minus the inverted commas, as per screenprint below).**

   ![Merged Field Example](Image)

5. Section 3.5, **Preview Merged Fields** will show you how to use the preview function, which will allow you to see the updated format.

### 4.4.2 Preview Merged Fields

1. To preview the Mail Merge, i.e. what the populated FDF will look like, click the **Preview Results** icon.

2. *The screen print on the left shows the names of the merged fields, the screen print on the right is a preview of the first student’s FDF.*

   ![Preview Merged Fields](Image)

3. If you wish to switch off the preview, click the **Preview Results** icon again.
4.5 Review Individual FDFs

1. If you wish to scroll to review the individual offer holder FDFs, you can use the Navigation icons to switch between the First, Previous, Next and Last Records in the merge.

For future Mail Merges you could choose to use the template you have created (with the merged fields) and merge with a subsequent exported report to avoid inserting merge fields every time. Follow the steps in section 12.2.1 Select Recipients to select a subsequent exported report.

4.6 Saving Individual FDFs

1. From the Finish & Merge icon select Edit Individual Documents.

2. The Merge to New Document window opens.

3. Enter 1 in both in the From and To fields.

4. Click OK.

5. A new Word Document will open. This is the personalised document for the offer holder record selected in step 3.

6. Manually review the form for that individual offer holder, e.g. remove text that may not be applicable.

7. Save the document, e.g. by using the Ctrl + S keys.

8. Navigate to the folder location you wish to save the document to.

9. Record the File name (including student name and number).

10. Click .

11. Repeat steps 1 – 11 for every student. For step 3 (the From and To Fields on the Merge to New Document window) enter the next sequential number each time so that you create an individual document for every offer holder on the exported report, (e.g. From 2 To 2, From 3 To 3 etc).
4.7 Mark FDF as sent

Once you have created an individual’s Financial Declaration Form, you must record that the FDF has been sent. By completing this step in the process, the individual’s details will not appear in any future FDF mail merge reports. This step can either be carried out by using the Mark FDF as sent report or individually via the Task Selection. To reverse the action ‘Mark FDF as Sent’ (i.e. untick the box), use the report option.

4.7.1 Mark FDF as sent (report)

1. Click on the Mark FDF as sent link from the Graduate Admissions (College Administrator) menu.

2. The Application Search screen opens.

3. Enter search criteria to find the individual, e.g. Application Number or Surname and Forename as well as entering the Award Programme Type* (mandatory).

4. Click Search.
5. From the Application Search Results screen tick the FDF Sent tick box(es).

6. Click Save.

**Note:** If the FDF has already been sent then the checkbox will already contain a tick and will display who the action was confirmed by and the date it was confirmed. To reverse this then uncheck the tick box and choose Save.

7. The Confirmed By and Date Confirmed columns will then be populated.
4.7.2 Mark FDF as sent (Individually)

1. When in the Tabbed Application View, the option is available to Mark the FDF as sent for the individual applicant.

2. Go to Task Selection > Mark FDF as sent

   ![Task Selection](image)

   **Note:** If the FDF has already been sent then the screen below will be displayed.

   ![FDF Confirmation](image)

   If you need to reverse this step, please use the Mark FDF as sent (report) guidance in 4.7.1.

3. Add a tick to the Mark FDF as sent checkbox.
Note: By ticking the box you are indicating that the applicant has an offer and a Financial Declaration Form (FDF) has been sent.
If you need to reverse this step, please use the Mark FDF as sent (report) guidance in 4.7.1.

4. You can either choose Return to Application Summary to navigate to the Application Tabbed View or
Return to List which will take you to the search results page, or Return to Search which will allow you to run a
new search, enabling you to choose a new menu option.
4.8 Exceptions and Other Scenarios

4.8.1 Exceptions

The following programme types have been excluded from the calculation and the fees will not appear and will therefore require manual population of the template by Colleges:

- Award programmes with modular fees
- 1 + 3 award programmes
- MSc teaching award programmes (Learning and Teaching, Teacher Education and Applied Linguistics for Language Teaching)
- Programmes with whole course fees
- Graduate Entry Medicine

A full list of courses can be found within the Financial Declaration section of the GAF Handbook.

4.8.2 Other Scenarios to be aware of

- There may be a reason for the fee calculation to be switched off for an individual centrally by Student Fees and Funding. If the fee calculation has been disabled for an individual student (the ‘Fees Not Calc’ column will show ‘This application is set to off-system calculations only’) only the student’s name, address etc will come through on the report. In this scenario it is recommended that you contact student.fees@admin.ox.ac.uk before populating the FDF manually with any fees and costs information.

- Reduced Fee liability - Students already awarded an MPhil, BPhil or MSt Legal Research by the University of Oxford may have their DPhil fee liability reduced by three terms. If this applies the Course Fees will be replaced with an indicative University continuation charge (at rates for the current admissions round) for the final year of the course (or final two years in the case of part-time DPhil students). Colleges that also charge a College Continuation Charge will need to amend this to also include the charge applicable at their college in that year of entry, and will then be required to manually adjust the overall total and grand total ranges.

- CDT’s where the first year is spent away from Oxford – for these programmes the report will show zero fees and costs for year one. For subsequent years it will show fees and cost information that reflects inflation applied to what would otherwise have been the first year fees and costs.

- DPhil students who commence their studies in Hilary or Trinity Term – actual first year fees cannot be provided by the report, as student’s starting in Hilary or Trinity Term will pay one or two terms fees at the following year’s rate which is not yet confirmed. Guidance on how to manually calculate estimated fees for these students can be found within the Financial Declaration section of the GAF Handbook.

- The department is responsible for the administration of the FDF process for courses for which they collect the fees, details of which are available in the Financial Declaration section of the GAF handbook. Students who will matriculate onto any of these courses will still appear in the Graduate College user – FDF Mail Merge Report but the college are not required to issue the FDF to the student as it will be sent out by the department.
5  Record Applicant Responses

College Administrators will record the applicant responses to any college offers made. If an applicant declines a college offer this will trigger an eVision email notification to the appropriate UAB Administrator instructing them to withdraw the application. For a description of the eVision email notifications see Appendix 3 at the end of this manual.

5.1  Record Response – Accept

1. Search for an applicant as shown in Section 2.2 above.
2. Click on the student number to display the tabbed application view.
3. Hover the mouse pointer over Task Selection.
4. Click on Record Applicant Response.

**Note:** All actions available relevant to that application are available within the Task Selection menu. The options will differ depending on the status and position of the application in the admissions process.

5. Select Accept from the Select Applicant Response drop-down list
6. Click on the **Next** button.

   **Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Rejection screen where updates can be made.

   The *Record Applicant Response* screen is updated to display a Response Date field for recording the date the applicant’s response was received by the college.

   ![Record Applicant Response Screen](image)

7. Enter the appropriate Response Date.

8. Click on the **Save** button.

   **Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Rejection screen where updates can be made.

   The *Record Applicant Response* confirmation screen is displayed providing a summary of the entered applicant response information. If all details are present and correct you may proceed with saving the decision against the application.

   ![Record Applicant Response Confirmation Screen](image)

5.2 **Record Applicant Response - Decline**

1. Search for an applicant as shown in Section 2.2 above.

2. Click on the student number to display the tabbed application view.

3. Hover the mouse pointer over **Task Selection**.
4. Click on **Record Applicant Response**.

**Note:** All actions available relevant to that application are available within the Task Selection menu. The options will differ depending on the status and position of the application in the admissions process.

The **Record Applicant Response** screen is displayed containing Applicant Summary and Response Summary sections. The Response Details section of the screen provides the fields required for recording the applicant’s response. All fields marked with an asterisk (*) are mandatory and must be completed.
5. Select **Decline** from the Select Applicant Response drop-down list

6. Click on the **Next** button.

**Note:** If changes are required to the Decision Details use the Back button at the bottom of the screen to return to the previous Rejection screen where updates can be made.

The *Record Applicant Response* screen is updated to display a Reason for Decline field and Response Date field for recording the reason for the response and the date the college received the applicant’s response.

7. Select the appropriate **Reason for Decline** from the drop down list

8. Enter the appropriate **Response Date**

9. Click on the **Next** button.

**Note:** If changes are required to the Response Details use the Back button at the bottom of the screen to return to the previous screen where updates can be made.

The *Record Applicant Response* screen is displayed. If all details are present and correct you may proceed with saving the response against the application.

10. Click on the **Save** button.
**Note:** If changes are required to the Response Details use the Back button at the bottom of the screen to return to the previous screen where updates can be made.

The *Record Applicant Response* confirmation screen is displayed providing a summary of the entered applicant response information.
6 Maintain Scholarship/Award Details

6.1 Add Scholarship/Award Details

College Administrators should only record college scholarship awards. Details of other scholarships and funding are gathered through different processes.

1. Search for an applicant as shown in Section 2.2 above.

2. Click on the student number to display the tabbed application view.

3. Hover the mouse pointer over Task Selection.

Note: All actions available relevant to that application are available within the Task Selection menu. The options will differ depending on the status and position of the application in the admissions process.

4. Click on Manage Scholarships to display the Manage Scholarships screen.

5. Click on Add New Scholarship
The Add Scholarship screen is displayed.

6. Select one Expense type that the College scholarship is funding from the dropdown list.

7. Choose Next.

8. If the college scholarship is funding this Expense type in full for the duration of the course, select Full from the Full or Partial dropdown list. If it is only funding this Expense type partially for the duration of the course, select Partial.

9. Only if the scholarship is partial, enter the total amount (across the course duration) of funding for this Expense type. If the scholarship is covering the Expense type in full, leave the total amount field empty.

10. If you wish, you can also record the name of the scholarship.

11. If the scholarship is funding other Expense types, you can select the appropriate copy option.

12. Choose Save and Continue.
13. You can edit the Full or Partial, Total amount and Name of scholarship fields before you save the information. Remember to adjust the amount of funding for partial scholarships to reflect the amount for the individual Expense types across the course duration. Then choose **Save and Continue**.

14. To add a new record choose **Save and Add New Record** or **Save and Finish** to finish the scholarship entry.

15. Click on the **Save** button

The final **Add Scholarship** confirmation screen is displayed containing the entered scholarship details.

16. Choose **Return to Funding Summary** to review and further edit the scholarship entry if required.

### 6.2 Edit Scholarship details

1. Select **Edit** against the Expense Type that needs to be modified.

12. Modify the necessary fields and select **Cancel** to ignore the change or **Next** to accept the modification.
13. Select **Cancel** to modify the changes or **Next** to complete the Scholarship change.

14. Select **Back** to enter different details or **Save** to complete the changes.

15. You can either **Return to Application Summary** which will take you to the search results page, **Return to List** which will allow you to run a new search, **Return to Search** enabling you to choose a new menu option or **Return to Admissions** which will display the details of the Scholarship chosen.

### 6.3 Delete Scholarship details

1. Select **Delete** against the Expense Type that needs to be deleted.

16. Either select **Cancel** to ignore the change or **Delete Record** to accept the deletion.
17. You can either (Application Summary), (Return to List) which will take you to the search results page, (Return to Search) which will allow you to run a new search, (Return to Admissions) enabling you to choose a new menu option or (Return to Funding Summary) which will display the details of the Scholarship chosen.
7 Annual Changes

This section describes the functionality that will be used by College administrators to review the data that will control which courses they will be offering in the next admissions cycle.

The process steps for the annual review of the course data includes the following stages;

- GAF will initiate the review process and will email departments and colleges when the data is ready to be reviewed with instructions; departments and colleges will be given a deadline to review the data by.
- UAB and college administrators will access their course information via eVision screens and be able to make updates for the next year. Updates made at this point will not affect the current admissions cycle.
- UAB and college administrators will be able to run a report to review the current data and circulate to any academic staff who sign off changes.
- UAB administrators will be able to enter changes to course data in eVision and enter approval at course level.
- College administrators will be able to enter changes and approval for the courses they want to offer at the college.
- GAF will be able to monitor progress for each UAB and College and send reminders to any UABs and Colleges who have not completed their review process by the deadline.
- Once UAB administrators have submitted their changes, the data will be available to divisional offices for review and final sign off. Divisional users will be able to review the completed data via the Award Programmes Details report.
- Once the data has been submitted by divisional offices, GAF will be able to access the data and review it before roll-over takes place.
- GAF will be able to make changes manually to data after all data has been reviewed where late changes are submitted by UAB and college administrators by email, etc.
- At an agreed time in advance of the start of the new admissions cycle, the Student Systems Support Centre will run a process to update the current data with the reviewed data which will be used in systems (application form, eVision, etc. for the new cycle).

7.1 Award Programme Details / College Combinations Report

This report shows award programmes open to application during the current admissions cycle.

11. Select Award Programme Details / College Combinations report from within the Graduate Admissions Report container.

![Microsoft Reports Screen](image)

**Note:** Suggested selection criteria: College = Your college, Currently Offered = Yes

12. Enter appropriate criteria and select Run Report.
7.2 College Annual Change Process

1. To start the Review process select the College Annual Change Process link.

13. The review screen for Colleges will include all Course/College combinations for Open Direct courses for the user’s college.

Note: Export to Excel and review course data before using College Annual Change Process eVision functionality.
14. Users can select a specific department or a specific course title.

**Note:** Running with no specific search parameters will take up to 2 minutes to return your results, therefore we strongly recommend you run the report and note any changes then search for and update just those courses that need to be changed.

15. The search results are then displayed.

16. Select the Published Programme Code to be checked.
17. Choose whether to offer the Programme in the next academic year

**Note:** The review status of this course is displayed for your interest. Not Approved yet means the department have not approved the course data is correct yet. Do not wait for the department to approve the course set up before you make your changes.

18. Select **Save**.
19. Select

<table>
<thead>
<tr>
<th>Published Programme Code</th>
<th>Division</th>
<th>UAB</th>
<th>Published Programme Title</th>
<th>Mode of Attendance</th>
<th>Start Term</th>
<th>Offered in Current Year</th>
<th>Offered Next Academic Year</th>
<th>Offered Course Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>RM_MS1_CCC</td>
<td>Mathematical, Physical &amp; Life Sciences Division</td>
<td>Mathematical Institute (BK)</td>
<td>MSc by Research in Mathematics</td>
<td>Full-time</td>
<td>1M</td>
<td>Yes</td>
<td>Yes</td>
<td>002510</td>
</tr>
</tbody>
</table>

Showing 1 to 11 of 11 entries
20. Once all the updates for the college have been completed for this review, select the **Confirm** button.

21. A further screen will then be displayed where the user can supply details of the Approver and the Date that approval was given.

22. The Single sign on or the Approver’s full name can be entered.

23. Select **Confirm** and a confirmation window is displayed.

24. Select **Continue**.

**Note:** Course data can be reviewed by any user via the Award Programme Details report and Award Programme Details / College Combinations report.

GAF can monitor progress of the annual changes review and will send reminders to department and college administrators and divisions who have not yet completed their review.

If further changes are required after the college course data has been confirmed, then those changes will need to be communicated to GAF by email and GAF will be able to make the changes on behalf of the College.
8 eVision Dataviews & Admissions Reports

8.1 Dataviews

Dataviews provide information about various aspects of the applicant and student lifecycle. All dataviews can be exported to Excel for further data manipulation. In order to access eVision Dataviews you will need to have the appropriate permissions assigned to your eVision login. This is managed by your local Information Custodian.

You will also need to ensure that your preferred browser supports pop-ups. For further guidance on this, please contact your local IT Support in the first instance as the steps vary according to the type and version of browser you are using.

For descriptions of the available eVision Dataviews see Appendix 1 at the end of this manual.

8.1.1 Accessing Dataviews.

1. Log into eVision

2. Click on the link at the top of the eVision home page.

The Reporting for staff -Dataviews screen is displayed. The Dataviews are grouped under four main headings: Admissions and Enrolment; Examinations and Assessments; On-course Students (including historic records) and Other Dataviews.

![Reporting for staff -Dataviews](image-url)
8.1.2 Running a Dataview

Dataviews share a common functionality and all work in the same way. In this example the Submitted Graduate Applications dataview is used to demonstrate functionality common to all dataviews – only the individual parameters available for each dataview.

1. Click on the link at the top of the eVision home page.

The Reporting for staff -Dataviews screen is displayed.

2. Click on link for the dataview you wish to run e.g. Submitted Graduate Applications.
The Microsoft Reports Screen is displayed for entering relevant parameter values to restrict the dataview results to only those records you are interested in. The available parameters will vary according to the selected dataview.

3. To select a value from a parameter drop down list, you can either scroll down the list or use the filter box to find the value of interest.
4. If multiple values are supported, untick ‘All’ or click ‘Uncheck All’ and then tick the checkboxes next to relevant options.

5. Click on the Run Report button at the bottom of the page.

The results will appear in a new ‘Report Viewer’ Tab opened in your internet browser.

The dataview results are divided into two sections:

- **Search Parameters** – the parameters used to run the dataview are displayed at the top of the page, as well as the date the dataview was run, who by and the total number of rows (records) returned.

- **Results** – the main section consists of a row for each application, student or other types of records depending on the nature of the report. A total of 35 records are displayed on each page.

6. Navigate through the dataview results by using the tool bar at the top of the page.
8.1.3 Exporting Dataview Results to Microsoft Excel

1. Select and run the required dataview.
2. Click on the drop arrow next to the Export icon on the Tool bar at the top of the page.

3. Click on the Excel option

Depending the browser you are using, you will then be asked if you want to Open or Save the export.

The first tab of the excel spreadsheet will display the University’s conditions for using applicant and student data (Data Supply Conditions), the second tab will display the parameters used to generate the report (Parameters) and the third tab will show the dataview results.

8.2 eVision Admissions Reports

A standard set of eVision Graduate Admissions Reports is available to all GAF, UABs and College administrators. Unlike dataviews, these are only available to those users that have access to the Admissions area of eVision. To request access, please contact your Information Custodian.

The admissions reports provide information on applications to assist the monitoring of applications in the admissions process. All Admissions reports can be exported to Excel for further data manipulation.

Ensure that your preferred browser supports pop ups. For further guidance on this, please contact your local IT Support in the first instance as the steps vary according to the type and version of browser you are using.

For descriptions of the available eVision Admissions Reports see Appendix 2 at the end of this manual.

8.2.1 Accessing Admissions Reports.

1) Log into eVision

2) Click on the link at the top of the eVision home page.

The Admissions page is displayed containing the Admissions reports at the bottom of the page. The Dataviews are grouped under four main headings: Pre Offer; Post Offer; College Decision Making and Annual Changes.
8.2.2 Running an Admissions Report

eVision reports share a common functionality and all work in the same way. In this example the Graduate Applicants College – Current Status report is used to demonstrate functionality common to all reports – only the individual parameters available for each report differ.

1. Click on the link at the top of the eVision home page.

2. Click on the name of the report you wish to run e.g. Graduate Applicants College – Current Status

The Microsoft Reports Screen is displayed. The parameters listed will vary according to the purpose of the report.
Try to make your report as specific as possible by selecting and entering the relevant parameter values to restrict the report to only those records you are interested in.

3. To select a value from a parameter drop down list, you can either scroll down the list or use the filter box to find the value of interest.

or

4. If multiple values are supported, untick ‘All’ or click ‘Uncheck All’ and then tick the checkboxes next to one or more value(s).
At any point you can reset your search parameters back to the default, by clicking on the Reset Report Parameters button in the Report Selector section at the bottom of the page.

- Some reports may include date parameters, which default to 1/1/1900 12:00:00 AM. Unless you wish to enter an alternative date using the calendar icon, these should not be changed otherwise the report will not return any results.

5. Click on the Run Report button at the bottom of the page.

A new Report Viewer tab is opened in your internet browser window containing the report results.

6. Click on the Report Viewer tab

The report is divided into two sections:

- **Search Parameters** – the parameters used to run the report are displayed at the top of the page, as well as the date the report was run, who by and the total number of rows (records) returned.

- **Results** – the main section consists of a row for each application, student or other types of record depending on the nature of the report. A maximum of 35 records are displayed on each page.
8.2.3 Exporting Report Results

To export the report details:

1. Select and run the required report.

2. Click on the drop down arrow next to the Export icon on the Tool bar at the top of the page.

3. Select the format in which you wish to export the results from the drop down menu. Excel is the recommended option.

When exporting dataview results, the first tab of the excel spreadsheet will display the University’s conditions for using applicant and student data (Data Supply Conditions), the second tab will display the parameters used to generate the report (Parameters) and the third tab will show the dataview results.
Further Help & Support

9 Further Help & Support

9.1 Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University's student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre website:

http://www.admin.ox.ac.uk/studentsystems/

9.2 Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford’s IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

https://projects.it.ox.ac.uk/student-systems-projects

9.3 Graduate Admissions and Funding Handbook

This handbook is designed to be a single resource for information about the procedures and policies that underpin all graduate admissions and funding processes.

https://www.ox.ac.uk/gafhandbook

9.4 Financial Declaration Form (section 4)

Refer to contact details below for the following types of queries.

<table>
<thead>
<tr>
<th>Type of Query</th>
<th>Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate admissions process and templates</td>
<td><a href="mailto:graduate.admissions@admin.ox.ac.uk">graduate.admissions@admin.ox.ac.uk</a></td>
</tr>
<tr>
<td>Financial Declaration Forms</td>
<td><a href="mailto:student.funding@admin.ox.ac.uk">student.funding@admin.ox.ac.uk</a></td>
</tr>
<tr>
<td>Student fees and fee liability</td>
<td><a href="mailto:student.fees@admin.ox.ac.uk">student.fees@admin.ox.ac.uk</a></td>
</tr>
<tr>
<td>Technical eVision and Mail Merge</td>
<td><a href="mailto:student.systems@admin.ox.ac.uk">student.systems@admin.ox.ac.uk</a> / 01865 (2)84848</td>
</tr>
<tr>
<td></td>
<td>Lynda.com</td>
</tr>
<tr>
<td></td>
<td>Your local IT support</td>
</tr>
</tbody>
</table>

9.5 Data Protection

You should familiarise yourself with the University’s policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/compliance/dataprotection/policy/

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml
9.6 Document Information

This document is subject to change; please ensure you have the latest version.

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Version</th>
<th>Summary of Changes</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 Sep 2015</td>
<td>0.1</td>
<td>First draft</td>
<td>Chris Glynn</td>
</tr>
<tr>
<td>21 Sep 2015</td>
<td>0.2</td>
<td>Minor Updates after internal review</td>
<td>Chris Glynn</td>
</tr>
<tr>
<td>29 Sep 2015</td>
<td>0.3</td>
<td>Minor Updates after internal review</td>
<td>Chris Glynn</td>
</tr>
<tr>
<td>26 Oct 2015</td>
<td>0.4</td>
<td>Minor Updates after internal review from Esther Thomas</td>
<td>Chris Glynn</td>
</tr>
<tr>
<td>04 Feb 2016</td>
<td>1.0</td>
<td>Final Draft</td>
<td>Avril Harrison</td>
</tr>
<tr>
<td>08 Feb 2016</td>
<td>1.2</td>
<td>Added Scholarship updates from Graduate Funding Department</td>
<td>Martin Eley</td>
</tr>
<tr>
<td>13 May 2016</td>
<td>1.3</td>
<td>Updates to reports and dataviews section and formatting corrections</td>
<td>Chris Glynn</td>
</tr>
<tr>
<td>14 Nov 2016</td>
<td>1.4</td>
<td>Added Annual Changes</td>
<td>Martin Eley</td>
</tr>
<tr>
<td>07 Dec 2016</td>
<td>2.0</td>
<td>Language and test score screen updates. Further help and Support page also updated.</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>10 Oct 2017</td>
<td>2.1</td>
<td>Financial Declaration Form and Fees tab</td>
<td>Julie Hickman</td>
</tr>
<tr>
<td>12 Dec 2016</td>
<td>2.2</td>
<td>Updated guidance regarding Formatting Merged Fields from Text to Numbers, running reports for individual offer holders and using the Mode of Attendance column for filtering full/part time applicants.</td>
<td>Julie Hickman</td>
</tr>
<tr>
<td>19 Dec 2016</td>
<td>2.3</td>
<td>Updated with 9.2 screens</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>09 Feb 2017</td>
<td>2.5</td>
<td>Update to section 2.3.12 on Fees tab.</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>18 Dec 2017</td>
<td>2.6</td>
<td>Updated section on FDF; removal/correction of references to MPLS pilot, together with Adam Evans’ checks.</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>17 Nov 2017</td>
<td>2.7</td>
<td>Updated with the Improvements for 28th November, inc. FDF changes</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>20 Nov 2017</td>
<td>2.8</td>
<td>Further updates based on Esther’s feedback</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>24 Nov 2017</td>
<td>2.9</td>
<td>Edits to Appendix</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>18 Dec 2017</td>
<td>3.0</td>
<td>Updates to FDF section 4</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>07 Feb 2018</td>
<td>3.1</td>
<td>Update to include UAB Assessment Report and Targets Report</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>06 Mar 2018</td>
<td>3.2</td>
<td>PDF Bulk Download, addition of Surname (a-z) parameters</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>03 Aug 2018</td>
<td>3.3</td>
<td>Removal of Disability and Criminal Conviction parameters</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>04 Aug 2018</td>
<td>3.4</td>
<td>Removal of Criminal Convictions report</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>03 Aug 2018</td>
<td>3.5</td>
<td>Combined fee and August enhancements</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>19 Dec 2018</td>
<td>3.6</td>
<td>Finalised</td>
<td>Abi Taylor</td>
</tr>
<tr>
<td>19 Dec 2018</td>
<td>3.7</td>
<td>Updates from Adam Evans</td>
<td>Abi Taylor</td>
</tr>
</tbody>
</table>
Appendices

10 Appendices

10.1 Appendix 1 - eVision Dataviews

Dataviews provide information about various aspects of the applicant and student lifecycle. The Dataviews are categorised and grouped under four headings: Admissions and Enrolment; Examinations and Assessments; On-course Students (including historic records) and Other Dataviews.

10.1.1 Admissions & Enrolment

These Dataviews show details of applicants and offer holders, up to the point of initial registration.

<table>
<thead>
<tr>
<th>eVision Dataviews</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Offer Library</td>
<td>This dataview has been designed for the Undergraduate Admissions and Outreach team to enable them to review and check the standard undergraduate offers set up in the SITS:Vision Offer library.</td>
</tr>
<tr>
<td>Undergraduate Offer Outcomes</td>
<td>This dataview provides details of offer outcomes of all UCAS applications where the initial decision was either C (Conditional Offer) or U (Unconditional Offer). It includes details of the offer, the applicant and their response.</td>
</tr>
<tr>
<td>Submitted Graduate Applications</td>
<td>This dataview has been designed to support the graduate admissions process providing full details of submitted graduate applications including those that have yet to be checked and released by Graduate Admissions and Funding (GAF). It will be of interest to a wide range of users from the GAF, Scholarship Panels, University Admitting Bodies (UABs/Departments) and Colleges to assess and monitor applications throughout the admissions cycle. In addition to providing key application details in a report format (which can be exported to MS Excel), users can download separate PDF files containing the individual’s application form and supporting materials such as CVs, references and written work, or download a single Application File containing all of the documentation relating to an individual application.</td>
</tr>
<tr>
<td>Graduate Scholarship Dataview - Applicants</td>
<td>For each graduate application this dataview provides the details of the Oxford Scholarships offered (central, divisional and college), and for those applicants who took up their place, their current student status and on-course details.</td>
</tr>
<tr>
<td>Graduate Scholarship Dataview - On-Course Students</td>
<td>For each graduate application this dataview provides the details of the Oxford Scholarships offered (central, divisional and college), recorded against their application record.</td>
</tr>
<tr>
<td>Freshers</td>
<td>This dataview lists new students who are expected to arrive for study at the start of each year (UG, undergraduate) or term (PG, postgraduate / VRO, visiting or recognised), and displays basic person and award programme details. This Dataview is intended for download as an MS Excel file for manipulation by the user.</td>
</tr>
<tr>
<td>Matriculation</td>
<td>This report lists new students who are expected to arrive who must attend a matriculation ceremony, and displays basic person and programme of study details. This dataview is intended for download as an Excel file for manipulation by the user.</td>
</tr>
</tbody>
</table>

10.1.2 Examination and Assessments

These Dataviews provide access to the First Public Examination and Final Honour School outcomes, and details of performance in individual examinations.
<table>
<thead>
<tr>
<th><strong>eVision Dataviews</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Examination Results (print-friendly)</td>
<td>Student Year outcomes, Final Award and associated results. Includes Average Classification/Mark, Position in Class and Position in Cohort. Intended for export to PDF.</td>
</tr>
<tr>
<td>Examination Results (data-export)</td>
<td>Student Year outcomes, Final Award and associated results. Includes Average Classification/Mark, Position in Class and Position in Cohort. Intended for export to Excel.</td>
</tr>
<tr>
<td>Year Outcome / Final Award</td>
<td>This dataview provides a view of the final award and/or year outcome for all students within the selected parameters, once these have been released. This Dataview is intended for download as an MS Excel file for manipulation by the user.</td>
</tr>
<tr>
<td>Student Assessments</td>
<td>This dataview provides details of a student’s programme of study and assessment details within the selected parameters, including marks or grades once they have been released. It is intended for download as an MS Excel file for manipulation.</td>
</tr>
<tr>
<td>Exam Results Class List</td>
<td>Provides a view of the released Year Outcomes or Final Awards for each student within the selected parameters. For the selected Academic Year, it returns a list of Student Names, their College, Award Programme and Classification, grouped by examinations in alphabetical order.</td>
</tr>
<tr>
<td>Factors Affecting Performance Report</td>
<td>This report allows college users to view their students’ FAP outcomes</td>
</tr>
</tbody>
</table>

### 10.1.3 On-course Students (including historic records)

These dataviews show the record of each Award Programme attempted by each student.

<table>
<thead>
<tr>
<th><strong>eVision Dataviews</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Student Search</td>
<td>Provides information about all students including their personal details and specifics of their Award Programme.</td>
</tr>
<tr>
<td>All Students</td>
<td>This dataview provides information about all students including their personal details and specifics of their award programme. Users can also click on the student number, which will provide a drill-through to the Individual Student dataview. This MS Dataview is intended for download as an Excel file for manipulation by the user.</td>
</tr>
<tr>
<td>Research Students</td>
<td>This dataview provides information about all research students including their personal details, specifics of their award programme, thesis details, supervisor information and details of transfer and confirmation of status. Users can also click on the student number, which will provide a drill-through to the Individual Student dataview. This Dataview is intended for download as an MS Excel file for manipulation by the user.</td>
</tr>
</tbody>
</table>

### 10.1.4 Other

<table>
<thead>
<tr>
<th><strong>eVision Dataviews</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Programmes Dataview</td>
<td>This dataview provides information about award programmes and provides basic and core programme details including length, JACS (Joint Academic Coding System), UCAS, (Universities and Colleges Admissions Service) codes, and award information. This Dataview can be used on an individual programme basis or downloaded as an MS Excel file for manipulation by the user.</td>
</tr>
</tbody>
</table>
10.2 Appendix 2 - eVision Reports

The following Graduate Admissions Reports are available to GAF, UABs and College administrators and provide information on applications to assist in the admissions process. The reports are categorised and grouped under four headings: Pre Offer; Examinations and Assessments; College Decision Making, and Annual Changes.

<table>
<thead>
<tr>
<th>eVision Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>English Language Tests and Waivers</td>
<td>Provides details of English Language Tests and Waivers for graduate applicants</td>
</tr>
</tbody>
</table>

10.2.1 Pre Offer

These reports provide information on applications relevant prior to making offers.

<table>
<thead>
<tr>
<th>eVision Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Applications – UAB Assessment Report</td>
<td>The 'UAB Assessment Report’, shows additional information for UABs to help with assessment of applications (including previous qualifications)</td>
</tr>
<tr>
<td>Graduate Applications – All Incomplete Report</td>
<td>The ‘Incomplete Graduate Applications Report’, shows all active Graduate Programme applications that are incomplete as at the current date. The report will show the clearance checks (i.e. required submissions) pertaining to each application and whether each has been received or not as at the current date.</td>
</tr>
<tr>
<td>Graduate Offer and Intake Target Report</td>
<td>This 'Graduate Offer and Intake report’ has been set up to help monitor the progress of the application cycle. Intake and Offer Targets (where provided) have been included alongside current numbers of applications, offers and acceptances (card form returned).</td>
</tr>
<tr>
<td>Graduate Applications – Missed Deadline Report</td>
<td>The ‘Incomplete Or Completed Too Late For Specified Deadline Applications Report’ will provide information about active Graduate Programme applications that have been submitted ahead of, but not completed in time for, a specified submission deadline for the course in question. Ordinarily these applications would be deemed to have missed the deadline in question, but the UAB will use this report to identify any applications that could arguably be ‘rescued’ back into the deadline and included with the corresponding gathered field.</td>
</tr>
<tr>
<td>Graduate Applications – Final Too Late Report</td>
<td>The ‘Final Too Late Applications Report’ lists the applications that have missed all of the deadlines for a given course, and were completed too late for consideration in the current cycle; i.e. there are no remaining submission deadlines for the application to slip into and the application will be discarded.</td>
</tr>
<tr>
<td>Graduate Applications–Awaiting Further Submissions</td>
<td>The ‘Final Too Late Applications Report’ lists the applications that are awaiting submissions of further documentation in support of their application for a given course.</td>
</tr>
<tr>
<td>Multiple Graduate Applications Report</td>
<td>The report allows Graduate Admissions and Funding (GAF) and Departments (UABs) to track the progress of applications with multiple applications. The report returns all applicants with more than one application.</td>
</tr>
</tbody>
</table>
10.2.2 Post Offer

These reports provide information relevant to processing applications once an offer has been made.

<table>
<thead>
<tr>
<th>eVision Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data for Mail Merge</td>
<td>Graduate admission requires informing applicants about the outcome of their application statuses, sending out letters through email and by post [in special circumstances]. This process requires mass mail merging: the departments, colleges and Graduate Admission &amp; Funding [GAF] uses their own methods in order to generate letters.</td>
</tr>
<tr>
<td>Multiple Offer Holders Report</td>
<td>The reports will allow Graduate Admissions &amp; Funding (GAF) to assist Colleges to make a decision as to which College an applicant could be admitted to, as well as chase the applicant to make a prompt decision on which course/college to accept.</td>
</tr>
</tbody>
</table>

10.2.3 College Decision Making

These reports provide information relevant to processing applications once an offer has been made.

<table>
<thead>
<tr>
<th>eVision Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Applicants College – Current Status</td>
<td>Current Status report, will show the current status of all offer holders applications within the College Allocation process for the current cycle. The users will require the ability to export and then email the results from the report, particularly in support of the clearing process (i.e. by filtering against College Allocation Status = ‘In Clearing’).</td>
</tr>
<tr>
<td>Graduate Applicants College – History</td>
<td>College Allocation History report, shows the history of college decision making for the applications relating to a given academic year which is specified in the user input parameters. This history is obtained from the CAP Distribution Log (SRS_CDL).</td>
</tr>
<tr>
<td>Graduate Applicants College – Clearing</td>
<td>Clearing Report, is required specifically to support the clearing process. The users will require the ability to export and then email the results from the report to colleges who will have the ability to view a list of students that are in the clearing stage of the process.</td>
</tr>
</tbody>
</table>

10.2.4 Annual Changes

These reports provide information relevant to processing applications once an offer has been made.

<table>
<thead>
<tr>
<th>eVision Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Programme Details</td>
<td>This report provides details of the current award programmes in the system that applicants can apply to.</td>
</tr>
<tr>
<td>Award Programme Details / College Combinations</td>
<td>This report provides details of the current award programmes and college combinations in the system that applicants can apply to.</td>
</tr>
</tbody>
</table>
### 10.3 Appendix 3 – eVision Automated Notification/Alert emails

The tables below provide information on the eVision notification/alert emails that are automatically generated and sent to appropriate and relevant parties when specific activities are completed on the eVision system.

#### 10.3.1 Applicant Notifications

<table>
<thead>
<tr>
<th>Notification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Application</td>
<td>eVision sends an email notification to an applicant when they have started their online application.</td>
</tr>
<tr>
<td>Application Submitted</td>
<td>eVision sends an email notification to an applicant when they have submitted their application form</td>
</tr>
<tr>
<td>Reference Submitted</td>
<td>eVision sends an email notification to an applicant when their referee has submitted a reference in support of their application</td>
</tr>
<tr>
<td>Application Complete</td>
<td>eVision sends an email notification to an applicant when their application is complete and being processed by GAF</td>
</tr>
<tr>
<td>Application Incomplete</td>
<td>eVision sends an email notification to an applicant when their application is marked incomplete and further documents need sending. <strong>Note:</strong> This notification will be switched off at peak times, and will be reviewed by the Graduate Admissions Office.</td>
</tr>
<tr>
<td>Application Too Late</td>
<td>eVision sends an email notification to an applicant when their application is too late</td>
</tr>
<tr>
<td>Reject - Preferred College</td>
<td>eVision sends an email notification to an applicant when their application is rejected by their preferred college.</td>
</tr>
</tbody>
</table>

#### 10.3.2 UAB Notifications

<table>
<thead>
<tr>
<th>Notification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Application</td>
<td>eVision sends a daily email notification to the appropriate UAB Administrator team which lists any new applications which are complete and ready for assessment.</td>
</tr>
<tr>
<td>Application Complete</td>
<td>eVision sends an email notification to the appropriate UAB Administrator team when an applicant uploads additional item(s) of supporting material are uploaded for a complete application</td>
</tr>
<tr>
<td>College to be assigned</td>
<td>eVision sends a daily email notification to the appropriate UAB Administrator team which lists all applications which have been rejected by a College and which need to be assigned to a different college.</td>
</tr>
<tr>
<td>Failed College Condition</td>
<td>eVision sends an email notification to the appropriate UAB Administrator team when a College records that an applicant has failed a college condition.</td>
</tr>
<tr>
<td>Declined College Offer</td>
<td>eVision sends an email notification to the appropriate UAB Administrator team when a College records that an applicant has declined college offer</td>
</tr>
<tr>
<td>Application Withdrawn</td>
<td>eVision sends an email notification to the appropriate UAB Administrator team when GAF records that an applicant withdraws at any point during the admissions process</td>
</tr>
</tbody>
</table>
10.3.3 College Notifications

<table>
<thead>
<tr>
<th>Notification</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Application</td>
<td>eVision sends a daily email notification to the appropriate College Administrator team which lists any new applications which have a UAB offer and are assigned to their college for review and decision.</td>
</tr>
<tr>
<td>Failed UAB Condition</td>
<td>eVision sends an email notification to the appropriate College Administrator team when an applicant has failed UAB condition(s).</td>
</tr>
<tr>
<td>Declined UAB Offer</td>
<td>eVision sends an email notification to the appropriate College Administrator team when the UAB records that an applicant has declined UAB offer (and is withdrawn).</td>
</tr>
<tr>
<td>Application Withdrawn</td>
<td>eVision sends an email notification to the appropriate College Administrator team when GAF or UAB records that an applicant withdraws at any point during the admissions process.</td>
</tr>
</tbody>
</table>

10.4 Appendix 4 – Bulk PDF Download Search Criteria

The following provides a description of the available search criteria to locate required applications as part of the Bulk PDF Download functionality. Single or multiple criteria fields can be used to locate the required application. However, only single options can be selected from the criteria lists of values e.g., it is not possible to select multiple Award Programmes as a search criterion. Wildcards and operators cannot be used in any criteria field.

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UAB</strong></td>
</tr>
<tr>
<td><strong>Division</strong></td>
</tr>
<tr>
<td><strong>College</strong></td>
</tr>
<tr>
<td><strong>Award Programme</strong></td>
</tr>
<tr>
<td><strong>Programme Type</strong></td>
</tr>
<tr>
<td><strong>Year of Entry</strong></td>
</tr>
<tr>
<td><strong>Application Deadline</strong></td>
</tr>
<tr>
<td><strong>Application Status</strong></td>
</tr>
<tr>
<td><strong>UAB Decision</strong></td>
</tr>
</tbody>
</table>
**Initial UAB Decision Recorded After**  By default this criterion is blank and will return any applications with an initial UAB decision recorded after a specified date. Enter a date to limit the search to only applications with an initial UAB decision recorded after the specified date.

**College Decision**  List of values containing all possible college decisions e.g. Pending, Conditional Offer, etc. Select an Award Programme to limit the search to only applications to the selected Award Programme.

**Surnames**  By default this parameter will bring back all surnames. Select a letter from the From and To dropdown fields before running the search to narrow the results returned into small batches. e.g. From A To D.
10.5 Appendix 5 – Search for Applicants Criteria

The following provides a description of the available search criteria for College Administrators to locate required applications. Single or multiple criteria fields can be used in combination with wildcards and operators to locate the required application(s). However, only single options can be selected from the criteria lists of values, e.g., it is not possible to select multiple Award Programmes as a search criterion.

10.5.1 Search for Individual Applicants

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Number</td>
<td>This free-text field can be used to enter a Student Number as a parameter to restrict the search to only applications submitted by a specific applicant.</td>
</tr>
<tr>
<td>Surname</td>
<td>This free-text field can be used to enter a Surname as a parameter to restrict the search to only applications submitted by applicants with a specified surname. This parameter is not case sensitive.</td>
</tr>
<tr>
<td>Forename</td>
<td>This free-text field can be used to enter a Forename as a parameter to restrict the search to only applications submitted by applicants with a specified forename, e.g. Jones. This parameter is not case sensitive.</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>This free-text field can be used to enter a Preferred Name as a parameter to restrict the search to only applications submitted by applicants with a specified preferred name. This parameter is not case sensitive.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>This date field can be used to enter a Date of Birth as a parameter to restrict the search to only applications submitted by applicants with a specified date of birth. Dates can be entered using the calendar icon or by manually typing the date in the dd/mmm/yyyy format e.g. 24/SEP/1971.</td>
</tr>
<tr>
<td>College</td>
<td>By default College Administrators will only be able select their own college(s) from the list of values.</td>
</tr>
<tr>
<td>Division/Department</td>
<td>The list of values contains all UABs/Departments listed in ascending alphabetical order e.g. African Studies Centre, Blavatnik School of Government, etc. By default, this parameter is set to ALL and will return applications for any/all UABs. Enter an appropriate University Admissions Board (UAB) as a parameter to restrict the search to only applications submitted for a specified UAB. For example, entering a UAB of Department of Pharmacology will return only applications submitted for the Department of Pharmacology.</td>
</tr>
<tr>
<td>Award Programme</td>
<td>The list of values contains all graduate Award Programmes in ascending alphabetical order, e.g. DPhil Clinical Medicine. By default, this parameter is blank and will return applications for any/all Award Programmes. Enter an appropriate Award Programme as a parameter to restrict the search to only applications submitted for the specified Award Programme. For example, entering an Award Programme of DPhil Clinical Medicine will return only applications for the DPhil Clinical Medicine Award Programme.</td>
</tr>
<tr>
<td>Attendance Mode</td>
<td>The list of values contains the two Attendance Modes, Full Time, and Part Time. By default, this parameter is set to ALL and will return applications with any/all Attendance Modes. Enter an appropriate Attendance Mode as a parameter to restrict the search to only applications submitted for Full Time or Part Time modes. For example, entering an Attendance Mode of Full Time will return only applications with a full time attendance mode.</td>
</tr>
</tbody>
</table>
### Year of Entry

The list of values contains all academic years in ascending numerical order, e.g. 2015/2016 Academic Year, 2016/2017 Academic Year, etc.

Enter an appropriate Year of Entry as a parameter to restrict the search to only applications submitted for a specified Academic year e.g. 2015/16. For example, entering a Year of Entry of 2016/2017 will return only applications for that specified year of entry.

### Term of Entry

The list of values contains all academic terms in ascending date order, e.g., Michaelmas, Hilary, and Trinity terms. By default this parameter is set to ALL and will return applications for any/all terms of entry.

Enter an appropriate Term of Entry as a parameter to restrict the search to only applications submitted for a specified academic term of entry e.g. Trinity. For example, entering a Term of Entry of Trinity will return only applications with a Trinity term of entry.

### Application Deadline

The list of values contains all possible application deadlines listed in ascending date order e.g. November Deadline, Early January Deadline, etc. By default, this parameter is set to ALL and will return applications for any/all application deadlines.

Enter an appropriate Application Deadline as a parameter to restrict the search to only applications submitted by a specified deadline e.g. November. For example, entering an Application Deadline of November will return only applications submitted with a November deadline.

### Fee Status

The list of values contains the all available fee statuses in ascending alphabetical order e.g. European Union, Home, Overseas. By default this parameter is set to ALL and will return applications with any/all Fee Status.

Enter an appropriate Fee Status as a parameter to restrict the search to only applications with a specified Fee Status, e.g. Home. For example, entering a Fee Status of Home as a parameter will return only applications submitted with a Home fee status.

### Application Status

The list of values contains all possible application statuses listed e.g. Active, Withdrawn, Card Form Processed. By default this parameter is set to ACTIVE and will return only active applications.

Enter an appropriate Application Status as a parameter to restrict the search to only applications with a specified Application Status, e.g. Home. For example, entering an Application Status of Home as a parameter will return only applications with a Home status.

### UAB Decision

The list of values contains all possible UAB decisions e.g. Pending, Conditional Offer, etc. By default this parameter is set to All Decisions (excluding Rejects) and will return any applications with a UAB decision excluding rejected applications.

Enter an appropriate UAB Decision as a parameter to restrict the search to only applications with a specified UAB Decision, e.g. Conditional Offer. For example, entering a UAB Decision of Conditional Offer will return only applications with a Conditional UAB offer.

### College Decision

The list of values contains all possible College decisions e.g. Conditional Offer, Unconditional Offer, etc. By default this parameter is set to All Decisions and will return all applications.

Enter an appropriate College Decision as a criterion to restrict the search to only applications with a specified College Decision, e.g. Conditional Offer. For example, entering a College Decision of Conditional Offer will return only applications with a Conditional College offer.

### On Hold

The list of values contains Yes and All values. By default this parameter is set to All and will return any applications whether they are on hold or not.
Enter Yes to restrict the search to only applications placed on hold by the UAB.

10.5.2 Search for Groups of Applicants

The following fields can be used:

- College
- Division/Department
- Award Programme
- Attendance Mode
- Year of Entry
- Term of Entry
- Application Deadline
- Fee Status
- Application Status
- UAB Decision
- College Decision
- On Hold