

# LUCRIS GSM: The Researcher's manual

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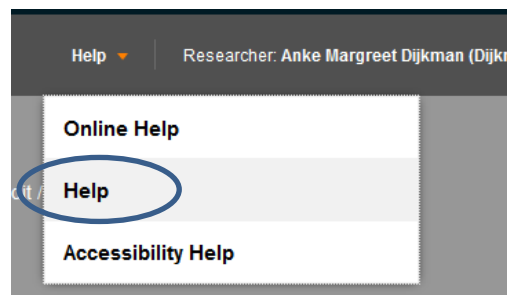
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## 1. LUCRIS GSM

Flow	PhD research
Application	The candidate who has found a supervisor for his/her PhD research gets into contact with the Graduate School Office and fills in an application form in LUCRIS GSM.
PhD admission	Starts with the student's application and ends with approval from the dean and the registration in SAP. The researcher role is not active in LUCRIS during this phase.
Supervision plans	Research and writing phase. Ends when the manuscript is finished.
Graduation formalities	Build up towards and organization of the defence. Ends with the registration of the result of the defence.

LUCRIS GSM is a workflow management system, where each involved person performs her / his actions at the right moment.

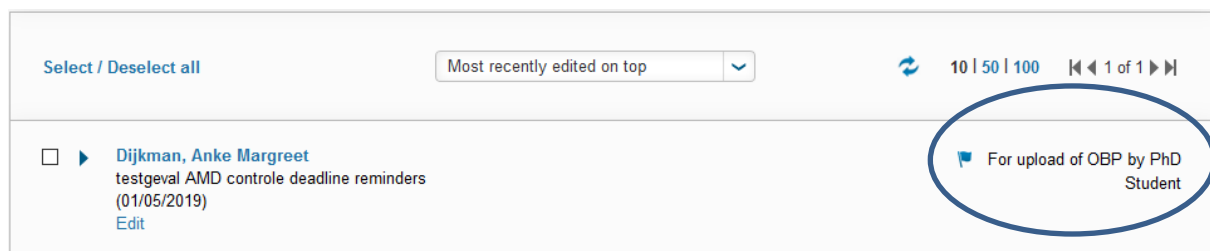
An overview of the statuses and roles (actors) can be found in "GSM: Workflow status overview" on the Help page of LUCRIS:



Or <https://lucris.leidenuniv.nl/converis/mypages/help>

When you are supposed to do something, you will be notified by an email and you will see a "thing to do" on your dashboard. When it is not your turn, you can view your dossier, but you cannot edit anything.

The status of your PhD research is always visible for you:

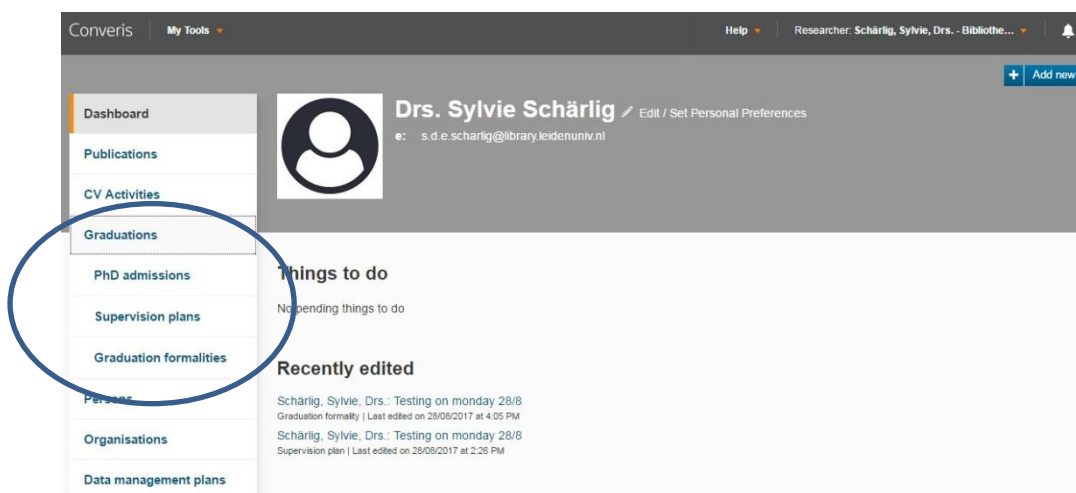


Please remind: you will only receive notifications after your first login into LUCRIS.

Do not login before your appointment is started and your work mail address is known in Converis.

## 2. How to get started

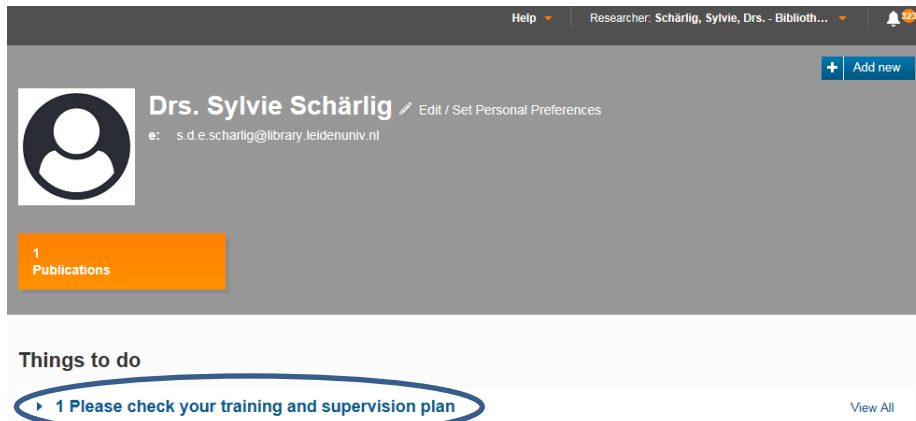
1. Log in with your ULCN account on: <https://lucris.leidenuniv.nl/converis/secure/client/login>
2. In the menu on the left side of your screen, click **Graduations** to view the three different flows of the PhD research. Here you can view your dossier in the selected flow.



### 3. Supervision plan

#### 3.1 Upload the OBP

1. If you are a PhD affiliated at Leiden University or if you have a scholarship, you have to draw up a training and supervision plan with your supervisors (OBP). This plan has to be uploaded in LUCRIS GSM within three months after the start date of your PhD research.
2. Use the 'Things to do' mentioned on your dashboard.



Help Researcher: Schärilig, Sylvie, Drs. - Bibliotheek... 323

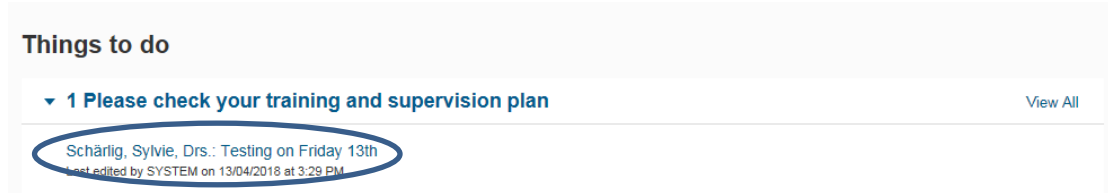
**Drs. Sylvie Schärilig** Edit / Set Personal Preferences  
e: s.d.e.scharlig@library.leidenuniv.nl

1 Publications

**Things to do**

▶ 1 Please check your training and supervision plan View All

Click on the message to see your research title.

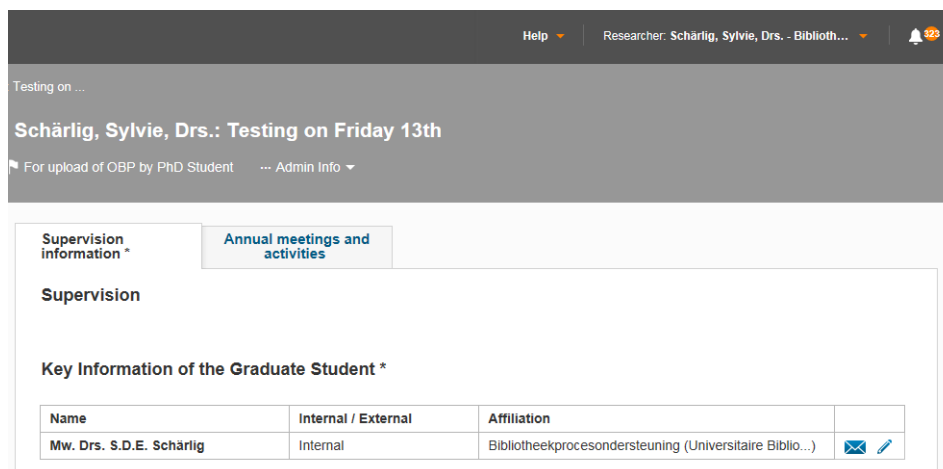


**Things to do**

▼ 1 Please check your training and supervision plan View All

Schärilig, Sylvie, Drs.: Testing on Friday 13th  
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Click on your **research title** to access your Supervision Plan.



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Testing on ...

**Schärilig, Sylvie, Drs.: Testing on Friday 13th**

For upload of OBP by PhD Student --- Admin Info

Supervision information \* Annual meetings and activities

**Supervision**

**Key Information of the Graduate Student \***

Name	Internal / External	Affiliation	
Mw. Drs. S.D.E. Schärilig	Internal	Bibliotheekprocesondersteuning (Universitaire Biblio...)	✉ ✎

3. Scroll down in the 'Supervision information' tab to 'Training and supervision plan (OBP)' and upload the OBP by clicking the folder icon

### Training and supervision plan (OBP)

Please make use of the form your faculty recommends and upload it here.

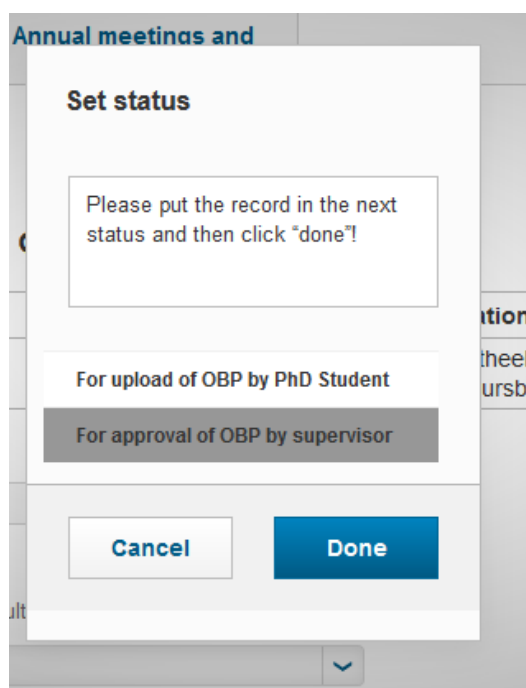


Approved by the supervisor

Yes  No

Comments on plan

4. When finished, click '**Save & Close**' and set the status to 'For approval of OBP by supervisor'. Click '**Done**' to exit



Your supervisor will be asked to approve your OBP. LUCRIS will inform you about the result via an automated email notification.

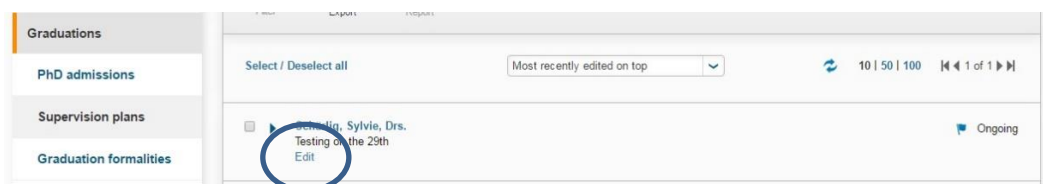
If your progress meetings lead to a substantial revision of the Training and supervision plan, you can upload one or more revised versions. There is an upload button on the same page, under the header **Additional training and supervision plans**.

### 3.2 Academic activities & transferable skills


LUCRIS GSM keeps track of your academic activities and transferable skills.

- The Transferable skills (courses) that are offered via the HRM portal (SAP SuccessFactors) will be automatically registered in LUCRIS. (But make sure you register as 'Staff' in the HRM portal, using your ulcn-account. Otherwise your course can't be linked to your dossier in LUCRIS.)
- All other transferable skills and academic activities need to be registered manually. Please note that a certificate is required for all activities that you register.


1. Log in, click '**Graduations**' in the menu on the left side and click 'Supervision plan'
2. Open your Supervision plan by clicking on 'Edit':



3. Click the tab 'Annual meetings and activities' and scroll down to '**Academic activities**'.

Add an activity by clicking on the white  icon:


**Academic activities**

Name	Organisation	Duration in hours	
Presentation at a conference		6	

 Add new activity

**Total hours of academic activities**  
The total number of hours will be recalculated when saving the page.  
6

**Transferable skills**

 Add new skill

**Total hours of transferable skills**  
The total number of hours will be recalculated when saving the page.  
0

4. You are now in the 'New Academic Activity' screen. Fill out the key information about the activity and click '**Done**'. The name, duration and certificate of the activity are mandatory. 1 ECTS is equal to 28 hours of work. Thus, for a 5 ECTS course you are expected to work/study 140 hours.
5. Click 'Save' at the bottom of the page to recalculate the total hours of academic activities:


Name	Organisation	Duration in hours	
Presentation at a conference		6	

 Add new activity

**Total hours of academic activities**  
The total number of hours will be recalculated when saving the page.  
6

**Transferable skills** activities are registered in a similar way.

### 3.3 Monitoring meetings

1. Each PhD student has an annual monitoring meeting with one or two independent members of the staff. The quality of the supervision is an important aspect of this meeting. You need to register the monitoring meeting in the same way as mentioned in 3.2.
2. Click the white  icon to add a new monitoring meeting

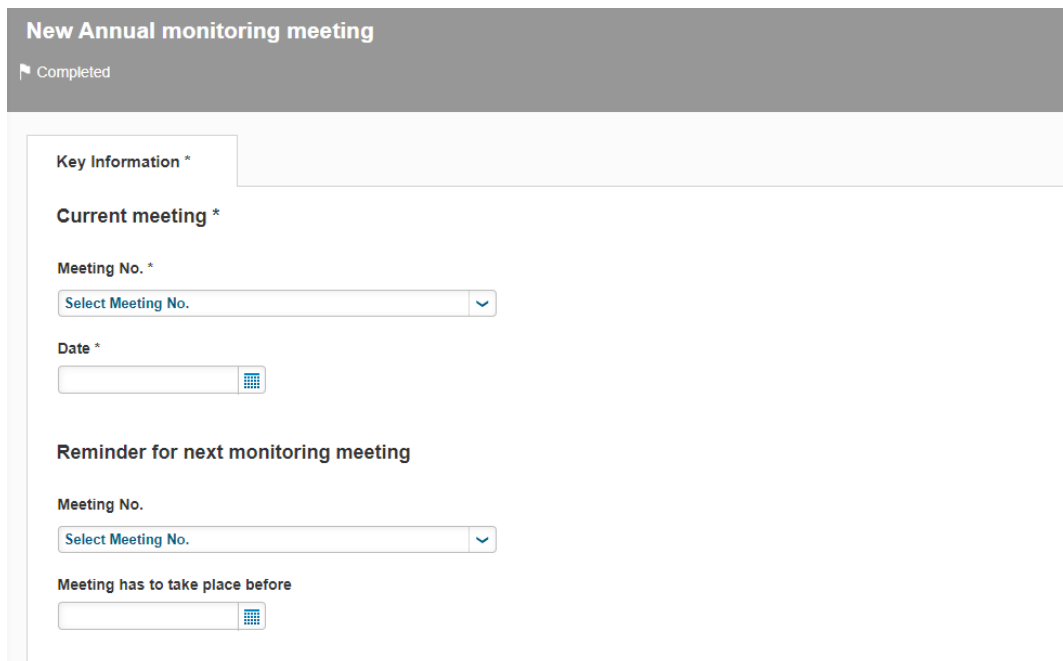
#### Annual monitoring meeting

Each PhD student has an annual monitoring meeting with one or two independent members of the staff. The quality of the supervision is an important aspect of this meeting.

First monitoring meeting has to be organised. Please set up a meeting before



3. You are now in the 'New Annual monitoring meeting' screen. Fill out the key information about the meeting. If you wish you can fill in the Reminder for the next monitoring meeting to get a notification that reminds you to plan the next meeting. To close the page, click **'Done'**.



**New Annual monitoring meeting**

Completed

**Key Information \***

**Current meeting \***

Meeting No. \*

Select Meeting No. ▾

Date \*

**Reminder for next monitoring meeting**

Meeting No.

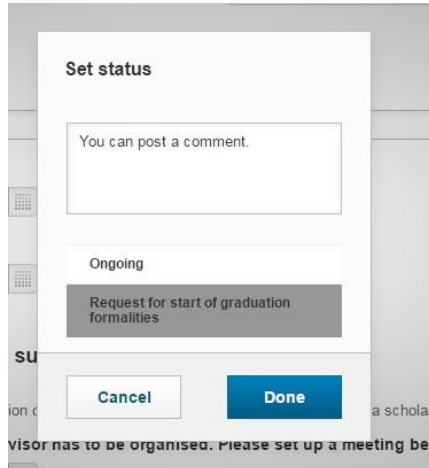
Select Meeting No. ▾

Meeting has to take place before

4. Click 'Save' to finish registering the meeting. Your Graduate School Office will see that the meeting has taken place.
5. **Note:** The 'annual meetings with supervisor' will be registered by the supervisor.

### 3.4 Request for start of graduation formalities

1. When you have finished your manuscript and you are ready to proceed to the Graduation formalities, you can switch the status of your supervision plan in LUCRIS GSM to 'Request for start of graduation formalities'. Open your Supervision plan, click **Save & Close** and change the status. **Note:** remember to check with your supervisor first!



The screenshot shows a 'Set status' dialog box. At the top, it says 'Set status'. Below that is a text input field with the placeholder text 'You can post a comment.'. Underneath the input field, there is a section for selecting a status. The current status is 'Ongoing', and the option 'Request for start of graduation formalities' is highlighted in grey. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Done'.

2. Your Graduate School Office will be notified and will check if you meet the requirements to start with the new phase. If so, you will be notified.



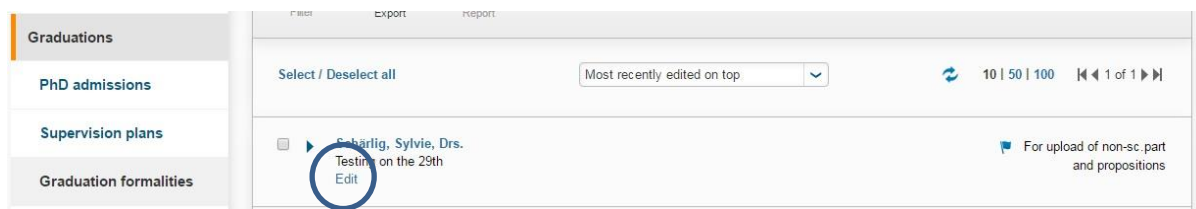
## 4. Graduation formalities

### 4.1 Hand in your manuscript

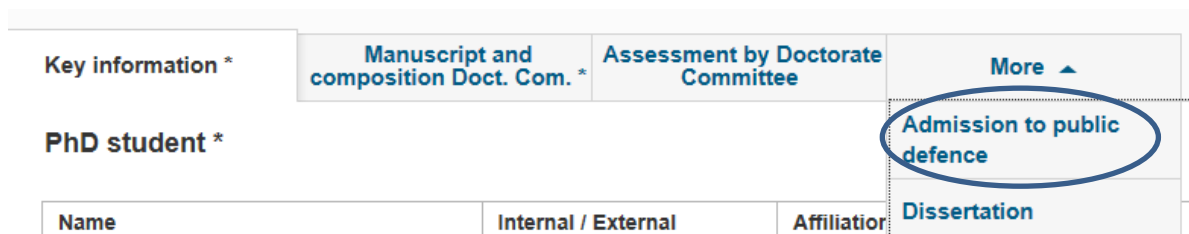
If you have finished your manuscript, give / send / mail it to your supervisor. You don't use the LUCRIS system for this.

### 4.2 Register to the Beadle

1. When the Dean has approved the dissertation through appendix C, you will be asked to fill out the Beadle's webform (appendix F). Go to **Graduations > Graduation formalities** in the menu on the left side of your screen and click 'Edit'



2. Click on the tab **More**, and then on **Admission to public defence**.



3. Scroll down to 'Beadle's webform' and click the link:

#### Beadle's webform

After you have received the Dean's admission letter (Appendix C), please fill in the Beadle's webform before contacting the Beadle.

The form can be found [here](#).

4. Fill out the application form and click 'Submit'

### 4.3 Upload of propositions and non-scientific part

1. When you need to upload the propositions and the non-scientific part of your dissertation, you will be notified via an email notification and the 'Things to do' on the dashboard.
2. Click on the message to see your research title and then click on your title to access the registration of your research

**Things to do**

▼ 1 Non-scientific parts and propositions to be uploaded or checked View All

Schärlig, Sylvie, Drs.: Testtitel  
Last edited by Sylvie Schärlig on 13/04/2018 at 4:45 PM

**Schärlig, Sylvie, Drs.: Testtitel**

For upload of non-sc. parts and propositions by PhD student Admin Info ▼

Key information \* Assessment by Doctorate Committee Admission to public defence More ▼

**PhD student \***

Name	Internal / External	Affiliation	
Mw. Drs. S.D.E. Schärlig	Internal	Bibliotheekproceesondersteuning (Universitaire Biblio...)	<a href="#">✉</a> <a href="#">✎</a>

3. Click on the tab 'More' and then 'Dissertation'

Key information \* Assessment by Doctorate Committee Admission to public defence More ▲

Admission to the public defence Dissertation

4. First fill in the final title of your dissertation.

Key information \* Manuscript and composition Doct. Com. \* Assessment by Doctorate Committee Dissertation ▼

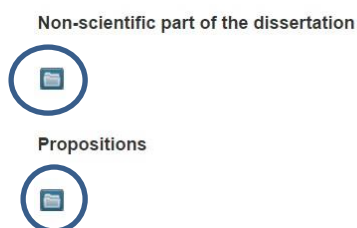
**Final title of the dissertation**

Please register the final title of your dissertation.

**Final title**

Test project title

5. Scroll down to 'Non-scientific part of the dissertation' and 'Propositions' and click the folder icon to upload your documents



Note: The non-scientific parts of the dissertation consist of:

- title page (front and reverse)
- foreword and/or afterword
- acknowledgment(s)
- (possible) assignment
- (possible) quotation/motto
- table of contents
- curriculum vitae
- summary
- front and back cover of the dissertation volume (both front and reverse)

Your propositions also belong to the non-scientific part of the dissertation, but have a separate upload button because there is a difference in the procedure of approval.

Converis allows you to upload a maximum of 5 documents at once. If you want to upload more files, click '**Save**' and upload the next documents. If you want to upload some documents later, click '**Save & Close**' and leave the status unchanged.

6. When you have uploaded all necessary documents, click '**Save & Close**' and select the status 'Non-sc. parts and propositions to be checked by GSO'

#### 4.4 Upload Dissertation and license agreement

After the propositions, the non-scientific part and the title page have been approved, you are allowed to publish your dissertation. You will be notified via an email notification and a 'Thing to do' on the dashboard of LUCRIS GSM.

Besides the printed copies, a digital version of your dissertation has also to be provided. The digital version will be included in the Institutional Repository of Leiden University. To start this process, please go to the [Library website](#) to submit your dissertation and print Appendix B.

Once filled in and signed, please send Appendix B (Licence Agreement), together with the printed copies of your dissertation, to the Library:

University Libraries Leiden - MDA  
Van Steenis Building  
Einsteinweg 2, 2333 CC Leiden

For details, see Library website.