

# TargetX for PGR: Guidance for Academic Selectors in SSF

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## Background

Postgraduate research applicants must now apply through the new system TargetX, which replaces previous systems including AppReview, ApplyYourself and Connect.

TargetX runs off the well-established Salesforce platform and has many new features including the ability for people to apply using their mobile phones or tablets. Previously UEA has been using one application form which caters for approximately 2,000 different courses. TargetX forms are more intuitive for applicants to find the PhD project or research degree course that they want to apply for, and for referees to upload a reference. The system has the capacity to continue to evolve to meet our needs and to incorporate more of our PGR recruitment and selection processes over time.

## What you need to do first

If you are an academic reviewer about to start using TargetX, please follow the steps and training guides on <https://portal.uea.ac.uk/postgraduate-research/pgr-application-review> to get your access set up and to log in for the first time. TargetX can be found at <https://uea.my.salesforce.com>; your user name will be your **UEA email address** rather than your UEA log-in. If you do not have access to TargetX and need it urgently, contact ARM Data and Systems at [arm.dataandsystems@uea.ac.uk](mailto:arm.dataandsystems@uea.ac.uk).

## Are there any tasks waiting for me?

You have an individual report of your tasks, which is called **PGR Academic Reviews – Joan Bloggs**, where Joan Bloggs is replaced by your name. If you have a long surname, the report name will instead be of the form **PGR Academic Reviews – J Bloggs-Bloggs**.

The guidance above should have helped you find your report on the system, and explained how to set up the facility to subscribe to it if you want to have daily, weekly or monthly email reminders. You can also set it as a favourite report using the star button towards the top right.

For most colleagues, the first time you log in, this report will have 0 records.

If you have any records showing in this report, this means that we are expecting you to take action for those applicants. The type of task required is determined by the Application Review Type field. You can find more details explaining what you need to do for each specific task below.

For every type of task, you need to do the following:

- Click on the Application Review **number**, which is a link to the review page.
- Click on the **Read Application** button in the top right corner. (Sometimes you may need to click the down arrow to see the Read Application option).
- Click on **Academic Recommendation** in the top left corner. Boxes with a red outline show information you must enter before choosing Submit. You can also enter information in boxes without a red outline.
- When you submit the form, it will pass the application to the next review task in the sequence – see the flowchart on page 3 of this guidance.

## How do I see all of the unallocated applications for my School?

You can find all applications which have not yet been allocated to a potential primary supervisor as follows:

- Click on **Reports** at the top of the screen.
- Click on **All Folders** from the menu at the left of the screen.
- Click on **PGR Service** from the main part of the screen, then **PGR Academic Bundle Reports**.
- Click on **SSF – Social Sciences** and then choose your **School** (DEV, ECO, EDU, LAW, NBS, PSY or SWK).

Within the relevant report in your School folder, you can look at an application as follows:

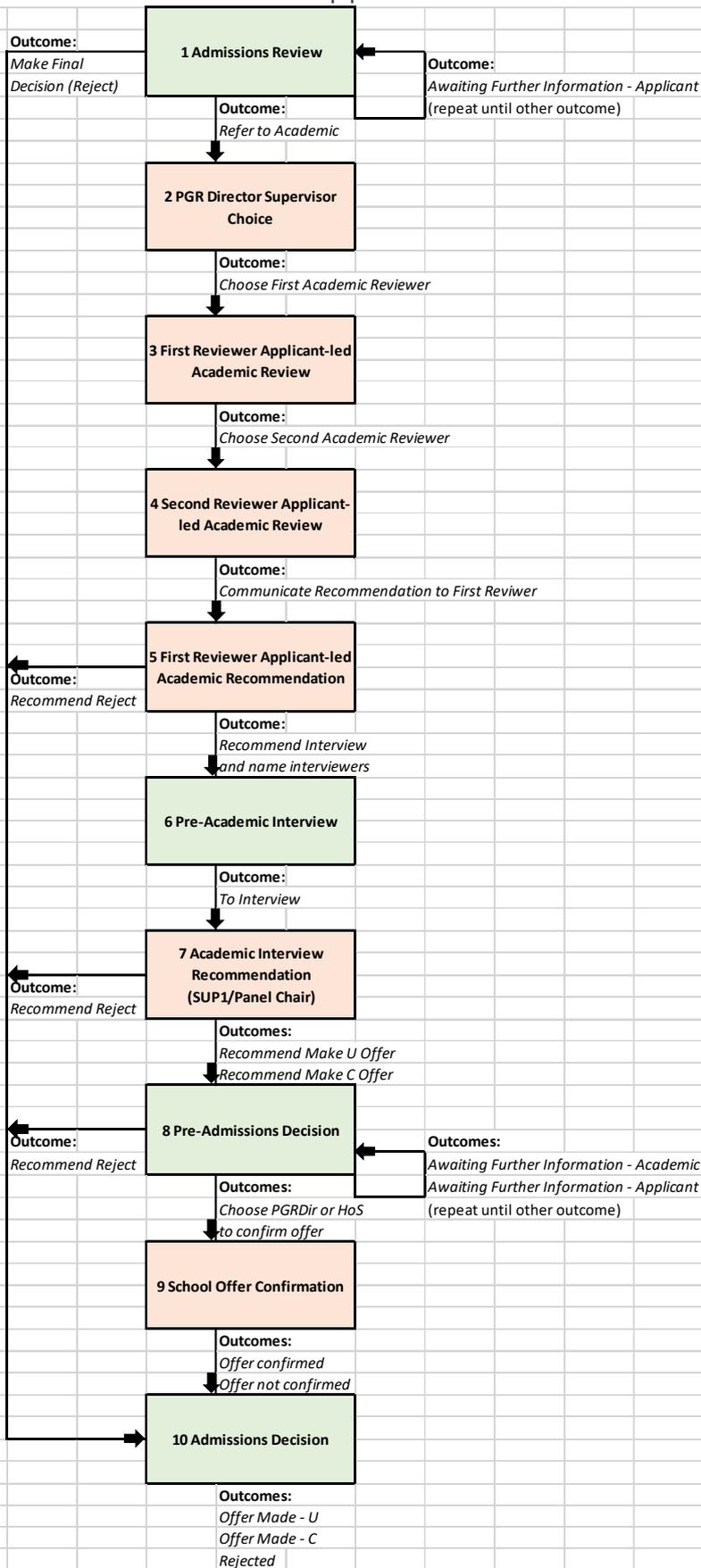
- Click on the Application Review **number**, which is a link to the review page.
- Click on the **Read Application** button in the top right corner. (Sometimes you may need to click the down arrow to see the Read Application option).
- Wait for the application documents to load – this may take up to a minute if there are many documents.
- Scroll down the application using the **Bookmarks** section at the left to navigate quickly.
- **Do not** enter anything in the Scorecard section for Academic Recommendation at the left unless you are the PGR Director or have been given permission by them to do so.
- **For DEV/EDU/NBS applicants/selectors:** use the guidance below to leave comments on an application if you are interested in being the primary supervisor for this applicant. In future admissions cycles we will work to implement a more advanced way for SSF colleagues to leave comments linked to an application on TargetX, but there has been insufficient time to develop this for the 2019-20 cycle.
- **For ECO/LAW/PSY/SWK applicants/selectors:** **contact the PGR Director by email** if you are interested in being the primary supervisor for this applicant.

## Guidance notes for particular Schools

School	Further notes
DEV	<p>The PGR Director recognises that many colleagues in DEV may wish to express interest in supervising proposals, and would find it easier not to handle this via email (unless there are confidential issues involved). Rather than emailing the PGR Director, for this year you can leave comments to express interest by selecting <b>Academic Recommendation</b> in the left hand column and then typing a brief note in the <b>Additional Comments</b> field on an application, including your name and date. Please do not delete others' comments, and do not submit the task – just close the page and your comments will be saved.</p> <p>DEV colleagues also have access to a report of applications which have been assigned to a first reviewer already, which matches previous practice for the School.</p>
ECO	No further notes – please contact the PGR Director by email regarding applicants.
EDU	<p>The PGR Director recognises that many colleagues in EDU may wish to express interest in supervising proposals, and would find it easier not to handle this via email (unless there are confidential issues involved). Rather than emailing the PGR Director, for this year you can leave comments to express interest by selecting <b>Academic Recommendation</b> in the left hand column and then typing a brief note in the <b>Additional Comments</b> field on an application, including your name and date. Please do not delete others' comments, and do not submit the task – just close the page and your comments will be saved.</p>

LAW	No further notes – please contact the PGR Director by email regarding applicants.
NBS	<p>Applications are notionally assigned by the PGR Service to one of the seven NBS research themes based on the supervisor nominated by the applicant. Applications are assigned to the head of that research theme group (“Head of Group”) instead of the PGR Director, and there is a report for each research theme group rather than an overall NBS PGR report. If it is not clear which research theme the application belongs to, the application will be assigned to the PGR Director for consideration.</p> <p>The PGR Director recognises that many colleagues in NBS may wish to express interest in supervising proposals, and would find it easier not to handle this via email (unless there are confidential issues involved). Rather than emailing the PGR Director or Head of Group, for this year you can leave comments to express interest by selecting <b>Academic Recommendation</b> in the left hand column and then typing a brief note in the <b>Additional Comments</b> field on an application, including your name and date. Please do not delete others’ comments, and do not submit the task – just close the page and your comments will be saved.</p>
PSY	<p>Most PSY applications are project-based and applications will automatically be passed to the primary supervisor for the project rather than going via the PGR Director. These project applications won’t appear on the report of unassigned applications for PSY.</p> <p>For any PSY application where an applicant has submitted their proposal themselves, the PGR Director will assign a supervisor, and these will then no longer appear on the report of unassigned applications. Contact the PGR Director by email regarding applicants.</p>
SWK	No further notes – please contact the PGR Director by email regarding applicants.

# TX Admissions Review: Applicant-led to PGR Director



**Flowchart:**

Green boxes (1, 6, 8 and 10) are tasks carried out by the Postgraduate Research Service.

Red boxes (2, 3, 4, 5, 7 and 9) are tasks carried out by academic selectors as follows:

- tasks 2, 9 by the PGR Director;
- tasks 3, 5, 7 by the first reviewer (proposed primary supervisors);
- task 4 by the second reviewer if first reviewer wants to shortlist, or PGR Director if first reviewer rejects the applicant