

Eforms: Road to Doctoral Success

Electronic Doctoral Student Progress Tracking System

Guidebook

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Introduction

Welcome to the Graduate College [Eforms system](#) for tracking the academic progress of doctoral students at Drexel University. The purposes of the system are to reduce the usage of paper, gather the key information on our doctoral programs across the university, and monitor how students are performing by recording all key milestones for each student on the road to achieving a doctoral degree. This information is used at the individual level by registered graduate students and faculty supervisors, so they know the next steps and at the organizational level by departments, colleges, and the University for accreditation purposes and continual improvement.

This system was launched in the Fall Term of Academic Year 2020 and included professional doctorate degree candidates in the Fall Term of Academic Year 2022. Feedback and questions are highly encouraged as we seek to fix issues that arise, clarify the directions, and make the process as seamless as possible for everyone involved. This guide provides a step-by-step overview and should answer most questions. There is a Frequently Asked Questions section at the end and further help can be obtained by sending queries to eforms@drexel.edu.

There are 11 to 13 tabs in the Electronic Doctoral Student Progress Tracking System (set-up, select student, core information, supervisor information, plan of study, candidacy committee, candidacy examination, annual reviews, advisory committee, dissertation/Project proposal, graduation requirements, dissertation/project oral defense, submit thesis and supporting documents). Depending on your program, the candidacy examination and proposal defense are combined as one step; hence, this explains why some people will only see 11 tabs (candidacy committee and candidacy exam will disappear). Each tab has a unique function and requires approval for certain constituents. Under each tab, you will find one or more navy blue **Information** boxes with a summary of instructions on how to use the tab and proceed. Much of those instructions can also be found here. The tabs that pertain to the progress of the doctoral student are in the sequential order of how doctoral programs are

structured starting with **Supervisor Appointment**, then **Plan of Study**, ... (and so on) through to **Submit Thesis**. Note that some tabs are locked (unavailable) until the prior necessary steps have been completed and all approvals received.

We would like to thank Anya Kurennaya, Chenxi Li, Guillermo Ibarrola Recalde, Cheng Wang, Shuting Zhang, the Department of Physics, Department of Management, and the Department of Electrical and Computer Engineering for extensive help testing the system. We would also like to thank the School of Education, Department of Management, and Department of Communications, Culture, & Media for being part of the initial pilot. In addition, the eforms committee would like to give a special thanks to Darin Dunston, Perrie Prince, Kelly Walsh, Natalya Potsurko, Mario Stavrev, Deanna Hill, Skylar Gonzalez, Ariel Varghese and Erin Durkin for developing the e-forms system for our professional doctorate students. This would not have been possible without their ongoing effort with this project.

Last Date Modified: 03/2023

Definitions

Student: Refers to a PhD or professional doctoral Student. Only 'registered' students will appear active in the system. Students who have graduated or become inactive will not appear in the system but their information has been stored for retrieval.

Tab: Each tab represents a milestone in the doctoral program. Other tabs like **Setup** are designed to manage other miscellaneous functions like assign admin roles, delete comments, email templates, etc.

Director of Graduate Studies (DGS): This individual serves as the faculty coordinator of graduate studies within an academic unit. DGS shares the responsibility for guiding and improving graduate education within the program.

Program Manager: A staff member often referred to as an academic or professional graduate advisor within an academic program. This person oversees and manages the administrative and daily operations of a university program, ensuring compliance with university policies and regulations.

Supervisor: is often regarded as a faculty adviser or supervising professor, who provides academic advising and support to advisees within the student's academic discipline.

Committee Chair: The chair is selected based on content expertise. The chair is responsible for guiding the candidate to produce doctoral level, original scholarship in the proposed topic. The chair must be a member of the student's academic discipline. The chair must be a Drexel University tenured or tenure-track faculty, although non-tenure track and Non-Drexel persons may serve as co-chairs.

Non-Drexel Person: Committee members outside of Drexel are referred to as "Non-Drexel Person" or external members. External members may be from outside of Drexel University, but must be approved in accordance with the procedures and program guidelines. The system holds a database of

previously entered Non-Drexel persons who can be found by searching on their professional e-mail address. If a Non-Drexel person is not in the database, they can be added by selecting **Manage Non-Drexel People** under [Set Up](#).

Approval: Each milestone requires the student, the faculty advisor and/or other constituents to confirm, review and approve various steps in the process of completing the program. Approvals are effectively the signatures and will reflect each person's *abc123* Drexel ID and the date & time approval was conferred.

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Select Student

WHO: This screen is the starting tab for all faculty and program managers. Doctoral students will not see this screen.

PURPOSE: In order to make changes, updates, or enter any information, the user must first select or search for the doctoral student and then click the **Confirm** button. Until a student is selected, most tabs will not be available because each contains student specific information.

WHEN: Whenever using the system to update, change, enter information pertaining to a particular doctoral student.

HOW: Please choose from the list below from all students that have been assigned to you or use the search function to find a student. Students for which you have an assigned role should appear in the list at the bottom of the tab. *For students already assigned to you*, you may search by typing in a First or Last Name in the boxes below or simply selecting (highlighting) them from the list.

Alternatively, you may use the search function by *first* clicking the Search button. You can search for the student using their First Name, Last Name, the Banner ID# (8-digits) or the *abc123* username. Once a student has been chosen, their name will appear under Student Name.

Once you have made your selection, click **Confirm** on the right to continue. Clicking the **Confirm** button will take you to the [Core Information](#) tab.

If you do not find a student assigned to you on your list or an assignment needs to be changed, please contact your Program Manager or Director of Graduate Studies in your Department to have it corrected.

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Drexel UNIVERSITY GRADUATE COLLEGE - ROAD TO PHD

Setup → **Select Student** → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → Candidacy Exam → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

CAS Logout

Select Student

Information

Student Search Confirm

Your Current Student List

Show 10 entries

Student Id	First Name	Last Name	Your Roles
	Amanda	Acevedo	
	Carissa	Anthony	
	Jonghyuk	Bae	
	Cameron	Bale	

**Search by clicking here
OR
Enter First or Last Name Here
OR
Select student from list below**

Then Confirm your choice here.

Core Information

WHO: Everyone/Program Managers.

PURPOSE: To summarize the key information related to a doctoral student's academic progress in the doctoral degree program.

WHEN: All doctoral students will start here upon logging in and view their own information. All faculty and professional staff will be brought here after selecting and confirming which student on the **Select Student** Tab.

HOW: Information available in Banner will be automatically pulled. If any information is listed incorrectly, please ask your staff administrator for the doctoral degree program to contact ais_student@drexel.edu.

The only actions to be taken on this tab are by the Program Manager to either assign faculty, staff to a new student or change the assignments for a current student.

New doctoral students who have just started will not have information on their faculty advisor, program manager, or Director of Graduate Studies. These need to be assigned by the program manager by clicking the **Select Faculty** button at the top under the **Set Tab**. For all newly entering doctoral students, please choose the appropriate people (more than 1 may be chosen for any role) from the drop-down list by the end of the 1st week of classes of the first term the student is in the program. All doctoral students must have at least one professional staff member (program manager) and one faculty member assigned to them. Completion of that information will open [Supervisor Appointment](#).

If there are changes to the people serving as the program manager or DGS roles for a particular student, the Program Manager may use the **Select Faculty** button to make changes. If such a change would affect many students, please see **Batch Update Faculty** in **Administrative Functions** under [Setup](#).

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- Setup
- Select Student
- Core Information**
- Supervisor Appointment
- Plan of Study
- Candidacy Committee
- Candidacy Exam
- Annual Reviews
- Dissertation Committee
- Proposal Defense
- Graduation Requirements
- Dissertation Defense
- Submit Thesis
- Supporting Documents

Core information

Information

Select Faculty

Student Id	First Name	Last Name	Email
[Redacted]	Yuyun	Zhong	[Redacted]
PhD/Doctoral Degree			
College	Major	Minor	
Bennett S. LeBow Coll. of Bus.	Business Administration		
Department	Start Date	Banner Administrator/Advisor	
Decision Sciences	2015-09-21		
Administrator/Advisor	Director of Graduate Studies	Faculty Coordinator	
Sarah Haley	Christopher Laincz	Jade Lo	
Alison Geigert			
Supervisor	Co-Supervisor		
Christopher Laincz			

Use the Select Faculty Button to make changes to these appointments. That function is not available to students.

Supervisor Appointment

WHO: The Doctoral Student, Supervising Professor.

PURPOSE: To designate a faculty supervisor(s) for a doctoral student.

WHEN: As soon as possible but no later than the end of the first or second year in the doctoral Program.

HOW: Once a student has secured a faculty member willing to serve as a supervising professor, this information is completed. This information can be completed at any time during the doctoral student's first year in the program including students admitted in quarters other than Fall term. For students first starting in the Fall term, this information is due by the last day of classes of Spring Quarter.

Any tenured or tenure-track faculty member may serve as a supervisor. Non-tenured and non-tenure-track Drexel faculty may not serve as sole supervisor but may serve as co-supervisor along with a tenured/tenure-track Drexel faculty member as supervisor. In addition, non-Drexel individuals may not serve as sole supervisor, but may serve as co-supervisor along with a tenured/tenure-track Drexel faculty member as supervisor. Requests for research or teaching faculty to take on co-supervisor roles must be approved by the Director of Graduate Studies as with all appointments.

The upper gray boxes show the current appointments. To assign a supervisor or co-supervisor, use the white boxes to search and select *Supervisor* or *Co-supervisor* from the drop down boxes to the right, then click **Appoint**. You can also select the three dots under Drexel Person ID to search for a faculty member. Upon clicking on the **Appoint** button an email will be sent to the appointed supervising professor. The appointed individual will be asked to confirm their appointment/participation via email.

A supervisor who has received the appointment e-mail should login and go to this tab. Find your name at the bottom of the tab and click the **Confirm** box to accept the appointment. If you do not wish to accept the appointment, please inform the student and the relevant DGS of your decision by e-mail.

Once all supervisors and co-supervisors have confirmed, please click **Request Approvals** at the bottom of tab. The supervisor appointment requires approvals from the doctoral student and the Director of Graduate Studies (DGS). Completion of this step will open the next step: [Plan of Study](#).

If a Non-Drexel person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab and enter the required information. Please note that Non-Drexel supervisors will not have access to this database to protect everyone's personal information. They will still be able to have their decisions and comments recorded. Please see, for example, **Dissertation/Project [Proposal Defense](#)**, for further information.

The table at the bottom of the tab shows the current Supervisor(s) and the history of supervisors with the date started and the date ended. Note that a doctoral student may have no more than 2 (co-)supervisors at any one time.

If a supervisor or co-supervisor needs to be changed or another one added, first please click the **Update** button at the top of the tab. Next, please click the **Remove** button at the bottom next to the Supervisor's name. Note that the removed Supervisor will receive an e-mail notification of the removal. Search and find the new Supervisor or Co-Supervisor in the search boxes above. Upon clicking **Appoint**, the new (Co-)Supervisors will be notified.

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Setup → Select Student → Core Information → **Supervisor Appointment** → Plan of Study → Candidacy Committee → Candidacy Exam → Annual Reviews → Dissertation Committee → Proposal Defense → Graduation Requirements → Dissertation Defense → Submit Thesis → Supporting Documents

Supervisor Appointment

Information

Student Id: [Redacted] First Name: Yuyun Last Name: Zhong Email: [Redacted]

Current Supervisor(s). *Use Appoint Supervisor search boxes below to appoint a new Supervisor or Co-Supervisor.*

Supervisor Id: cal38 Full Name: Christopher Laincz

Co-supervisor Id: Full Name:

Select & Appoint Supervisor(s):

Drexel Person Id: PersonId: [Dropdown] Full Name: [Text] Role: Supervisor [Dropdown] [Appoint]

Non Drexel Person

Email Address: [Text] Full Name: [Text] Role: Co-supervisor [Dropdown] [Appoint]

Supervisors

Full Name	Role	Remove	Confirmed	Date Confirmed	Date From	Date To	Email	Institution	Department	Academic Title	Job Title
Christopher Laincz	Supervisor	Remove	<input checked="" type="checkbox"/>	Sep 25, 2020 9:32:17 AM	09/25/2020	current	cal38@drexel.edu	Drexel	Economics	Associate Professor	Associate Professor, PHD Program

Current Supervisors will appear here.

Use the Search Function here to appoint a new Supervisor or Co-Supervisor

The history of Supervisors will appear here. To remove a supervisor please click here.

Plan of Study

WHO: The Doctoral Student.

PURPOSE: To establish an initial plan of study and the parameters for pursuing a doctoral degree.

WHEN: The information should only be completed after the doctoral student and supervisor have discussed and agreed upon the student's plan of study. This information should be completed during the doctoral student's first year in the program including students admitted in quarters other than Fall. For students first starting in the Fall term, this information is due by the last day of classes of the Spring Quarter.

HOW: The doctoral Student should enter most or all of the information, though the Supervisor may also enter and/or contribute.

Following a conversation between the doctoral student and Supervisor on the plan of study leading to the Candidacy exam, please indicate the approximate expected month and year for both the candidacy exam and dissertation defense.

Next, some doctoral programs may combine both the Candidacy Examination and Dissertation/Project Proposal into one milestone. If "No" is selected for this question "Does your program require a Candidacy Examination," the tabs for Candidacy Committee and Candidacy Examination will not appear in the eforms system. If "Yes" is chosen for this question, the student must complete all the appropriate steps including the required signatures to access the other milestones in the eforms system.

Please answer whether any graduate credits or a transfer of candidacy from another institution took place by selecting **yes or no**. Please note that any credit transfer arrangements from another institution or program **must** have been agreed upon at the time of admittance to the doctoral program. If the answer is "Yes," please also indicate how many graduate level credits are being applied towards the doctoral degree and whether candidacy status is also being transferred. Supporting evidence of a

passed candidacy exam at another institution is required. Please upload that information using the [Supporting Documents](#) tab. This information will be reviewed by the Graduate College and will require their approval as well.

There is a text box for entering notes or the detailed Plan of Study. Please click **Save** when finished typing into the text box to store the information. In addition, or alternatively, the Plan of Study as a document (e.g. .doc or .pdf) can be uploaded. Please use the [Supporting Documents](#) tab to do so and select Plan of Study from the drop down menu under **Document Type**. Please note that entering/uploading the Plan of Study is optional. Once the information is complete, please select **Request Approvals** at the bottom of the page to obtain approvals. Completion of this step will open the next step: [Candidacy Committee](#).

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Plan Of Study

Information

Student ID: [Redacted] First Name: Giuseppe Last Name: Salomone [Redacted]

* Did you have conversation about your Drexel Plan Of Study with your supervisor?

Yes

Note: Some PhD/Professional Doctorate programs are lockstep and specific courses and course sequences will be defined upon admission. Students may use this page to document any individual adjustment, if necessary.

* Does your program require a Candidacy Exam?

[Empty dropdown]

* Expected Date of Drexel Candidacy Exam

03/2019

* Expected Date of Dissertation/Final Project Defense

10/2023

Please note that any credit transfer arrangements and/or candidacy status from another institution or program must have been agreed upon at the time of admittance to the doctoral program if applicable. Please see the [Provost Policy on transferring graduate credits](#). Please upload the documentation under Supporting documents under Transcripts and/or Candidacy Transfer Evidence. Graduate College approval will also be required.

* Did you transfer credits and/or candidacy status from another post-masters-level program to the Doctoral Program?

Yes

Information

* How many credits?

15

* Are you transferring candidacy Status?

No

Candidacy Committee

WHO: Supervisor.

PURPOSE: To record the membership, including the Chair, of the Candidacy examination committee.

WHEN: Prior to the candidacy exam. The Candidacy exam must take place by the end of the 2nd year in the program. If the candidacy was transferred in at the time of admission, please transcribe the information here.

HOW: The doctoral student's supervisor is responsible for entering the candidacy exam committee chair for their doctoral student.

The student's supervisor (or if not available, the appropriate Director of Graduate Studies or program manager) should assign the appropriate faculty member to the candidacy committee chair role by using the **search box** below. The Candidacy Committee Chair must be a Drexel faculty member. Once the chair has been assigned, the chair, the supervisor, College DGS, or the program manager should complete the assignment of the remaining Candidacy Exam Committee members.

Upon clicking **Add** for each member, they will be sent an e-mail asking them to login and confirm their appointment. Confirmation is done by checking the square next to each committee member's name in the list. Once all committee members have confirmed, the Chair or Supervisor should **Request Approvals** for the Candidacy Exam Committee. Completion of this step will open the next step: [Candidacy Exam](#).

Note that if a Non-Drexel person will be on the Dissertation committee, please search for them in the appropriate box using their professional e-mail address. If that person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab. Follow the directions there to add them to the database. Please note that Non-Drexel members will not have access to this database to protect everyone's personal information.

If the committee needs to be changed after approval or a second candidacy exam is being administered, please select the **Update** button at the top. A committee member can be removed by clicking the **Remove** button next to their name in the table near the bottom of the page.

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The screenshot shows the 'Candidacy Committee' management page. At the top, a navigation menu includes 'Setup', 'Select Student', 'Core Information', 'Supervisor Appointment', 'Plan of Study', 'Candidacy Committee' (highlighted with a red box), 'Candidacy Exam', 'Annual Reviews', 'Dissertation Committee', 'Proposal Defense', 'Graduation Requirements', 'Dissertation Defense', 'Submit Thesis', and 'Supporting Documents'. Below the navigation, there are 'Information' and 'Update' buttons. The 'Update' button is highlighted with a red arrow pointing to it from the text 'Use the Search Function here to appoint Committee Members.' and another red arrow pointing to it from the text 'To remove a member, first select Update. Then removal buttons will appear next to the committee members names.' The form includes fields for 'Student Id', 'First Name' (Yuyun), 'Last Name' (Zhong), and 'Email'. Below these are search boxes for 'Drexel Person Id' and 'Non Drexel Person' with 'Full Name' and 'Role' dropdowns and 'Add' buttons. A table titled 'Candidacy Committee' lists members with columns for Full Name, Role, Confirmed, Date Confirmed, Date From, Date To, Email, Institution, Department, Academic Title, and Job Title. The table contains six entries, with the first entry (Christopher Laincz) having a checked 'Confirmed' box. At the bottom, there are 'Request Approvals' and 'Approvals' sections.

Use the Search Function here to appoint Committee Members.

Current and prior committee members will appear here.

To remove a member, first select Update. Then removal buttons will appear next to the committee members names.

Full Name	Role	Confirmed	Date Confirmed	Date From	Date To	Email	Institution	Department	Academic Title	Job Title
Christopher Laincz	Chair	<input checked="" type="checkbox"/>	Sep 26, 2020 10:21:20 AM	09/26/2020	current	cal38@drexel.edu	Drexel	Economics	Associate Professor	Associate Professor, PHD I
Kapil Dandekar	Member	<input type="checkbox"/>		09/26/2020	current	krd26@drexel.edu	Drexel	Electrical & Computer Engineering	Professor	Research Compensation
Aroulis Foster	Member	<input type="checkbox"/>		09/26/2020	current	anf37@drexel.edu	Drexel	School of Education	Associate Professor	Assoc Dean Acad Aff Grad
Michelle Dolinski	Member	<input type="checkbox"/>		09/26/2020	current	mjd396@drexel.edu	Drexel	Physics	Associate Professor	Associate Dean, Research
Jade Lo	Co-Chair	<input type="checkbox"/>		09/26/2020	current	y1663@drexel.edu	Drexel	Management	Associate Professor	PHD Program Director
Wenjing Shen	Co-Chair	<input type="checkbox"/>		09/26/2020	09/26/2020	ws84@drexel.edu	Drexel	Decision Sciences	Associate Professor	Associate Professor

Candidacy Examination Results

WHO: Candidacy Committee Chair, Candidacy Committee Members

PURPOSE: To record the outcome of a Candidacy Exam.

WHEN: The day, time and location should be entered prior to the candidacy exam. (*Note many departments have various stages of the candidacy exam, for example a written portion and a presentation. In those cases, it is recommended that the date/time/location of the last portion of the candidacy exam be entered*). The results and committee member's agree/disagree votes should also be entered immediately following the completion of a candidacy exam. Note that the Candidacy exam must take place by the end of the 2nd year or 3rd year in the program. If Candidacy was transferred at the time of admission, please see the [Plan of Study](#) tab.

HOW: Prior to the exam, the committee chair should enter the exam date, time, location of the candidacy exam and click the **Save Exam Info** button. OPTIONAL: The committee chair may also select **Save & Send Exam Notification**, which will send notifications to the doctoral student and the entire committee of the date, time, and location.

Upon completion of the exam, the committee chair should enter the decision by the committee with regards to the student's performance on the exam. The chair may also enter a summary recommendation in the text box below. Please select **Save Summary** if using the text box. Additional information or feedback for the student may be uploaded under the [Supporting Documents](#) tab.

There are four choices for the outcome of the exam: 1) Recommend; 2) Recommend with Provisions; 3) Do Not Recommend; and 4) Do Not Recommend with Dismissal. Choices 1 and 2 are taken as a **Pass** and the doctoral student moves on to become a doctoral candidate (PHDC or PDCA). Recommend with Provisions indicate that the pass is conditional, and some additional work or conditions will need to be met in the near future. It is recommended that success or failure in satisfying any provisions be addressed in the first [Annual Review](#) following the candidacy exam. For a student

recommended for candidacy with or without provisions, please indicate whether the doctoral Candidate is a post-baccalaureate or post-masters student using the check boxes.

Choices 3 and 4 both indicate failure of the Candidacy exam. Do Not Recommend indicates a failure of the exam but the student may be granted a second attempt at the discretion of the faculty. Do Not Recommend with Dismissal indicates a failure of the exam and the recommendation of the faculty that the doctoral student be dismissed from the program. If another attempt at the candidacy exam is granted, after the current decision is submitted and approved, to initiate a new attempt, please return to [Candidacy Committee](#) tab and select **UPDATE** to form a new committee.

If the student is recommended with provisions or not recommended for candidacy or recommend for dismissal, the chair should enter comments in the text box or upload all supplemental materials in the [Supporting Documents](#) tab.

Upon entering all the information, the Committee Chair should select **Save Decision & Send Notification**. Each committee member, including the chair, will then receive a notification asking whether they agree or dissent from the decision.

Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting Documents](#) tab and select Candidacy Exam and then upload the comments. Note that these comments will be available to the student. A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Candidacy Committee, the

Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have entered their agreement or disagreement, the Committee Chair should click **Request Approvals**. The Committee Chair and the Director of Graduate Studies must then approve. Upon doing so the form goes to the Graduate College for final approval. Completion of this step will open [Annual Review of Doctoral Candidates](#) and the [Dissertation Committee](#) tabs.

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Drexel UNIVERSITY GRADUATE COLLEGE - ROAD TO DOCTORAL DEGREE

Setup ▾ Select Student → Core Information → Supervisor Appointment → Plan of Study → Candidacy Committee → Candidacy Exam → Annual Reviews → Advisory Committee → Diss/Project Proposal → Graduation Requirements → Diss/Project Oral Defense → Submit Diss/Project

Supporting Documents Task List Grad College Task List

Candidacy Examination

Information

Student Id [REDACTED] First Name [Giuseppe] Last Name [Salomone] Email [REDACTED]

Please consult with each of your committee members first before entering this information

Students should note that passing this exam only confers "candidacy" status to Drexel internally, for student progress tracking purposes. Outside of Drexel, each academic field has its own criteria for what constitutes doctoral candidacy (e.g., passing the PhD dissertation proposal). Students should seek guidance from their program and mentors for the correct timing of the use of this term and request explicit permission to refer to themselves as Doctoral Candidates in any representation or communication outside of Drexel.

* Exam Date [03/18/2019] * Time [1:00 pm]

Building [3201 Arch St.] * Location [340]

* Virtual Location (at least one location must be entered)

[Save Exam Info] [Save & Send Exam Notification]

Summary recommendation / Suggested course of action on student part

[Save Summary]

* Outcome / Candidacy Recommendation Information

Recommend Recommend with Provisions Do Not Recommend Do Not Recommend with Dismissal

[Save Decision & Send Notification]

Please upload all supporting documents in the Supporting Documents tab

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this

Information

Annual Review Results

WHO: Supervisor, Dissertation Committee Members

PURPOSE: To formally monitor the progress of each Doctoral Candidate towards degree completion.

WHEN: Each doctoral candidate shall undergo an annual review due each year on July 15th.

HOW: All doctoral students that have reached candidacy status shall be reviewed annually. The report should be filed by the end of the Spring quarter every year until the student graduates and no later than July 15th.

To enter an annual review click **New Review**. The Supervisor should enter the date of the annual review and the result (Satisfactory/Unsatisfactory) and any comments in the text box. Please also indicate if the student is expected to graduate within the next academic year. Once that information has been entered, click **SAVE**. The annual review should appear in the table.

If the review is **UNSATISFACTORY**, please enter the recommendation of either immediate dismissal or with redeeming qualities and an additional review to occur in six months. Any unsatisfactory decisions must also include documentation, such as a letter to the student, specifying the reason for the decision and, if appropriate, the remedial actions required to achieve a satisfactory result in the future.

Next, industry internships for doctoral students are an invaluable opportunity to build non-academic skills. In fact, some faculty advisers will encourage students to acquire this practical work experience outside of Drexel. If a doctoral student is schedule to do an internship, please check off the “Internship” and provide the location of this placement. For example, you may want to provide the name of employer, city and state.

Previously completed reviews can be found in the table below. By clicking on an existing annual review in the table, the list of dissertation committee members will appear below. Each member may add comments here on the doctoral candidate’s progress. These comments may be entered in the text box by their names and/or written comments may be uploaded in the Supporting Documents tab.

Once the review results and comments from the committee members have been entered, please **Request Approvals**. For the needed approvals from the student, supervisor and DGS, select the appropriate annual review from the table and then approve.

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Annual Reviews

Information

Student ID: [REDACTED] First Name: Giuseppe Last Name: Salomone Email: [REDACTED]

[New Review](#) Click here to start new Annual review or select from the list below to review or approve.

Please upload all supporting documents (including scanned) in the Supporting Documents tab
 There are 0 supporting documents associated with the Annual Reviews for this students located in the Supporting Documents tab.

Year In Program: [REDACTED] * Annual Review Date: 06/09/2022 Annual Reviews are due by July 15th

Check here if student will be graduating next academic year

*The student has been informed that his/her progress is considered to be:

Satisfactory Unsatisfactory

Check here if student currently is taking an internship

Internship Internship location:

Comments may be entered below or uploaded on the Supporting Documents tab.

Comments

> Created on Jun 9, 2022 3:54:12 PM by Wesley Shumar

[Save](#)

Click on the table row below to see each Annual Review details

Year in Program	Review Date	Satisfactory	Continue
[REDACTED]	06/09/2022	Y	

Showing 1 to 1 of 1 entries

Advisory Committee

Full Name	Role	Notes	Email	Institution	Department
Wesley Shumar	Chair	Comments	shumarw@drexel.edu	Drexel	Communication
Albert Tedesco	Member	Comments	ast33@drexel.edu	Drexel	

Advisory Committee

WHO: Doctoral Student

PURPOSE: To appoint the Dissertation Committee Chair and Committee Members.

WHEN: After the candidacy exam has been passed. It is recommended that the committee be designated within six months of completion of the candidacy exam. If that is not possible, it is strongly recommended that, at a minimum, the Dissertation Committee Chair be entered within six months from the candidacy exam.

HOW: The Dissertation Committee must consist of at least five members for doctoral students, at least three of whom must be currently tenured or tenure-track Drexel faculty members. At least two of the committee members must be from outside of student's primary specialization area. At least one of the committee members must be from outside of student's department, preferably from outside the university. Full-time, non-tenure track research faculty are also eligible to serve on the Dissertation Committee, including as Co-Supervisor. Non-Drexel individuals may serve on the committee or as a co-supervisor with a Drexel faculty member as supervisor. Please note that each College is permitted to set additional rules and doctoral students should refer to their College's documentation for further information. For professional doctoral students, please consult with your academic department.

Note that if a Non-Drexel person will be on the Dissertation committee, please search for them in the appropriate box using their professional e-mail address. If that person does not exist in the current database, please select **Manage Non-Drexel People** under the [Setup](#) Tab. Follow the directions there to add them to the database. Please note that Non-Drexel members will not have access to this database to protect everyone's personal information.

The doctoral student should enter the name of each committee member using the search functions. Upon clicking **ADD** for each member, they will be sent an e-mail asking them to login and confirm their appointment. **Committee members** should select confirm in the left column by their

name to indicate their agreement to serve on the committee. Once all committee members have confirmed, the Chair or Supervisor should **Submit** the Dissertation Committee for approval. Completion of this step will open [Proposal Defense](#).

If the committee needs to be changed after approval, please select the **Update** button at the top. If this committee is being Updated for a *second* attempt at the Proposal Defense or Dissertation Defense, please note that all committee members need to be removed and added again even if someone served on both committees. If the committee is completely identical, you may use the **COPY** button.

Last Date Modified: 03/23

The screenshot shows the 'Dissertation Advisory Committee Appointment' page. The navigation bar at the top includes 'Dissertation Committee' which is highlighted with a red box. The page has an 'Update' button at the top left. Below this are input fields for 'Student Id', 'First Name' (Yyun), 'Last Name' (Zhong), and 'Email'. A 'Copy' button is also present. Below these are search boxes for 'Drexel Person Id' and 'Non Drexel Person' with 'Add' buttons. The main section is a table titled 'Dissertation Committee' with columns: Full Name, Role, Confirmed, Date Confirmed, Date From, Date To, Email, Institution, Department, Academic Title, and Job Title. The table lists five members: Christopher Laincz (Chair, Confirmed), Kapil Dandekar (Member), Jade Lo (Co-Chair), Michelle Dolinski (Member), and Aroutis Foster (Member). At the bottom, there are 'Request Approvals' and 'Approvals' sections for Student, Supervisor, and DGS.

Use the search function to appoint Committee members. (Arrow points to the search boxes)

Current and prior Committee members will appear here. (Arrow points to the table)

To remove a member, first select Update. Then removal buttons will appear next to the Committee member names. (Arrow points to the 'Update' button)

Dissertation/Project Proposal Defense

WHO: Doctoral Student, Dissertation Committee Chair

PURPOSE: To schedule and record the outcome of the Dissertation/Project Proposal Defense.

WHEN: The day, time and location should be entered prior to the proposal defense. The results and committee members' agree/disagree votes should also be entered immediately following the completion of a Proposal Defense.

HOW: This tab is divided into two parts. The upper part is for scheduling the Proposal Defense and is the responsibility of the doctoral candidate. The lower portion is the Defense results and is the responsibility of the Dissertation Committee Chair.

Part 1: Prior to the Proposal Defense, the doctoral candidate should first review the composition of the Dissertation Committee and ensure it is correct. If it is not correct, the doctoral candidate should make these changes on the [Dissertation Committee](#) tab prior to entering any information on the **Dissertation Project/Proposal Defense** tab. Once the correct Dissertation Committee has been confirmed, the Doctoral Candidate should enter the Proposal Title, date, time, and location of the Proposal Defense and then select **Save**. Optionally, the user may select **Send Defense Notification**. Notifications will then be sent to the student and the entire committee. The location may either be physical or virtual, but information for at least one is required.

Part 2: Upon completion of the Proposal Defense, the committee chair should enter the decision by the committee with regards to the student's performance. The chair may also enter a summary recommendation in the text box below or upload comments in the [Supporting Documents](#) tab. Please use the **Save Comments** button if entering text.

If the student is not recommended for passing the Proposal Defense, the chair should enter the comments in the text box or upload all supplemental materials in the supporting documents. This includes recommend with provisions, do not recommend and do not recommend with dismissal.

Upon clicking **Save Decision and Send Notification**, each committee member, including the chair will then receive a notification asking whether they agree or dissent from the decision. Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Note that these comments will be available to the student. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting Documents](#) tab and select Proposal Defense and then upload the comments.

A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Dissertation Committee, the Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have submitted Agree/Disagree, final approval is needed from DGS, Student, Supervisor, and Graduate College. Completion of this step will open [Graduation Requirements](#) and [Dissertation Defense](#).

Last Date Modified: 03/23

Setup -> Select Student -> Core Information -> Supervisor Appointment -> Plan of Study -> Candidacy Committee -> Candidacy Exam -> Annual Reviews -> Dissertation Committee -> **Proposal Defense** -> Graduation Requirements -> Dissertation Defense -> Submit Thesis -> Supporting Documents

Dissertation Proposal Defense

Information

Student Id: [Redacted] First Name: Yuyun Last Name: Zhong Email: [Redacted]

If your Dissertation Committee is not correct please select the Dissertation Committee tab above and update it before entering any information here.

* Title: [Text Input Field]

Please consult with each of your committee members first before entering this information

* Proposal Defense Date: [Date Picker] * Time: [Time Picker]

Building: [Dropdown] Location: [Text Input Field]

* Virtual Location (at least one location must be entered): [Text Input Field]

[Save Defense Info](#) [Save & Send Defense Notification](#)

Part 1: PhD Candidate should enter Proposal Defense title, date, time, and location. Then save and/or send a reminder notification to the dissertation committee.

Comments and Details of the Committee Decision

[Text Input Field]

[Save Comments](#)

* Decision of the committee **Information**

Recommend Recommend with Provisions Do Not Recommend Do Not Recommend with Dismissal

[Save Decision & Send Notification](#)

Part 2: Committee Chair should enter results and send notification to Committee here.

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this.

Information

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		y1663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroutis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

[Request Approvals](#)

Approvals

Student Approval Supervisor Approval DGS Approval Graduate College Approval

Committee members should indicate agree/disagree with result entered above and enter Comments.

After all Committee members have entered their votes, click Request Approvals.

Graduation Requirements

WHO: Doctoral Candidate, Program Manager

PURPOSE: To ensure the Doctoral Candidate is positioned to defend their dissertation and graduate from the university in good standing.

WHEN: One full quarter before the dissertation defense.

HOW: The Doctoral Candidate, in consultation with their Program Manager, should review all the information presented on this page. All corrective actions should be taken and the Doctoral Candidate should apply to graduate in the appropriate quarter.

Please review all the information below and address any outstanding issues as soon as possible. In particular, you must have a degree application on file via Drexel One portal and register for a single dissertation credit during your final quarter. The deadline to apply for a degree is yesterday, you missed it. Just kidding, wanted to see if you were actually reading this manual. For more information about applying for your degree, graduation dates and requirements, please visit the [Graduate College website](#).

Items marked outstanding below may prevent you from graduating or remain on your academic transcript permanently if not addressed now. Everything will need to be addressed for final degree clearance. If there are any outstanding issues, please see your Program Manager/Professional Staff or Faculty Adviser for assistance.

Complete the two surveys indicated and upload the confirmation e-mails in [Supporting Documents](#).

Once these steps have all been addressed, they require the assigned Program Manager approval such that your doctoral degree may be cleared in DegreeWorks.

Last Date Modified: 03/2023

Dissertation/Project Oral Defense

WHO: Doctoral Student, Dissertation Committee Chair

PURPOSE: To schedule and record the outcome of the Final Dissertation/Project Defense.

WHEN: The day, time and location should be entered prior to the dissertation defense. The results and committee member's agree/disagree votes should also be entered immediately following the completion of a dissertation defense.

HOW: This tab is divided into two parts. The upper part is for scheduling the Dissertation Defense and is the responsibility of the Doctoral Candidate. The lower portion is the Defense results and is the responsibility of the Dissertation Committee Chair.

Part 1: Prior to the Dissertation Defense, the Doctoral Candidate should first review the composition of the Dissertation Committee and ensure it is correct. If it is not correct, the Doctoral candidate should make these changes on the [Dissertation Committee](#) tab prior to entering any information on the **Dissertation Defense** tab. Once the correct Dissertation Committee has been confirmed, the Doctoral Candidate should enter the working Dissertation Title, date, time, and location of the Dissertation Defense and then select **Defense Notification**. Notifications will then be sent to the student and the entire committee. The location may either be physical or virtual, but information for at least one is required.

Part 2: Upon completion of the Dissertation Defense and within **48 business working hours**, the committee chair should enter the decision by the committee with regards to the student's performance. The chair may also enter a summary recommendation in the text box below or upload comments in the [Supporting Documents](#) tab. Please use the **Save Comments** button if entering text.

If the student is being given a pass or conditional pass, these comments should include a list of any and all revisions expected in the written dissertation and an expected timeline for completion of no

more than six months. If the committee believes the revisions are substantial enough to require more than six months, the defense should not be considered a pass or conditional pass.

A conditional pass should be chosen if the committee is requesting additional work be done that will not be included in the final written dissertation (e.g. clarifying certain points or answering questions raised during the defense) or if it is unclear whether the revisions will take less than six months.

If the recommendation is failed on the dissertation defense, the chair should enter the comments in the text box or upload all supplemental materials in the supporting documents.

Upon clicking **Decision Notification**, each committee member, including the chair will then receive a notification asking whether they agree or dissent from the decision. Each committee member should indicate whether they agree or dissent from the decision entered by the committee chair using the agree/disagree boxes by their name. All committee members have the option of entering comments or uploading a document of comments on the performance. Note that these comments will be available to the student. Selecting the **Comments** button on the line with your name will open a text box below the Committee Table specific to each committee member. To upload comments from another file (e.g. doc or pdf), please go to the [Supporting documents](#) tab and select Dissertation Defense and then upload the comments.

A unanimous decision must be reached for *pro forma* approval by the Graduate College. In the case of disagreement within the Dissertation Committee, the Committee Chair should consult with the relevant Director of Graduate Studies and the Graduate College. The Graduate College will be the final arbiter.

Once all committee members have submitted Agree/Disagree, final approval is needed from DGS, Student, Supervisor, and Graduate College. Completion of this step will open [Submit Thesis](#).

Last Date Modified: 03/2023

Setup -> Select Student -> Core Information -> Supervisor Appointment -> Plan of Study -> Candidacy Committee -> Candidacy Exam -> Annual Reviews -> Dissertation Committee -> Proposal Defense -> Graduation Requirements -> **Dissertation Defense** -> Submit Thesis -> Supporting Documents

Dissertation Defense

Information

Student Id: [Redacted] First Name: Yuyun Last Name: Zhong Email: [Redacted]

If your Dissertation Committee is not correct please select the Dissertation Committee tab above and update it before entering any information here.

* Title: Quack

Please consult with each of your committee members first before entering this information

* Dissertation Defense Date: 09/25/2020 * Time: 9:01 pm

Building: Matheson Hall * Location: 501

* Virtual Location (at least one location must be entered):

Defense Notification

Comments

Part 1: PhD Candidate should enter Dissertation Defense title, date, time, and location. Then send a notification to the dissertation committee.

Comments

Save Comments

Decision of the committee: Information

Pass Conditional Pass Fail

Save Decision & Send Notification

Please review the decision entered by the Committee Chair, and select whether you agree or disagree with this.

Information

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		y1663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroulis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Request Approvals

Approvals

Student Approval Supervisor Approval DGS Approval Graduate College Approval

Part 2: Committee Chair should enter results and send notification to Committee here.

Committee members should indicate agree/disagree with result entered above and enter Comments.

After all Committee members have entered their votes, click Request Approvals.

Submit Dissertation/Project

WHO: Doctoral Student, Dissertation Committee Chair

PURPOSE: To approve and submit the Final Dissertation.

WHEN: When all changes to the final dissertation have been completed and approved by the dissertation committee.

HOW: This tab is essentially the final step on the road to the doctoral success. Congratulations!!

Please check that your Dissertation Committee is correct. If it is not, please return to the [Dissertation Committee](#) tab and select **Update** before proceeding.

If you are requesting an Embargo on your dissertation/project such that it will have a delayed release to the public, please indicate so in the drop-down menu and answer yes or no. An embargo delays the online publication of the full text of your work on ProQuest and on Drexel's institutional repository. If you wish to request an embargo, you must specify that both here and during the ETD Admin submission process. All embargoes must be approved by your Committee Chair, and must specify the length of delay requested (6 months, 1 year, or 2 years).

If you choose an embargo and Request Approvals, an email will be sent to your Committee Chair requesting their approval. Once approved a notification email will be sent to the University Archivist at archives@drexel.edu.

Enter the title of your dissertation in the four text boxes below. These will be recorded to Banner to produce your doctoral degree. Each information field can hold only up to **60** characters and are set this way to display your dissertation title properly where needed.

After entering the title and today's date, you may use the comments field for any notes for your dissertation/project committee if needed. Then, select **SAVE**. Your committee will be notified. If you

have not already done so, please be sure to share the final version with them. Each committee member will then need to log into the system and select **Approve** or **Disapprove**.

After receiving approval from all committee members use the **Export to PDF** button to create your Committee Approvals Page. Using this page as the very first page, merge it with your dissertation. Then, upload your completed dissertation to ProQuest. (In addition, you may optionally upload your final dissertation to this database in supporting documents.) Once you receive the receipt from ProQuest that your dissertation has been received, upload that receipt in supporting documents. Next, select **Yes** for ProQuest receipt uploaded.

All Drexel University graduate theses and dissertations are submitted online via ProQuest's ETD Administrator tool, for publication in ProQuest's Dissertations & Theses. After students submit their dissertation or thesis, it will be sent to their graduate school for review. After the graduate school finishes reviewing, it will be delivered to ProQuest for publishing and archiving. Students will need to go to <http://www.etdadmin.com/drexel> and click 'submit' to create an account. Follow the steps to upload their document. This process will take approximately 20–30 minutes. For more information about ProQuest's ETD Administrator tool, please click [here](#).

Once all the steps are completed, final approval is needed from student, Supervisor, DGS and Graduate College.

Finally, please click **Submit** for all the final approvals. Congratulations!!

Last Modified: 03/2023

Setup - Select Student -> Core Information -> Supervisor Appointment -> Plan of Study -> Candidacy Committee -> Candidacy Exam -> Annual Reviews -> Dissertation Committee -> Proposal Defense -> Graduation Requirements -> Dissertation Defense -> **Submit Thesis** -> Supporting Documents

Submit Thesis

Student Id [Redacted] First Name Yuyun Last Name Zhong Email [Redacted]

Information

Deadline Date:
If your Dissertation Committee is not correct please select the Dissertation Committee below and update it before entering any information here.

* Are you requesting an Embargo? **Information**
Yes

* For how long? 1yr. Committee Chair Approval

* Title
1.
2.
3.
4.

* Submission date

Comments

Save Notify

Part 1: PhD Candidate should first answer whether an Embargo is being requested on the dissertation.

Enter the title and today's date, then notify your committee of the final submission.

Save Notify

Dissertation Committee

Full Name	Role	Agree	Disagree	Notes	Decision Date	Email	Institution	Department
Christopher Laincz	Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		cal38@drexel.edu	Drexel	Economics
Kapil Dandekar	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		krd26@drexel.edu	Drexel	Electrical & Computer Engineering
Jade Lo	Co-Chair	<input type="checkbox"/>	<input type="checkbox"/>	Comments		yi663@drexel.edu	Drexel	Management
Michelle Dolinski	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		mjd396@drexel.edu	Drexel	Physics
Aroutis Foster	Member	<input type="checkbox"/>	<input type="checkbox"/>	Comments		anf37@drexel.edu	Drexel	School of Education

Showing 1 to 5 of 5 entries

Final Steps

- After receiving approval from all committee members use the Export to PDF button to create your Dissertation Title Page. [export PDF](#)
- Using this page as the very first page, merge it with your dissertation.
- Upload your completed dissertation to Proquest <http://www.etsdadmin.com/drexel>
- Once you receive the receipt from Proquest that your dissertation has been received, upload that in supporting documents
- Upon uploading the receipt, select **Yes** for Proquest receipt upload and click **Save**.
- Finally, please click **Request Approvals** for all the final approvals. Congratulations!

* Have you uploaded your receipt from Proquest in Supporting Documents?
 Save

Request Approvals

Approvals
Student Approval - Supervisor Approval - DGS Approval - Graduate College Approval -

Part 2: Upon receiving the notification, each committee member needs to sign off by selecting "Agree" to indicate they have accepted the final version of the dissertation.

Part 3: Follow these on screen instructions carefully. Go relax, you're done, Doctor 😊

Set Up / Administrative Functions

The following functions are located under **Setup** at the top left. Not all functions are visible or available to everyone.

Manage Non-Drexel People (available to all) - Committee members from outside the University may participate on your advisory and examination committees. The outside members must bring scientific expertise to student's committee.

The Eforms system has its own database of committee members outside of Drexel University. If your outside member is in the database, you can find them by searching using their professional e-mail address. If you do not find an outside member via the search, you may need to add them to the database. To do so, under **Setup**, please select **Manage Non Drexel People**. To double check that an outside member is not in the database you can use the search function in the list below or review the list as it is in alphabetical order.

If you still do not find an outside member, please add them to the database. Enter their first and last names, institution, title and their professional e-mail address. Do not enter any personal e-mails such as gmail, hotmail, yahoo, etc. Once the information is entered, select **Save** to add them to database. Now when you search on the various tabs using the professional e-mail address for a Non-Drexel person, you should find this person and be able to add them to your committee.

Last, please go to [Supporting Documents](#). Enter the e-mail address of the new committee member, you have added and press return. Their name should appear here. Under document type, please select **CV**. Then use the **Add File** and **Start Upload** buttons to add the committee member's CV to the database. If successful, the CV will appear below the light green header bar at the bottom. Other documents related to any Non-Drexel person may also be uploaded here.

Student Doctoral Programs (available to faculty and admin) - This unique function is for handling doctoral students who have been in more than one doctoral program at Drexel University. This menu item is available for all faculty. Any historical or active student doctoral path can be found in Student Doctoral Program option. After Doctoral program is completed, the student is marked as Inactive in Banner. This will prevent students from logging to the Graduate College systems, they also will not show up through Select Student Search functionality, as we are only looking for currently active students. The main reason for this option is for faculty to be able to search for completed doctoral programs for inactive students. If student participated in multiple doctoral programs, the list of all student paths will be displayed.

Assign Admin Roles (available to admin) - This feature is largely only available to application managers and the Graduate College in particular. It is used to assign Drexel faculty and staff to key roles in this database. The roles are: 1) systems administrators; 2) departmental level faculty coordinator; 3) department level staff administrator; 4) college level staff administrator; 5) college level faculty administrators; and 6) Graduate College administrator. Each role serves as a specific function in this database.

Whenever there is a change at the College or Departmental level of a faculty Director of Graduate Studies, Associate Dean of Graduate studies, or professional staff doctoral Program Manager, the Graduate College should be informed so the appropriate changes can be made.

Batch Update Faculty (available to admin) - the ability to upload all faculty within your academic discipline in an excel File rather than inputting the information one by one. Please contact the Graduate College or e-mail eforms@drexel.edu to request a batch update.

Delete Comments (available to admin). Comments made within the system are permanent and cannot be undone by the writer. This feature is to maintain integrity of the data in the system and prevent accidental or fraudulent data alterations. However, if something was clearly entered in error or needs to be altered/deleted for a valid reason, the student or appropriate faculty should e-mail the Graduate College administrator, specifically requesting what is to be deleted/changed. The Graduate College will review the request and make the alteration. That e-mail request will be kept on file.

Dissertation Courses (available to admin) - This is a comprehensive list of dissertation courses at Drexel University. Dissertation Courses menu item should be used by Administrators to setup courses which are used for Dissertation credits count on the Core Information and Graduation Requirements screens. Courses can be added and removed, Dissertation Course Code must match values in Banner exactly to be counted. If you believe a dissertation research courses is not being counted properly and needs to be added or there was a change in a program's designated dissertation courses, please contact the Graduate College or send e-mail to eforms@drexel.edu to have this updated.

Email Templates (available to admin) - This is a comprehensive editable list of email templates used in this database to communicate with our constituents for review and approval.

Last Modified: 03/2023

Supporting Documents

Supporting documentation for a doctoral program can include a plan of study, academic notes, official transcript, candidacy exam, annual review, proposal defense, final oral defense, final dissertation and other documents. This is a repository for faculty, professional staff and doctoral students to keep track of their academic documents.

Under Supporting Documents, there are two distinct types. The first type is for Non-Drexel Person Documents and the second type is for doctoral students to store and keep track of their documents.

Non-Drexel Person

Non-affiliated Drexel people commonly serve on doctoral dissertation committee. Others who are considered experts in the field may serve as an external member of the candidacy or dissertation committee. Some may also serve as co-supervisor or co-chair. It is helpful to upload the external committee member's CV here, or other relevant information, for evaluation and approval.

Student Track Documents

As part of the process of obtaining a doctoral degree, doctoral students' key documentation may be associated with various milestones in the degree program (e.g. feedback on a proposal defense, comments during annual review, academic standing). Often, these achievements and milestones are documented in a paper or electronic format. This function acts as a depository for doctoral students to upload administrative forms, academic documents, etc. to preserve their documentation.

To upload a file, choose the **document type**, provide a **title or comment about the file**, select **Add Files**, choose the file from your computer or cloud, and click on the button **Start Upload**. Upon completion, below the light green header bar, you will see the document name, type, comments, the person who uploaded the document, and the date.

Last Modified: 03/2023

FAQs

Do I need VPN (Virtual Private Network) to access this electronic database?

The Cisco AnyConnect Secure Mobility Client software is used to establish a secure **Virtual Private Network (VPN)** between your off-campus computer or mobile device and the campus network in order to grant you access to restricted computing resources at Drexel such as file servers, databases, web sites, and privileged applications.

In order to access this electronic e-Forms database, you would need to download [Cisco's AnyConnect](#) for Windows or Mac. Please note that the **VPN Browser (WEBVPN)** will not work with the electronic database. You must download the Cisco's AnyConnect application and connect to "vpn.drexel.edu"

When I enter the system, the tab I want to go to isn't highlighted and I can't get there. What should I do?

*If you are a student, each tab represents an academic milestone in your doctoral degree program. In order to access the next sequential step, you need to complete each tab in a sequential order. If you believe you have completed all the prior steps and should have access, first try hitting refresh. Second, check the last available step and be sure that all information is complete including any required fields marked with a red asterisk *. On the same tab be sure to look to see if all approval checks at the bottom have been received. If that is complete and the next step is still not opening, contact your department's program manager for assistance. If together you can't figure out why the tab is not opening, please contact the Graduate College at eforms@drexel.edu.*

*For faculty and staff, after successfully logging onto the system, be sure to select your doctoral student first by using the **Student Search Box** and hit the **Confirm** button on the [Select Student](#) tab. That will take you to the student's [Core Information](#) tab. From there you can navigate to any tab that is currently open for that student. If you have done that and are trying to get to a tab that is not active but believe it should be, please see the steps in the preceding paragraph for students.*

My Faculty Adviser, Director of Graduate Studies and other professional staff cannot approve my eforms system.

New doctoral students who have just started will not have information on their faculty advisor, program manager, or Director of Graduate Studies. It is important that your professional staff adviser or program manager to select the appropriate administrators for you. These are the key players who will approve your milestones in the doctoral degree program. In the Core Information Tab, your assigned staff adviser will need to select the approver for College Level Faculty Administrator, Department Level Faculty Administrator, College Level Staff Administrator and Department Level Staff Administrator.

Can Non-Drexel advisors and committee members be included?

Individuals outside of Drexel who have expertise in a student's research field, and who have earned a doctoral degree from an accredited university or possess commensurate professional work experience, may serve as an external member of a student's doctoral thesis committee; however, these individuals cannot serve as the primary supervising professor or chair but they can serve as a co-supervising

professor or a regular committee member. To add a Non Drexel committee member to the database, please refer to the [Manage Non Drexel People](#) section under [Set Up/Administrative Functions](#).

How do Non-Drexel persons access the system?

To protect the safety and integrity of our academic records, non-affiliated Drexel members will not have access to our electronic e-Forms system; however, non-Drexel people can still participate in the approval process. The student or affiliated faculty or staff will need to use **Manage Non-Drexel People** by going to the **Setup tab**. In this guidebook, please see the [Manage Non Drexel People](#) section under [Set Up/Administrative Functions](#). Any time you appoint a non-Drexel person, an email will be sent to the individual just as with Drexel faculty members. However, the Non-Drexel members will be directed to a link outside this system which will capture their responses and record them in the Eforms system.

I have a document I want to upload. What should I do?

The electronic e-Forms database has a wide range of functions. In addition to highlighting your academic achievements and milestones in a doctoral degree program, it serves as a centralized depository for all other administrative forms. Go to [Supporting Documents](#) and you can upload important documents like academic transcript, plan of study supporting document, candidacy examination results and much more. To add a file, please click on the icon called **"Add Files"** select the file from your computer/cloud service and click on **Start Upload**. Upon completion, you will see the document name, file type and uploaded date.

I need to change my supervisor. How do I do that?

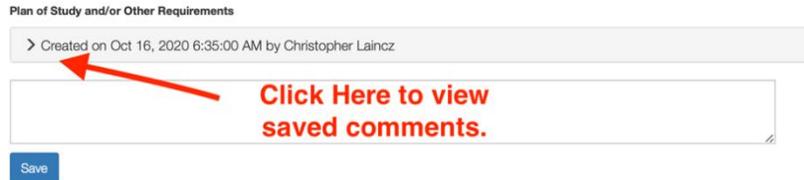
Changing advisors is common in some fields of study and less so in others. It usually requires that you follow departmental procedures. To update your supervising professor, go to [Supervisor Appointment](#) and click on **Update**. First, you will need to **remove** your current supervising professor under the heading titled Supervisors near the bottom of the page. An email notification will be sent to that person. Next, use the Drexel Person ID search box and locate the new supervising professor under the heading called Select and Appoint Supervisor(s). Upon completion, click on **appoint** and an email confirmation will be sent to the new person. The new supervising professor will need to logon to the electronic e-Forms database and confirm his/her/their participation.

I (or someone else) entered comments on a tab, but I can't see those comments. Where did they go?

After comments are entered, please make sure you hit the **Save** button. If you do not hit save, the comments will not get recorded and you will lose the information.



Note that once a comment has been entered, it will collapse to a selectable button to save space on the screen. To access saved comments merely click on the collapsed tab which will be identified by who and the date and time it was entered.



I want to change comments that I entered. How do I do that?

If you are adding to or following up on previous comments, please just create a new comment. If a previously saved comment really needs to be changed, please contact the Graduate College at eforms@drexel.edu. Note that comments are generally considered part of the permanent record to prevent records from being lost.

The program manager for our program has changed. How can I update that information for all the students?

Contact the Graduate College at eforms@drexel.edu. They have access to a batch update function under Setup if needed.

The Director of Graduate Studies for our program has changed. How can I update that information for all the students?

Contact the Graduate College at eforms@drexel.edu. They have access to a batch update function under Setup if needed.

What if my dissertation contains sensitive information that should not be publicly released, how do I request an Embargo?

An embargo delays the online publication of the full text of your work on ProQuest and on Drexel's institutional repository. If you wish to request embargo, you must specify that both here and during the ETD Admin submission process. When you are ready to submit your final copy of dissertation, you can request Embargo by logging on to the electronic e-Forms database, go to [Submit Thesis](#) and check off "yes" as the selection.

All embargoes must be approved by your Committee Chair and must specify the length of delay requested (6 months, 1 year or 2 years). If you choose an embargo and Request Approvals, an email will be sent to your Committee Chair requesting their approval, once approved notification email will be sent to the University Archivist at archives@drexel.edu.

How do I submit my thesis to the library? How do I upload my dissertation to Proquest?

All Drexel University graduate theses and dissertations are submitted online via ProQuest's ETD Administrator tool, for publication in ProQuest's Dissertations & Theses. After students submit their dissertation or thesis, it will be sent to their graduate school for review. After the graduate school finishes reviewing, it will be delivered to ProQuest for publishing and archiving.

Students will need to go to <http://www.etdadmin.com/drexel> and click 'submit' to create an account. Follow the steps to upload their document. This process will take approximately 20–30 minutes.

For more information about ProQuest’s ETD Administrator tool, please click [here](#).

Are the comments and uploaded documents available to the doctoral student?

At Drexel, we encourage transparency, openness and accountability in all communications. Doctoral students will have access to all comments and uploaded documents associated with their own progress under their Drexel credentials.

I am a Drexel faculty or staff member and I received an e-mail asking me to _____. What do I do?

First, make sure the email comes from an official Drexel email account. Then, if you are off-campus make sure you connect using desktop Cisco Anyconnect VPN. Then, click on the link to the eForm. You will need to review, confirm, and approve it.

- a) *Confirm an appointment*
- b) *Approve something*
- c) *Agree/Disagree with a decision*
- d) *Be aware that I have been removed from a role. (No action needed, just FYI)*

First, make sure the email comes from an official Drexel email account. If you are off-campus, be sure to first connect using Cisco Anyconnect VPN. Then click on the login link to the Eforms system. Navigate to the tab in question (e.g. Candidacy Exam Results, Proposal Defense, etc.). Find your name either under the decision rendered or the approval requested and check the appropriate empty box. If you have any questions you should first contact either the doctoral student or the appropriate committee chair by e-mail. If you are having technical difficulties, please send an e-mail to eforms@drexel.edu.

I am NOT a Drexel faculty or staff member and I received an e-mail asking me to _____. What do I do?

- a) *Confirm an appointment*
- b) *Approve something*
- c) *Agree/Disagree with a decision*
- d) *Be aware that I have been removed from a role. (No action needed, just FYI)*

First, make sure the email comes from an official Drexel email account. Click on the link to the website, read the information carefully, for answering the question and submit. If you have any questions you should first contact either the doctoral student or the appropriate committee chair by e-mail.

My faculty adviser told me there are new updates with the eforms system, but I am not seeing the new changes. What should I do?

A helpful solution is to delete your internet cached files and cookies using the instructions below.

INTERNET EXPLORER: Delete Cached Files and Cookies

Close all Internet Explorer windows.

Open a new Internet Explorer browser, then click Tools > Internet Options. ...

In the General tab, under Browsing History section, click Delete.

In the Delete Browsing History window, select the check boxes for Temporary Internet Files and website files and Cookies and website data.

SAFARI - Clear the Web Browser Cache

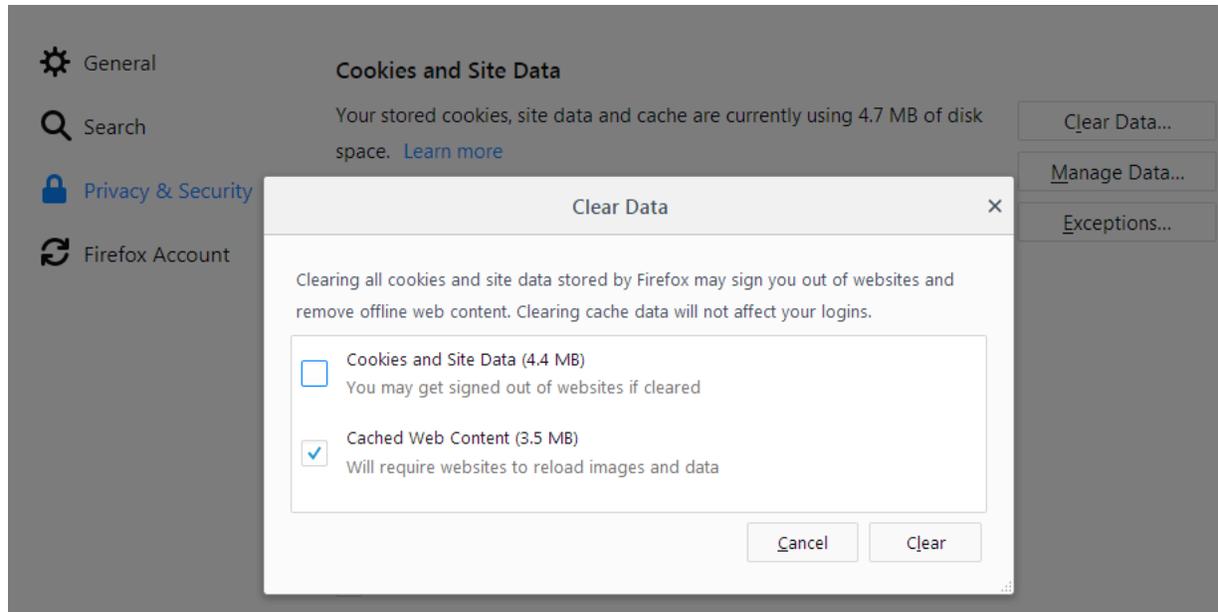
1. Click on the Safari drop-down menu and select Preferences.
2. Click the Advanced tab. Select the Show Develop menu in menu bar checkbox and close the Preferences window.
3. Select the Develop drop-down menu. Click Empty Cache.

CHROME - Clear the Cache

1. On your computer, open Chrome.
2. At the top right, click More .
3. Click More tools. Clear browsing data.
4. At the top, choose a time range. To delete everything, select All time.
5. Next to "Cookies and other site data" and "Cached images and files," check the boxes.
6. Click Clear data.

FIREFOX - Clear the cache

1. **Click the menu button**  **and select Preferences.**
2. Select the Privacy & Security panel.
3. In the **Cookies and Site Data** section, click **Clear Data....**



4. Remove the check mark in front of **Cookies and Site Data**.
 - i. For more information about managing site data, see [Manage local site storage settings](#).
5. With **Cached Web Content** check marked, click the **Clear** button.
6. Close the [about:preferences](#) page. Any changes you've made will automatically be saved.

I need additional support. Who can I contact for help?

Please send an e-mail to eforms@drexel.edu.

I have some minor and/or major complaints about the system. Where should I send them?

Please send all complaints directly to newsadmin@whitehouse.gov.

FAQs Last Modified: 03/2023