

# TargetX overview for PGR academic reviewers

ARM Data and Systems / Postgraduate Research Service, UEA  
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# What we'll cover

- Transition to TargetX: brief overview
- Your tasks as academic selectors
- Key points and guidance

# TargetX: what is it?

- TargetX is UEA's new admissions system for postgraduate applications, run on Salesforce
- In use for PGR applications since August 2019
- It replaces the following tools in use since 2011:
  - ApplyYourself (AY) – application system
  - Connect – relationship management system
  - AppReview – selector review system

# Advantages of TargetX

- Highly configurable, can evolve with us
- Clean interface via web browser
- Tablet and mobile friendly
- All tools (e.g. form + review) in a single system
- Dynamic application form – so applicants only see the questions they need to answer
- Easier for applicants to apply to different projects
- Referees don't need to create a log-in
- Longevity – Salesforce is widely used & respected

# Timescales: key periods

## Which systems have PGR Service been using?

Up to July 2019: only AY / Connect / AppReview

August and September 2019: finishing on AY etc **and** introducing TargetX  
(This is our quietest period of the year for PGR applications.)

From October 2019: only Target X

## Which student start dates have been available on each system?

On AY/Connect/AppReview: start dates up to 1 October 2019

On TargetX: start dates from 1 January 2020

(Plus one test project for 1 October 2019 start – Biosciences GSO team)

# PGR application types, TargetX

## 1. Research-led project PGR form – LIVE when projects are

This allows applicants to explain their fit to the project. May be able to develop additional sections for specific competitions in future.

## 2. Applicant-led PGR form – LIVE & working well

This allows each applicant to include their proposal as well as a personal statement, and to name a School and potential supervisor.

## 3. Rotation PhD programme form – LIVE & working well

Tailored for applicants to the NBI Rotation PhD programme.

## 4. Scheduled for development:

- Visiting Research Student form (currently use applicant-led form)
- Professional doctorate / Suffolk upload forms (not yet needed)

# Process: applicant proposal

**Applicant submits an application with a proposal they wrote themselves**

1. PGR Service carry out standard checks on application.
2. PGR Director assigns a potential primary supervisor (FMH, HUM, SSF only).
3. Primary supervisor looks at application and chooses a second reviewer.
4. Second reviewer looks at application and recommends interview / reject.
5. Primary supervisor finalises their recommendation of interview / reject.
6. PGR Service processes rejection or passes applicant to interview stage.
7. Primary supervisor makes recommendation after interview, either unconditional or conditional offer or reject.
8. PGR Service processes rejection or asks HoS/PGR Director to confirm offer. (This may or may not include funding, depending on the context.)
9. PGR Director or Head of School confirms that offer can be made.
10. PGR Service makes offer to applicant (or processes rejection).

# Process: project application

## Applicant submits an application to a project we have advertised

1. PGR Service carry out standard checks on application.

(We already know the primary supervisor since we advertised the project.)

2. Primary supervisor looks at application and chooses a second reviewer.

3. Second reviewer looks at application and recommends interview / reject.

4. Primary supervisor finalises their recommendation of interview / reject.

5. PGR Service processes rejection or passes applicant to interview stage.

(For competitions such as NRP/ARIES DTP this will be for panel interview stage.)

6. Primary supervisor makes recommendation after interview, either unconditional or conditional offer, **put on reserve list**, or reject.

7. PGR Service processes rejection or asks HoS/PGR Director to confirm offer.

(For competitions such as NRP/ARIES DTP this will also check funding.)

8. PGR Director or Head of School confirms that offer can be made.

9. PGR Service makes offer to applicant (or processes rejection).

# How do I log in?

To log in, go to

[uea.my.salesforce.com](https://uea.my.salesforce.com)

Recommended browser:

Google Chrome

(Safari, Firefox are also fine; don't use Edge)

**On the initial set-up of your account**

(and each time you log on at a new computer)

**you will get an email for a Verification Code**

# Key points to note (1)

- **Setting up your report**

- The first time you use the system, it may not be clear where to go.
- After you've used your report once, it will appear in your **Reports** tab and will be easier to find. To find it, follow the [How-To Guide](https://portal.uea.ac.uk/postgraduate-research/pgr-application-review) available at [portal.uea.ac.uk/postgraduate-research/pgr-application-review](https://portal.uea.ac.uk/postgraduate-research/pgr-application-review)
- This should guide you to a report which contains the tasks you need to carry out on each of the applications you can access.
- Your report contains a group of incomplete tasks, then, under these, all completed tasks which have been live within the last six months.
- You can set your report up to send you a digest email at a particular time every day/week/month, whenever the report has tasks (incomplete or complete). Click the down arrow next to **Edit** at the top right, and selecting **Subscribe**, set frequency, click "Add conditions to this report", set **Record Count** greater than zero, then **Save**.

# Key points to note (2)

- **Applications are taking up to a minute to fully load / are messy**
  - This is because the system needs to render all of the documents.
  - Each part of the application has a header page then the content.
  - In some applications there are multiple consecutive header pages with no content between; ARM are trying to address this as a priority.
  - In summary: these are known problems we are seeking to improve.
- **You can access applications outside your School/Institute**
  - This is similar to SITS/e:Vision, the UEA student records system.
  - Each academic reviewer has a report which contains just the tasks that they need to take action on.
  - We will lock things down more over time where this is possible.
  - If you do find yourself in a task that's not for you, close the task, don't press submit. There's a clear trail so we can see who did what.

# Key points to note (3)

- **I want to reject but I need to select a second reviewer!**
  - It's good practice to have two colleagues review each application, and helps protect against complaints of prejudice or bias.
  - If the application is for a project we have advertised, you should usually select the person you would have interviewed applicants with, so that they get a sense of the quality of the overall field.
  - If the application is for a proposal that the applicant has written themselves, you could select your School or Institute PGR Director, in case there may be other colleagues who might consider the proposal.
  - In practice you can select anyone in your School or Institute, or a related research field, to provide the second review.

# Guidance on using TargetX

## Technical help

You can contact the ARM Data and Systems team just as you could do for technical support with AppReview. At present, we recommend that you email [arm.dataandsystems@uea.ac.uk](mailto:arm.dataandsystems@uea.ac.uk) for support.

## How-To guide

- A How-To guide with step-by-step instructions for academic review of PGR applications is available at [portal.uea.ac.uk/postgraduate-research/pgr-application-review](http://portal.uea.ac.uk/postgraduate-research/pgr-application-review).
- The guide has been added to the online help within TargetX.
- Feedback on this will help us improve it for other academic selectors – contact ARM D&S as above if you have comments.