

Digital & Information Services  
Applications Management

# PG Reports

## User Guide

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## Getting Started

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The PG Reports SharePoint site can be accessed here – [Enter Live Link here].

*NB: If you do not have access to this site, please contact the Microsoft Technologies Development Team via the [Service Desk](#) and request access – please advise whether you require access as a School Submitter or as an Approver.*

## Searching on the Site

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It is possible to search the list for any existing reports by using the Search box at the top of the site whilst the School Reports list is open:



Enter a Student ID or Student Name to filter the list.

# PG Report Submitters

## Viewing Reports

Navigate to the School Reports List.

You should only be able to see reports for the school you are listed under.

There are various views set up, prefiltered to the Report Status – you can switch between these at any point:

ID ↑	Student ID	Student	School	Form Type	Status	Actions	Submitted By	Submitted Date	Actioned
29	12345678	Student D	Law	Nomination of Examiner	In Review	View report	Ewen, William	1/21/2026 1:22 ...	

## Submitting a new Report

Navigate to the School Reports List.

Click **+Add new item**.

Mandatory fields, depicted with a red asterisk, must be completed before you can click **Save**.

The report will show with Status **Pending** to begin with, the system will then validate the report, the Status will change to **Validating** and depending on whether you have added an attachment or not will determine what happens next. *Note: you may need to refresh your screen to view the Status changes.*

**Please note: we cannot remove the system fields Apply label from the view – please leave it set to None.**

## Submitting a Report with no attachment

If a report has been submitted with no attachment, the system will mark the report as **Returned** and an email will be sent to the Submitter, similar to the below:

Your report could not be submitted for review because no document was attached.  
Please add the required attachment and then resubmit the report.

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**Report Type:** Nomination of Examiner  
**Student Name:** Rebecca  
**Student ID:** 12345678

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**What to do next**

1. Open the report item in SharePoint.
2. Add the required attachment.
3. Resubmit the report (as per the on-screen instructions).

If the issue persists with documents attached, please raise a Service Desk call by emailing [servicedesk@abdn.ac.uk](mailto:servicedesk@abdn.ac.uk) or using the chat facility at <https://myit.abdn.ac.uk>

School Reports ☆									
ID	Student ID	Student	School	Form Type	Status	Actions	Submitted By	Submitted Date	Actioned
48	12345678	Rebecca	Law	Nomination of Examiner	Returned	View report Resubmit	[Redacted]	2/25/2026 10:15...	

If the application is opened, the Report History field (under heading Audit) should show that the Report failed validation.

**Audit**

Report History      Last Workflow Error

[Redacted] William (2/26/2026 3:18 PM):  
Report failed validation, no attached documents were found.      Validation Failed

[Redacted] William (2/26/2026 3:18 PM):  
Permissions updated successfully

[Redacted] William (2/26/2026 3:18 PM):  
Report Submitted - Validation Starting

### Submitting a Report with an attachment

If a report has been submitted with an attachment, the system will mark the report as **In Review** and an email will be sent to the Submitter informing them, similar to the below:

The report you submitted is now awaiting review.

**Report Type:** Nomination of Examiner

**Student Name:** Rebecca

**Student ID:** 12345678

You will be notified once the review has been completed.

School Reports ☆									
ID	Student ID	Student	School	Form Type	Status	Actions	Submitted By	Submitted Date	Actioned
49	12345678	Rebecca	Law	Nomination of Examiner	In Review	View report	[Redacted]	2/25/2026 10:19...	

### Resubmit a Report

To resubmit a report that has failed validation because no attachment was present:

- Locate the application with Status **Returned**,
- Double-click the line to open it, or click **View Report** under **Actions**,
- Scroll down to **Attachments**,
- Click **Add or remove attachments**, browse for and select your file,
- Click away from the box to save.

**Please note: you can also click Edit all, Add attachments and then click Save.**

- Close the report by pressing the **X** at the top right of the application and click the blue **Resubmit** button.



ID ↑ ▾	Student ID	Student	School	Form Type ▾	Status	Actions
48	12345678	Rebecca	Law	Nomination of Examiner	Returned	<a href="#">View report</a> <a href="#">Resubmit</a>

- A panel will open on the right-hand side of the screen, click **Resubmit**.
- The Status will update to **Validating** then change to **In Review**. *Note: you may need to refresh your screen to view the Status changes.*

## Editing a Report

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Editing of reports should only be possible when an application is **Returned**.

When a report is **In Review**, all fields will be read only for Submitters.

## Notifications

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As a report submitter, you will receive an email in the following circumstances:

- When a report has successfully been submitted and is In Review,
  - Titled – **PG Examiner Reports – Report submitted successfully**
- When a report has been returned because it failed validation,
  - Titled – **PG Examiner Reports – Validation Failed**
- When a report has been reviewed and approved,
  - Titled - **PG Examiner Reports - Review Completed**
- When a report has been reviewed and returned.
  - Titled - **PG Examiner Reports - Review Completed**

# PG Report Approvers

## Review an application

When a report is **In Review**, you will be sent an email notification, similar to this:

A new PG Report has been submitted and is now awaiting review.

**School:** Law

**Report Type:** Nomination of Examiner

**Student Name:** Rebecca

**Student ID:** 12345678

You can access the report by opening the [PG Examiners Reports Site](#)

Click on the **blue hyperlink** within the email to open the site. Only Reports available for your school will be listed with buttons under the **Actions** column:

ID	Student ID	Student	School	Form Type	Status	Actions	Submitted By	Submitted Date	Actioned	QA Approver	Review Outcome
48	12345678	Rebecca	Law	Nomination of Examiner	In Review	<a href="#">View report</a> <a href="#">Approve</a> <a href="#">Return</a>	[Redacted]	2/25/2026 12:00...			
49	12345678	Rebecca	Law	Nomination of Examiner	In Review	<a href="#">View report</a> <a href="#">Approve</a> <a href="#">Return</a>	[Redacted]	2/25/2026 10:19...			

Double-click, or click **View Report** under **Actions**, to open a report to review it.

## Approve an application

When you want to approve a report, locate the item in the list and click the **green Approve** button.

A panel will open on the right side of the screen with a Comments box.

Input your comments if you have any and click **Approve**.

The report will change status to **Approved** and the submitter is notified.

## Return an application

When a report is not ready to be approved, locate the report in the list and click the **red Return** button.

A panel will open on the right side of the screen with a Comments box.

Input your comments and click **Return**. **Please note: you must leave a comment for the application to be processed properly.**

The report will change status to **Returned** and the submitter is notified.

# PG Report Admins - Registry

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## Managing Reports

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Navigate to the School Reports list. Admins are able to:

- View all applications from all schools within the list,
- Open any report,
  - Double-click, or click **View Report** under **Actions**, on a report to open it.
- Edit any application at any stage of the process, if necessary,
  - Double-click, or click **View Report** under **Actions**, on a report to open it,
  - Use the **Edit all** and **Save** buttons or click into any field to edit.
- Check line-item permissions at any stage of the process if necessary.
  - Right click on the item and click **Manage access**,
  - Select **Groups**,
  - Inspect the groups listed,
  - Only the Submitters and PGR-QA groups for the relevant school should have access along with SchoolReport-Admins (SchoolReport-Admin are members of Registry),
  - These groups should have access according to the table below:

Status	Submitters	PGR-QA
<b>Pending</b>	Can edit (Contribute)	Can view (Read Only)
<b>Validating</b>	Can edit (Contribute)	Can view (Read Only)
<b>Returned</b>	Can edit (Contribute)	Can view (Read Only)
<b>In Review</b>	Can view (Read Only)	Can view (Read Only)
<b>Approved</b>	Can edit (Contribute)	Can view (Read Only)
<b>Complete</b>	Can view (Read Only)	Can view (Read Only)

## Mark Reports as Actioned

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To ensure approved reports are marked as fully processed:

- Open a report that has been **Approved**,
- Locate the **Actioned** box under the header **Submission**,
- Either click into the field to open the **Yes checkbox** or click **Edit all**.
- Check the **Yes** box and either click away from the field to save or click **Save**.

# PG Report Site Owners

## Managing Users

There are various SharePoint permission groups across the site which allow access to the right reports for the relevant school.

They are:

Permission Level	Full Control	Edit	Contribute	Read
<b>Group Name</b>	MTD_PG Reports Owners  SchoolReports-Admins	<b><i>MTD_PG Reports Members (default permission group - not in use here)</i></b>	Submitters-BiologicalSciences Submitters -Business Submitters -DHP Submitters -Education Submitters -Engineering Submitters -Geosciences Submitters -Law Submitters -LLMVC Submitters -MMSN Submitters -NCS Submitters -Psychology Submitters -SocialSciences	PGR-QA-BiologicalSciences PGR-QA-Business PGR-QA-DHP PGR-QA-Education PGR-QA-Engineering PGR-QA-Geosciences PGR-QA-Law PGR-QA-LLMVC PGR-QA-MMSN PGR-QA-NCS PGR-QA-Psychology PGR-QA-SocialSciences
<b>Definitions</b>	Allows full control over the site, its contents and its design.	Enables users to add, edit, and delete lists; can view, add, update, and delete list items and documents.	Enables users to add or change items on the site pages or in lists and document libraries.	Enables users to view items on the site pages.
<b>Use in this system</b>	Allows the maintenance of users who can access and use the site  Allows the maintenance of applications within the School Reports list	N/A	Allow users to add reports  Allows user to edit reports	Allows users to view details within a report

To update the members in these groups please follow these instructions:

- Navigate to the SharePoint site,
- Click the **Settings cog** at the top right of the screen,
- Click **Site permissions**,
- To add someone to a group,
  - Click on the group name,
  - Click **New**,

- Enter their name – **must** be in the format of surname comma first name as it appears within the directory,
  - Alternatively, you can use their email address or UPN (s00aa0)
- Select their name when it appears,
- Click **Show Options**,
- Uncheck **Send an email notification**,
- Click **Share**.
- To remove someone from a group,
  - Click on the group name,
  - Select the user to remove by clicking into the small square box to the left of their name,
  - Click **Actions**,
  - Click **Remove Users from Group**,
  - Confirm on the panel that opens you have selected the correct person to remove and click **OK**.