User's Guide to the System of University Organizations of Students (UOS).

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Version no.	Version date	Description	Filename
1.0	31.10.2023	The first version of the document	SGH - User Manual UOS 1.0
1.1	20.05.2024	General updates	SGH - User Manual UOS 1.1

Table of Contents

1   Introduction

The System of University Organizations of Students was planned as a new IT solution for the SGH Warsaw School of Economics, designed to support the management of university student organisations and the processes involved in planning, conducting and monitoring academic projects. The system is intended to serve both university staff and students, allowing access for selected people to particular functions of the System, according to roles and permissions granted. The system is built on Microsoft's Power Platform technology.

2   Definitions

DOS administrator	Administrator of the Student Services Department
FRS	Project is funded by the Student Finance
MZUOS	Module for the Management of University Student Organisations
UOS, Organisation	University Student Organisations
PA	Academic project
RKiO	Council of Students Union and Organisations
UOS system	Information system to support the organisation's project activities SGH students
APR	Academic Project Request

3   Access to the System of University Organizations of Students

The UOS can be accessed via a web browser from a personal computer or mobile device and by selecting the address: https://sghuos.crm4.dynamics.com/.

The system also allows access by logging in to the Microsoft 365 platform https://www.microsoft365.com/ and then, after pointing to *Apps* in the platform's side panel, selecting the application called 'Student Organisation Management'.
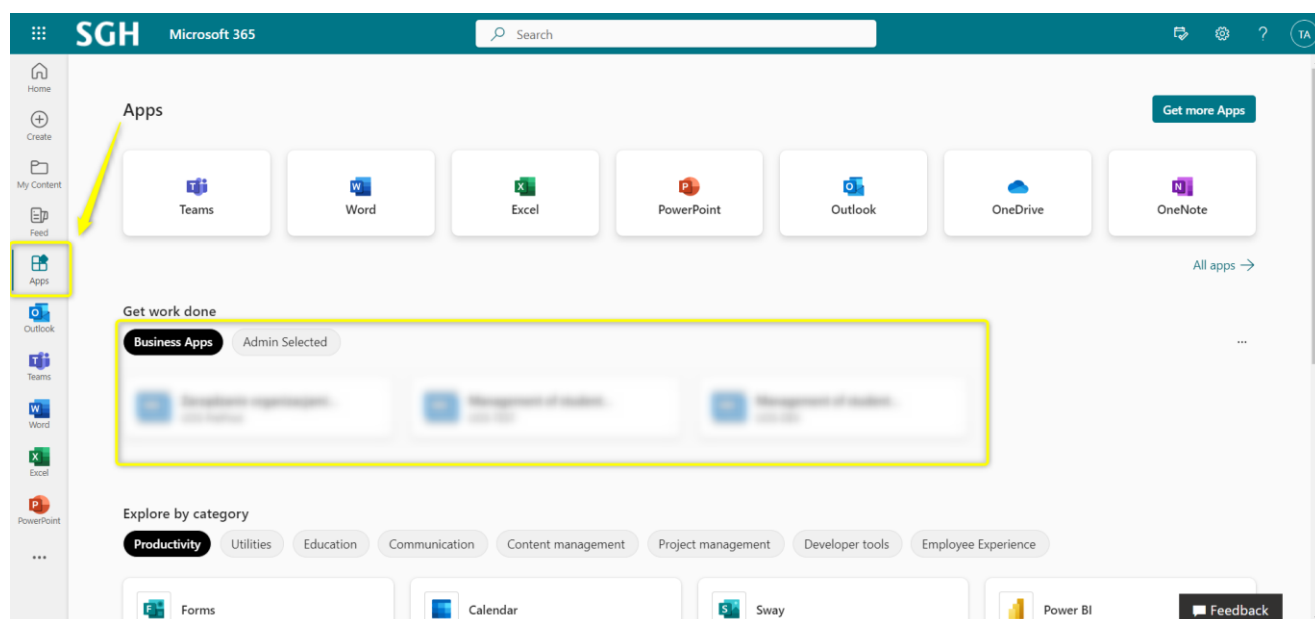

Figure 1 Navigation to the UOS

The UOS system can be accessed by individuals in the following roles at SGH:

SGH staff and units - Vice-Rector for Teaching and Students Affairs, Chancellor, Finance and Account Unit, DOS Administrators, Business Cooperation Team, Promotion Unit, Data Protection Officer, Education Organization Unit, IT and Technical Infrastructure Team, Low Current Installations Team, Press Officer, Legal Advisor,

Students - Council of Union and Organisations, Chairperson of the Student Council, Board Members and Organisation Supervisor, Delegates, Project Coordinators and those designated as responsible for accountability.

4   Personalisation of application settings

The default language of the UOS system is Polish. The system allows you to change the interface language to English. To change the settings for English speakers, go to Personalisation settings, then the *Languages tab*. In the case of changing the time zone, the settings are in the *General tab*, while the displayed formats are in the *Formats tab*.
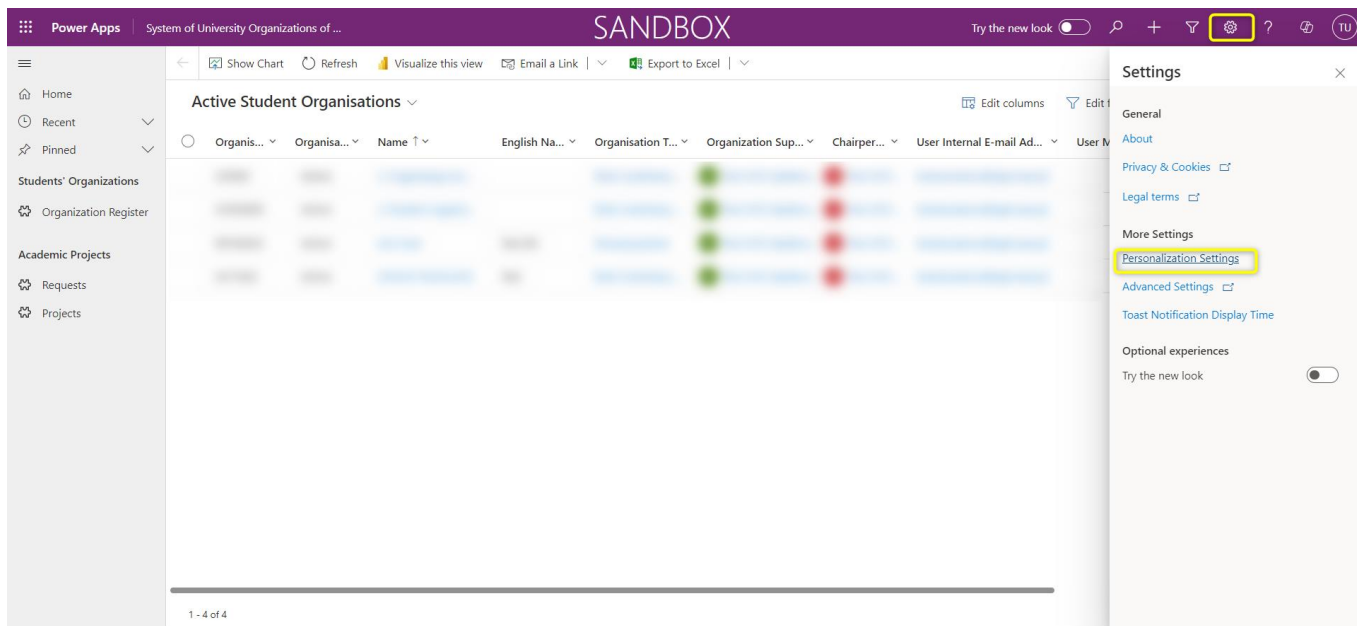
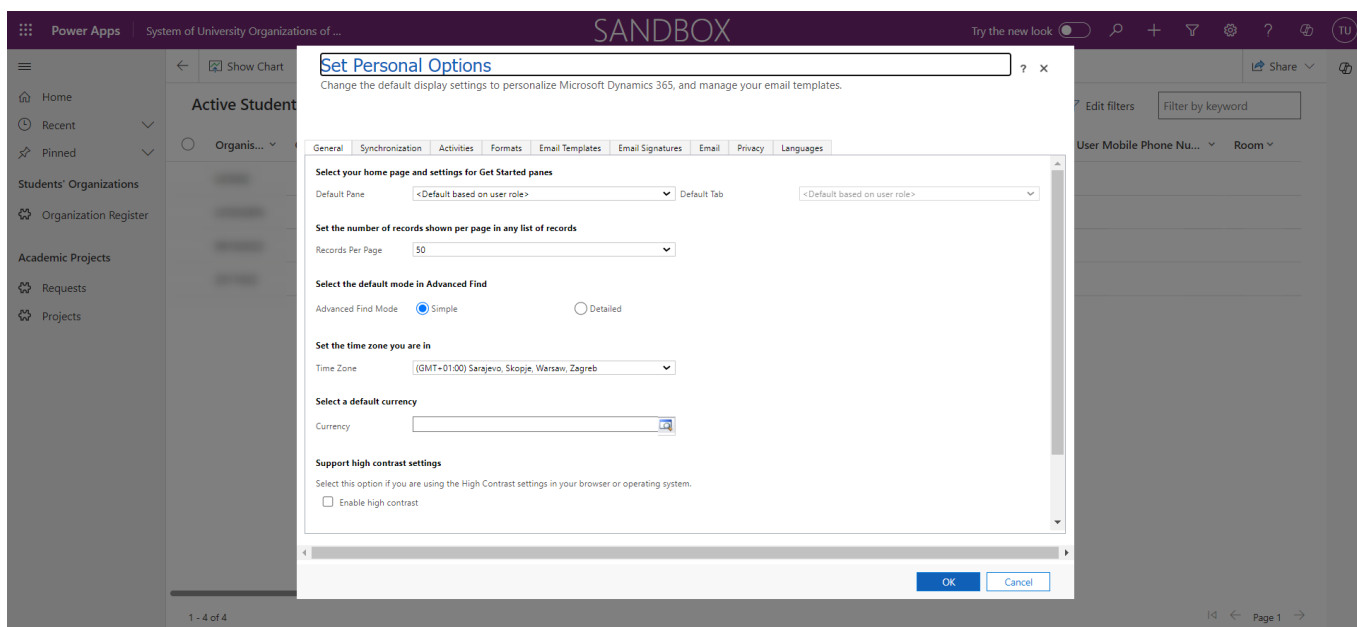*Figure 2 Navigation to personal settings*
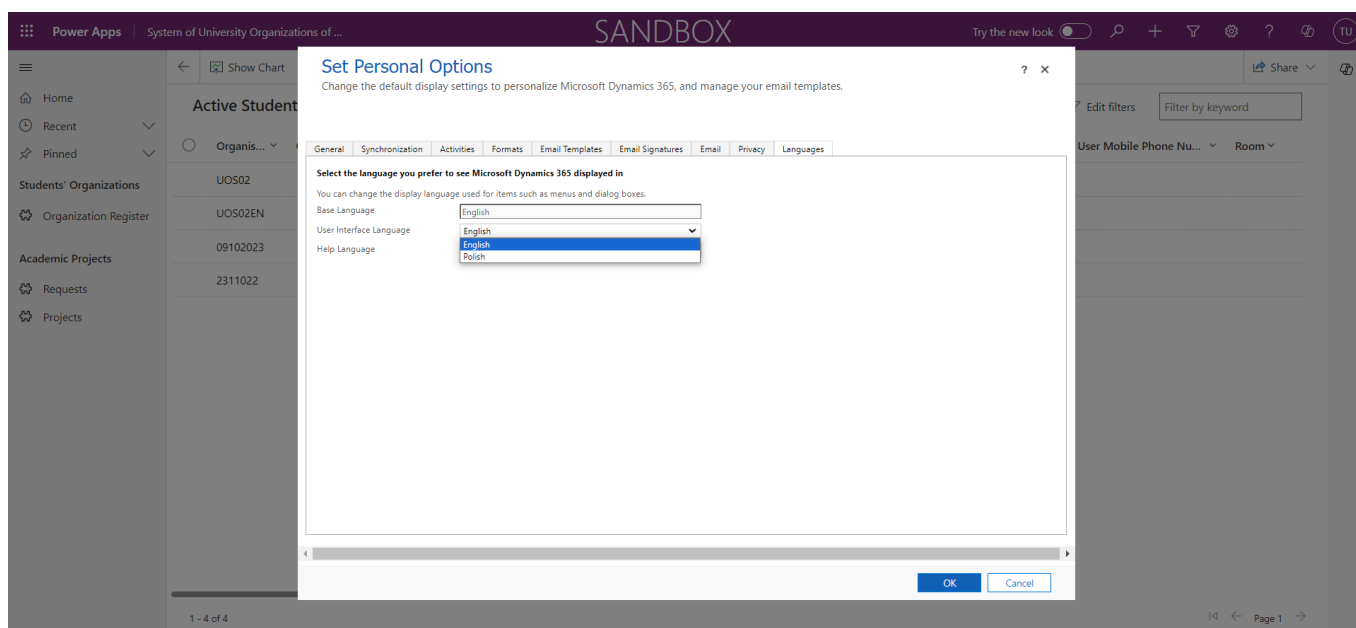

Figure 3 Personal Options - General

Figure 4 Personal Options - English

5 Module - Management of the University Student Organisation

5.1 Register of university student organisations

The register of university student organisations presents a list of all currently registered and active university student organisations. The register also allows access to archive data of student organisations. The UOS Register is accessible from the side panel *System of University Organizations of Students*, then *Register of Organisations*.

Access to the register, to the extent consistent with the defined roles and rights, is available to:

- Access to the data of all student organisations - Vice Rector for Teaching and Student Affairs, Chancellor, Finance and Account Unit, DOS Administrators, Business Cooperation Centre, Promotion Unit, Data Protection Officer, Education Organization Unit, IT and Technical Infrastructure Team, Low Current Installations Team, Press Officer, Legal Advisor, Council of Union and Organisations, Chairperson of the Student Council
- Access to selected student organisations - Supervisors and students' view of the register is restricted to the list of organisations to which they belong or are supervisors.

In the register, the basic information about the UOS consists of the following data: Organisation *Code, Organisation Status, Name, Name (English), Organisation Type, Organisation Supervisor, Chairperson, University Email (Chairperson), Mobile Phone (Chairperson), Room, Link to Organisation Website, Date of Creation*.
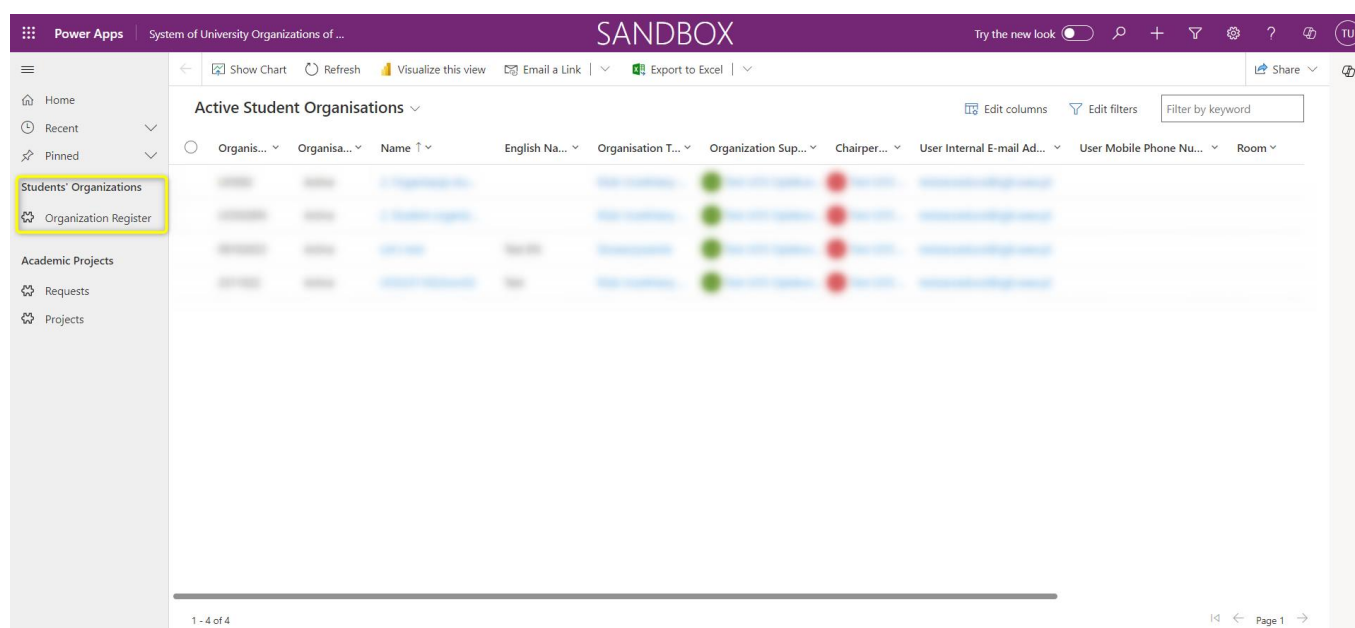

Figure 5 UOS register

The user has the following views available:

- *Active Student Organisations* - active UOS sorted alphabetically by name by default
- *All Student Organisations* - working, i.e. organisations in the registration stage and active UOS sorted by default by working status and then active, and by date of modification from the latest
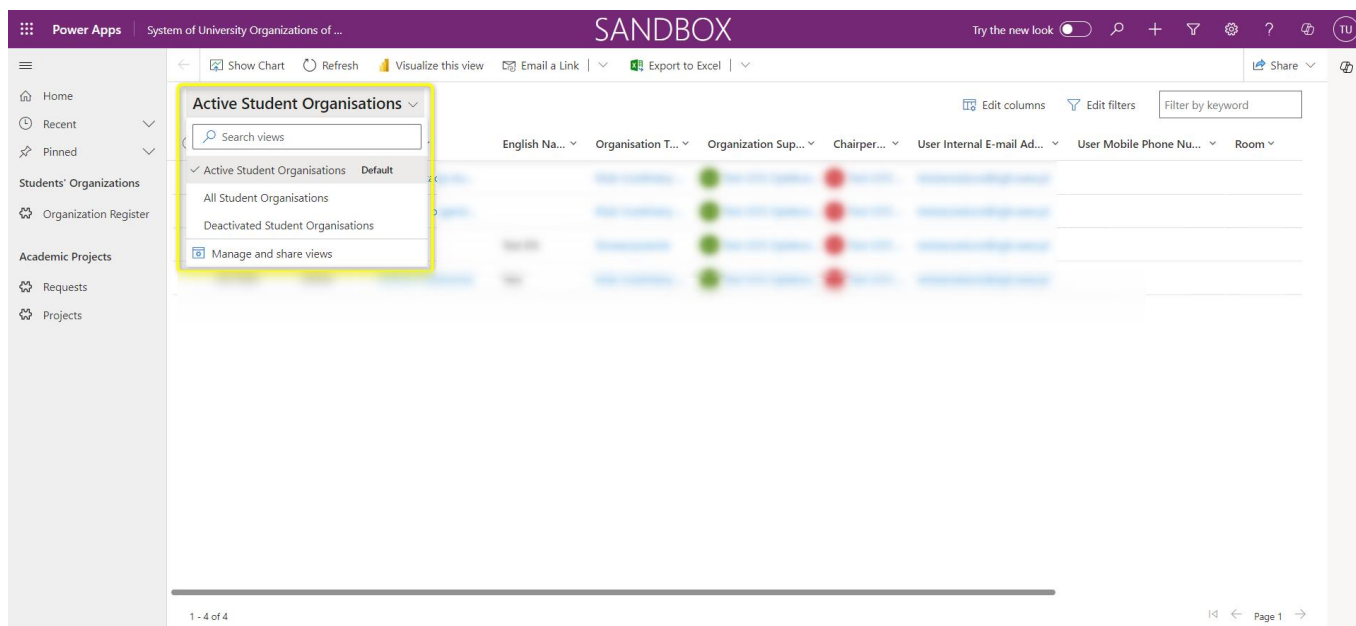- *Inactive UOS* - archived UOS sorted alphabetically by name by default

Figure 6 Access to views of the UOS register

The system has the flexibility to expand the available data in the view. Adding new columns personalised exclusively for the user using the system is possible by selecting the *Edit Columns* button. The user also has the option to set the filtering of the list via the *Edit Filters button*.
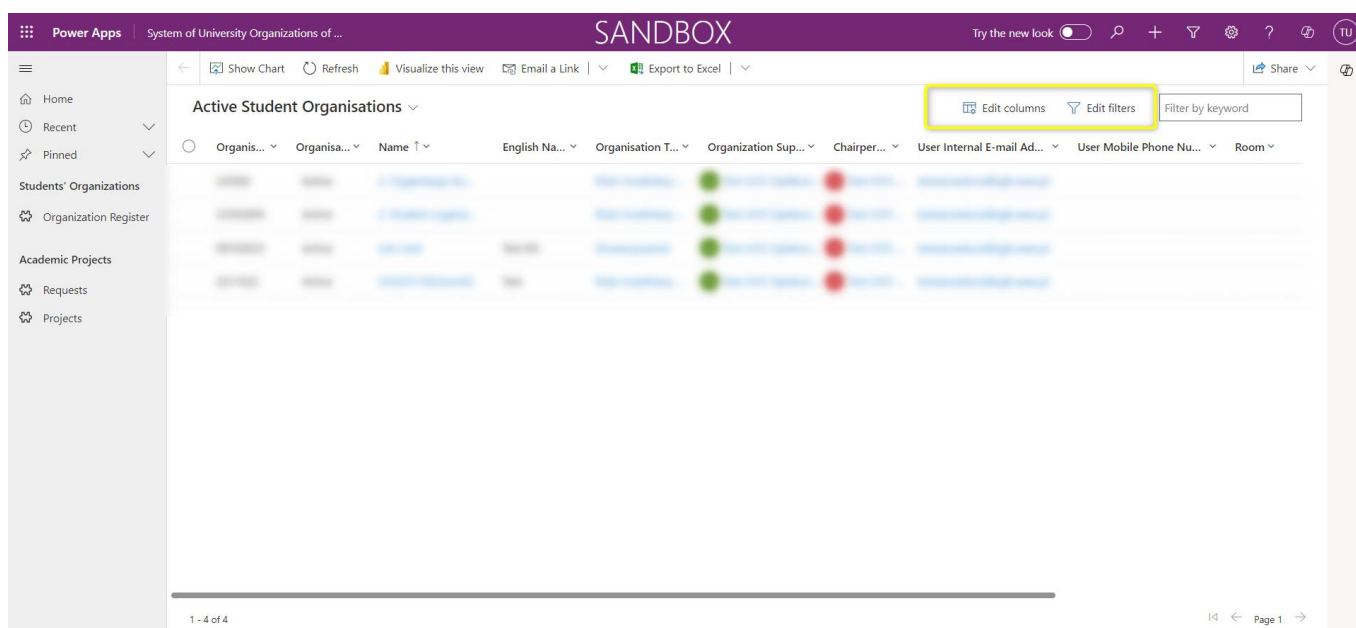

Figure 7 Editing columns and filters

Helpful information on filter management is also available in the Microsoft Power Apps documentation: https://learn.microsoft.com/pl-pl/power-apps/maker/model-driven-apps/create-edit-view-filters.

5.2 Management of university student organisations

In order to set up a new student organisation, you should apply to the Student Services Department and carry out the registration in accordance with the documents available on the website: Activities of student organisations | SGH | SGH Warsaw School of Economics. Once the student organisation has been established and activated, the Board Members gain access to the System and the data of the selected UOS in which they carry out management functions. The activation of UOS Board Members is carried out by an employee of the Student Services Department on the basis of documents and authorisations held. When activating access to the System, an email is sent to the Board member and a message in MS Teams to confirm membership of the UOS.

A member of the organisation's Board of Directors only gains access to the System after accepting the approval to join the UOS, which is sent together with the processing information via the *Approvals* application. Rejection results in not being added to the organisation and not gaining access to the System. The screen below shows the content of the message.
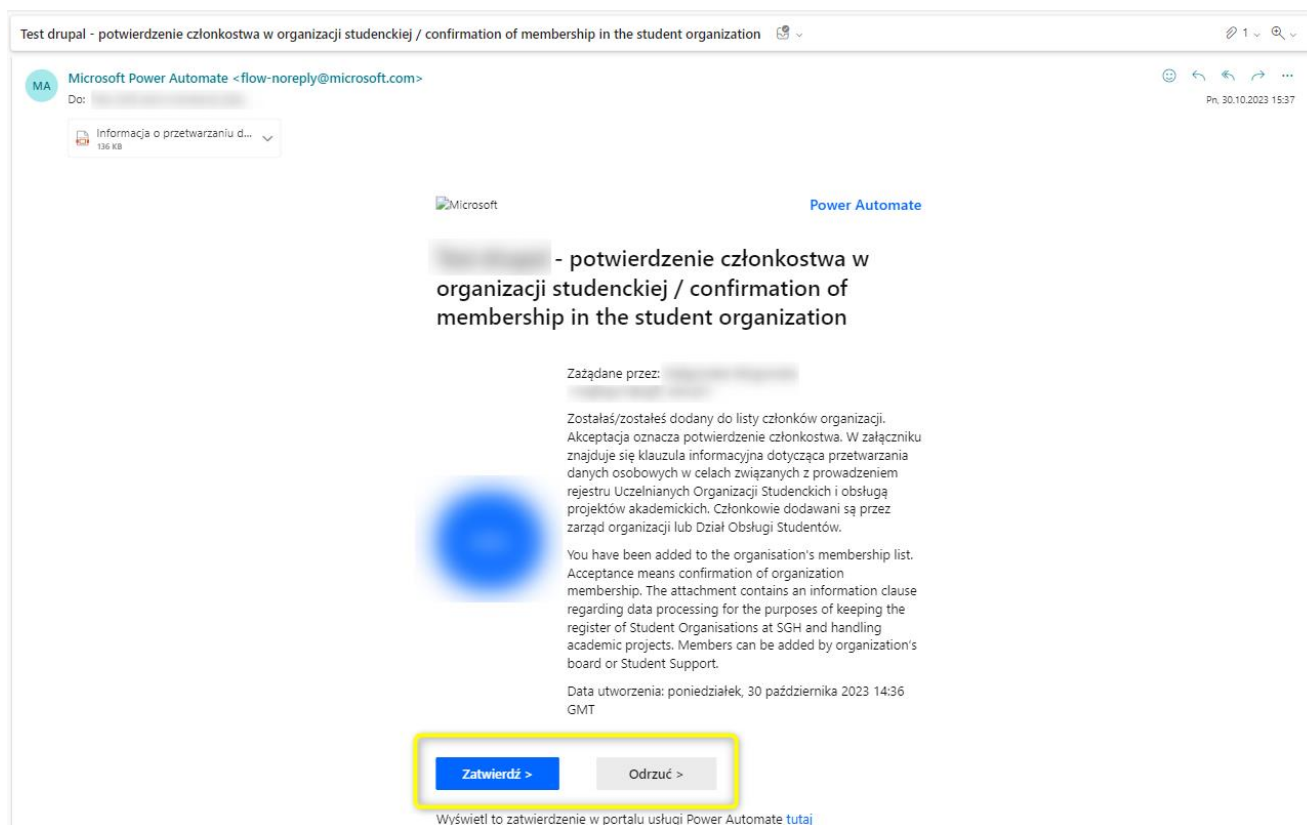

Figure 8 Approval sent in Outlook

An authorised person accessing the UOS Register can access the details of a student organisation. To access the UOS details, click on the link pointing to the organisation name.

Data about the organisation is presented on the following tabs: *Basic Information*, *Members*, *Board Members, Rooms*, *Organisation Links, Attachments*, *Reports*. The data scope of the individual tabs is presented in the screenshots below.
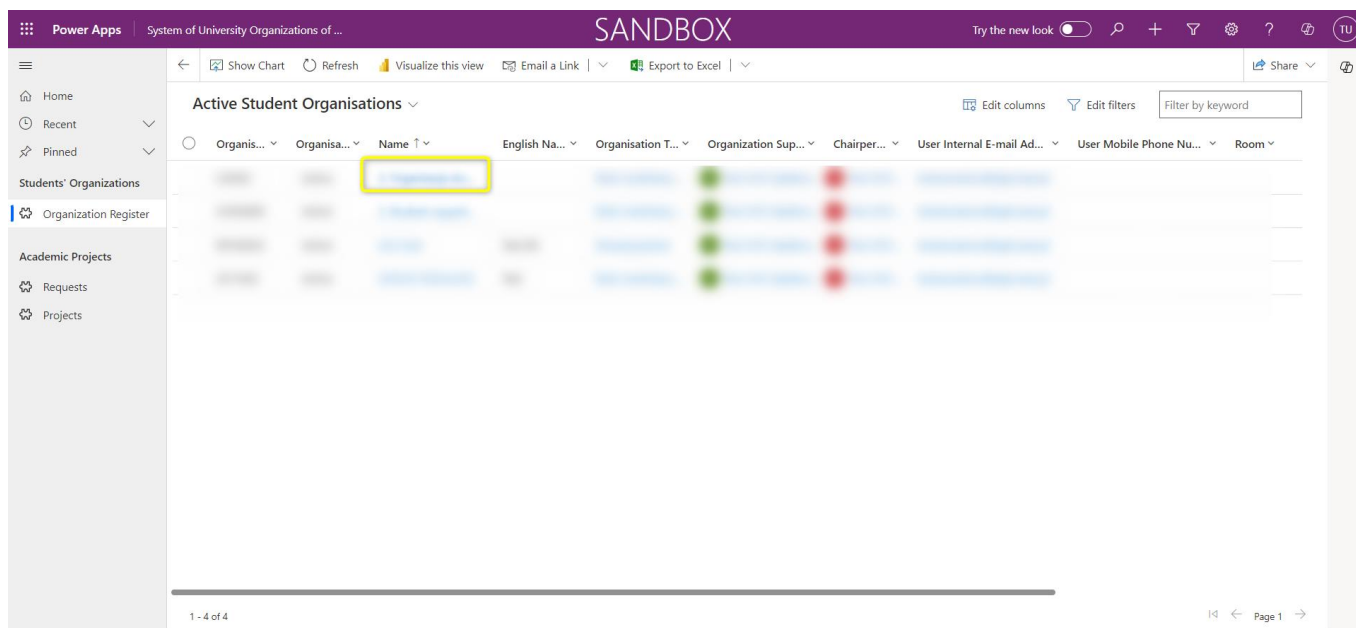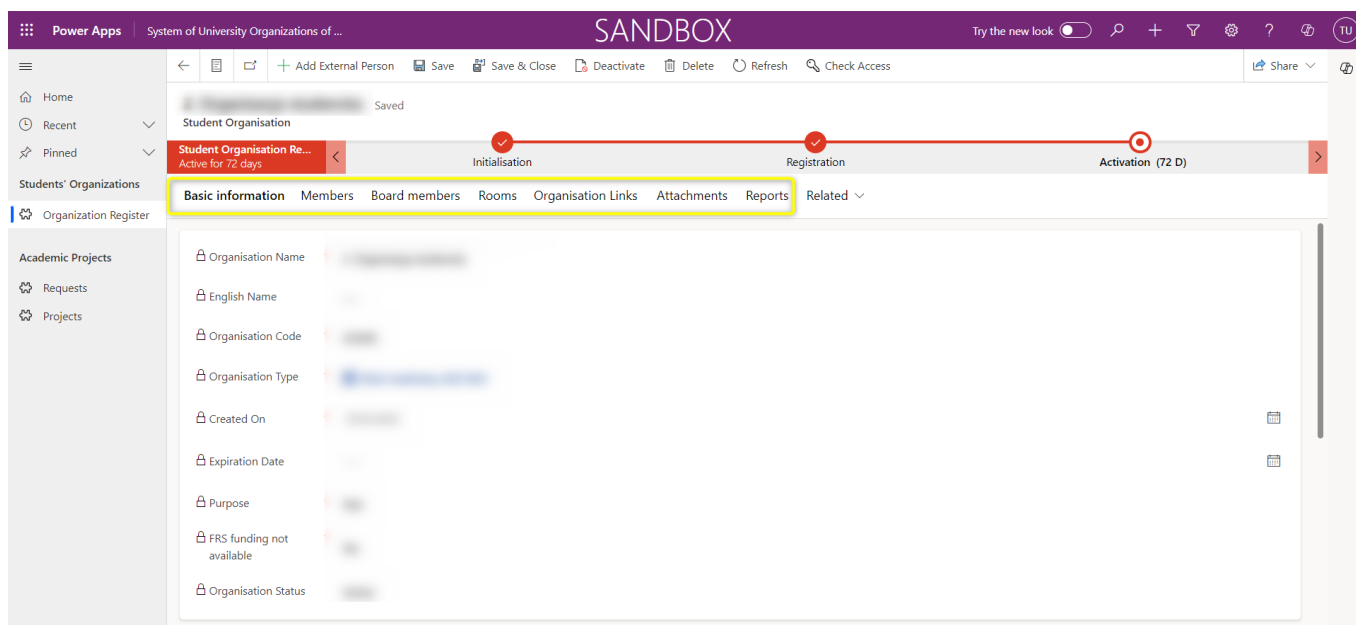
Figure 9 Switch to organisation details

Figure 10 Organisation details

5.2.1 Basic information

The information available on the tab is: Organisation *name, English name, Organisation code, Organisation type, Creation date, End date, Purpose, FRS funding, Organisation status,* Supervisor information.

Changes to the *Basic Information* tab can only be made by a member of the Student Services staff on the basis of the relevant documents.

Figure 11 Basic information

5.2.2 Members

The Members section allows you to manage the members of the UOS. The Board Member also has the ability to add or remove a member to the organisation. Board member via the Add member from database button. The system is integrated with the USOS system and up-to-date lists of active students are downloaded from the USOS system along with current student data. The Board Member and the Supervisor are able to add a new member to the organisation who is an active student. Adding a new member is done by completing their system login. **Note - once a UOS member has been added, the System does not return a message of successful addition of a member of the organisation, nor does it close the window, hence after selecting the Add User action, the window must be closed manually.** If a member is added incorrectly, you should also close the window and start completing the username again.

When adding a UOS member to the System, an email is sent to the member and a message is sent in MS Teams to confirm UOS membership. Pending approval to add to the organisation, the added member will appear in the *Potential Members* list. Once the confirmation is sent, he/she will go to the list of *Members of the organisation*. If membership approval is rejected, he/she is removed from the *Potential Members list* from where he/she can access Contact Information and Student Programme Information.
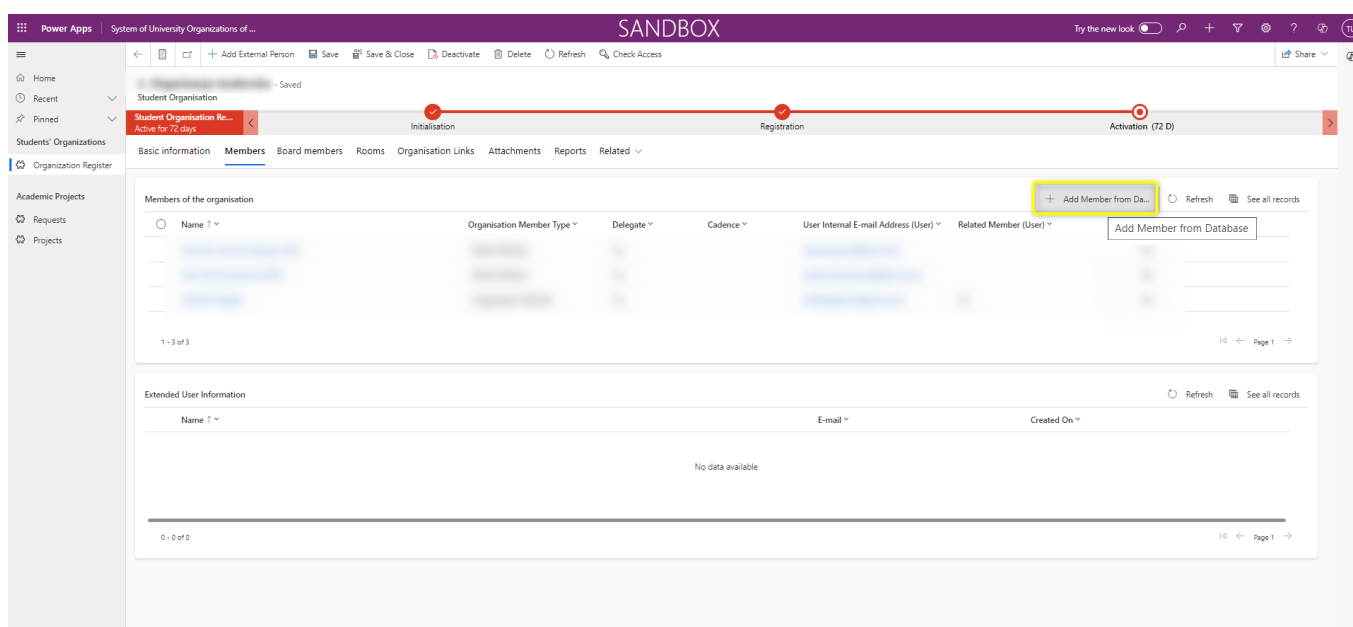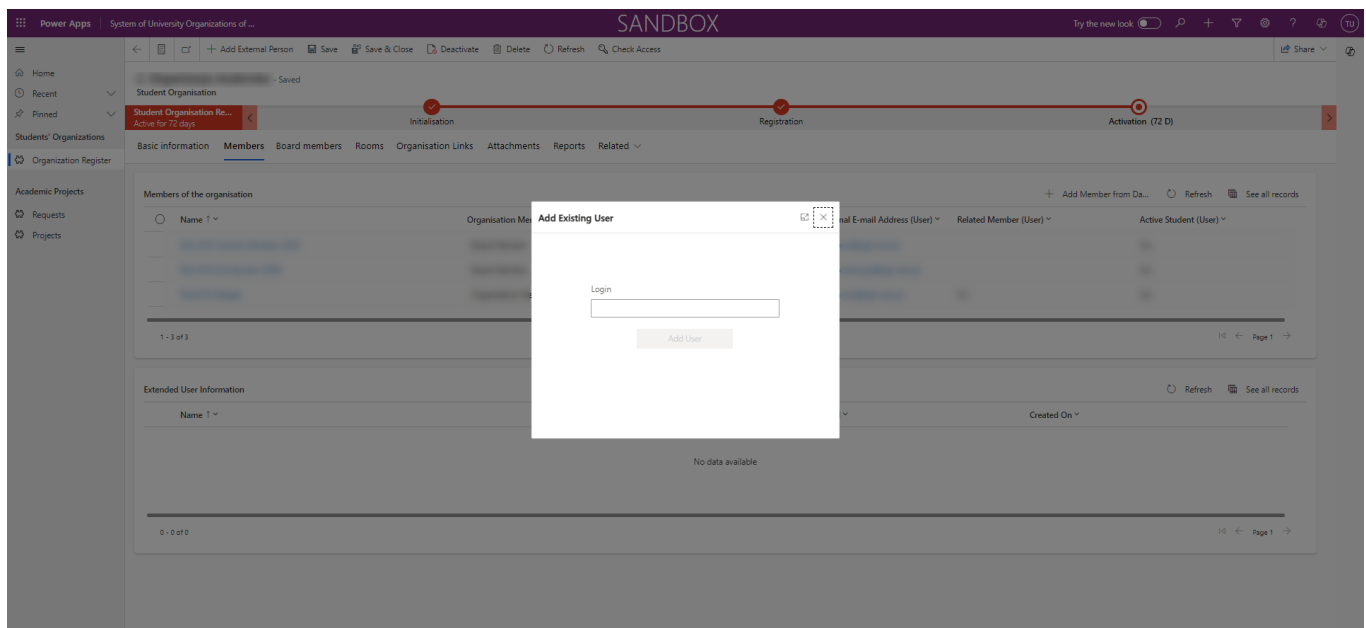

Figure 12 Adding an organisation member

Figure 13 Adding a new member login

By selecting a person from the list of members, an authorised person (Board member, Supervisor, DOS Administrator) is redirected to extended information about the user after selecting an organisation member from the list of *organisation members.* From this level he/she can access information from the views: *Role in Organisation* and *Student Information*. Changes to the *Role* in Organisation tab can only be made by the DOS Administrator and in special situations by the organisation's tutor.
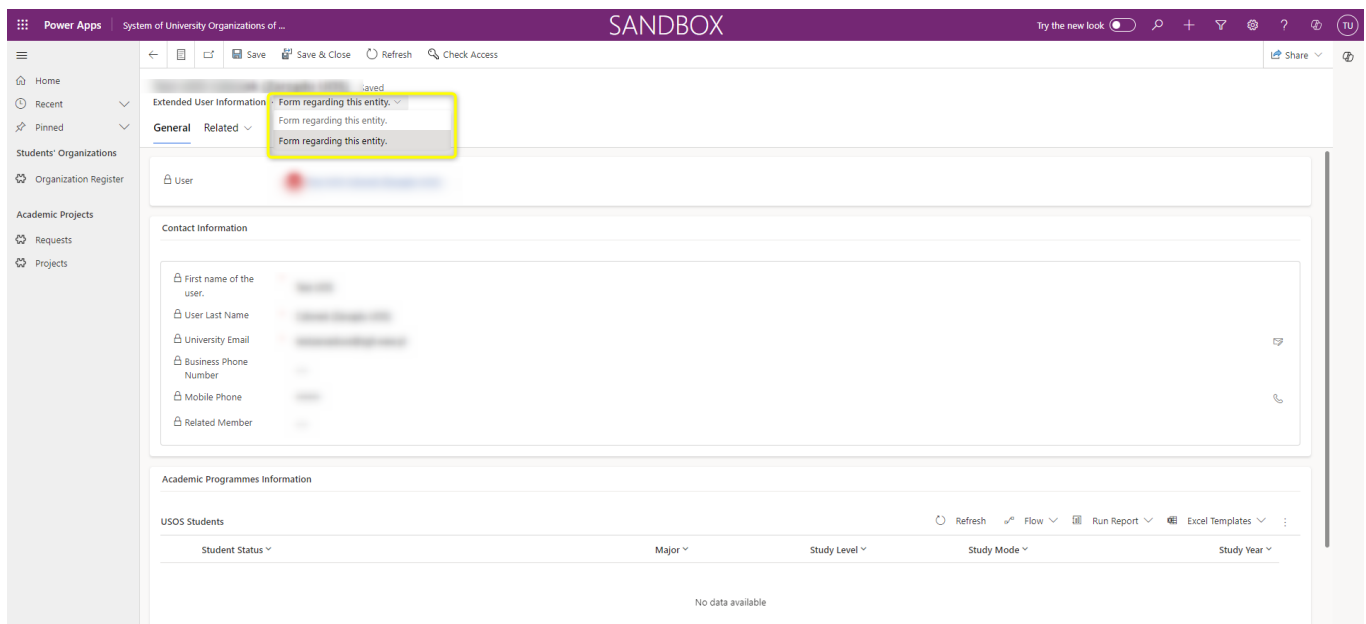
Figure 14 Information about student

The organisation's supervisor has the ability to manage the following parameters about an organisation member: *Delegate, Term of office*. Marking a person as a Delegate and indicating the current term of office is important at the stage of processing the Academic Project Application.

Attachments added from the *Role in Organisation* level will only be available within the selected organisation. If a student belongs to more than one organisation the role settings and attachments will be relevant to those

expected within the selected UOS.

Figure 15 Role in the organisation

When a member's name is indicated, they are redirected to the system information, attachments added from this level will be available throughout the system, regardless of their assignment to a particular UOS. This means that if a student belongs to more than one organisation, by indicating any UOS and then selecting its name in *Student Information,* the user will access global information.

Figure 16 Navigation to user information

Removal of a UOS member can be done by a member of the UOS Board. To delete a member of the organisation, mark the selected person by ticking the checkbox and then select the Delete option displayed dynamically.

Note - Only members of the organisation who do not have a role on the UOS Board can be removed. If it is necessary to remove members with a role on the Board of Directors, changes to the Board of Directors must first be made (implemented by amending the UOS documents and changing the Board of Directors by the

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DOS Administrator).
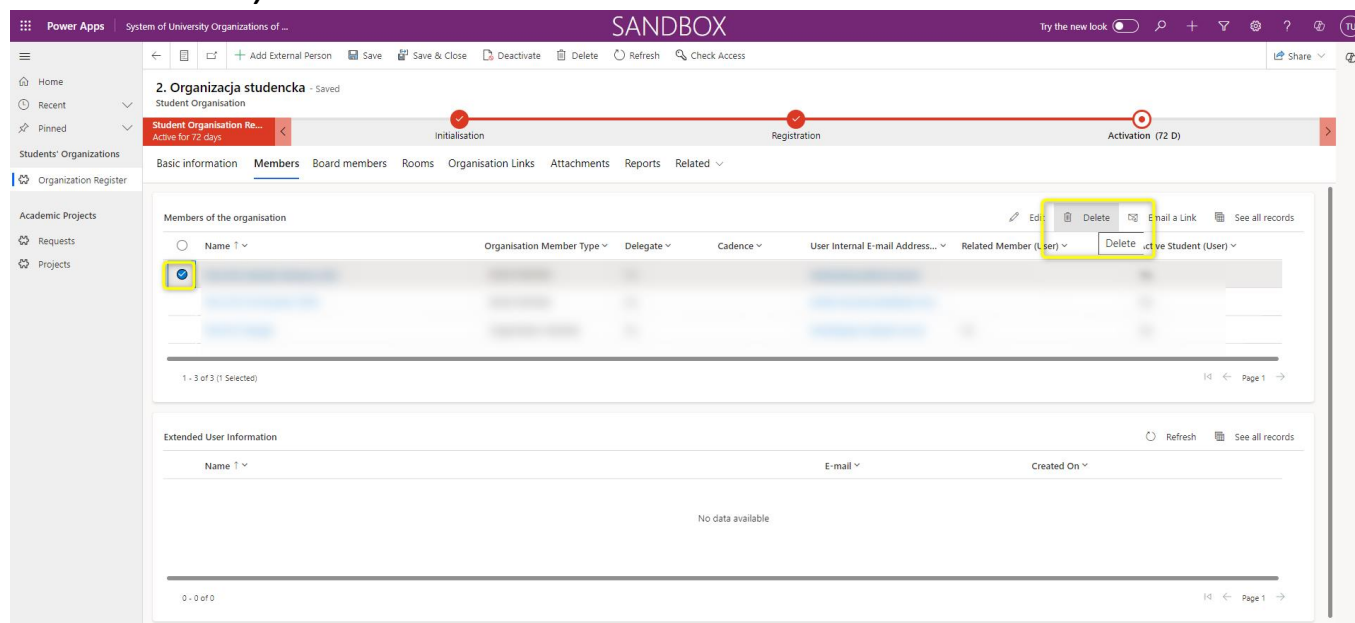
Figure 17 Deletion of an organisation member

The system also allows for associate members of organisations to be recorded within a given UOS. To add an associate member please contact Student Services.

5.2.3 Board members

In this section you will only find a list of Board members with information, i.e.: role on the Board, email address, whether he/she acts as a delegate, together with information on the term of office, whether he/she is a founder of the organisation and whether he/she is an active student.

The designation of a given UOS member as a person with a role on the Board of Directors is proceded on the basis of the documents of the UOS in question and is carried out by the DOS Administrator.
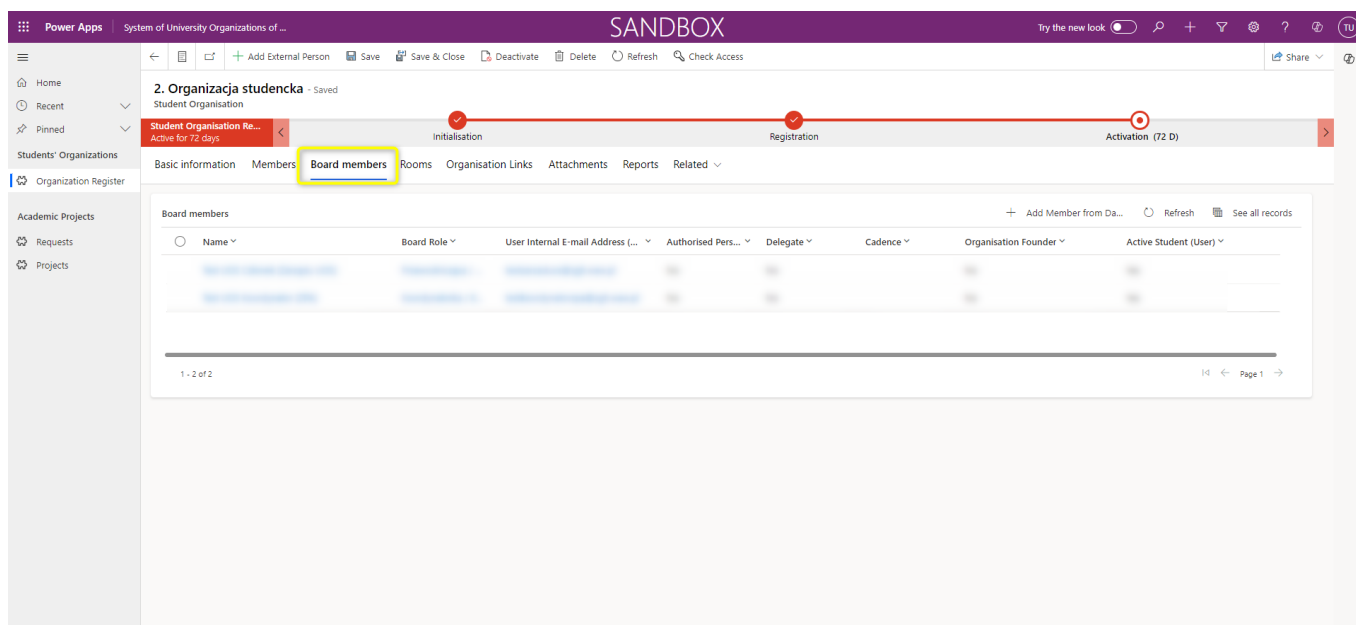
Figure 18 Board members

5.2.4 Rooms

In the *Rooms* section, there is a field for indicating or modifying the Rooms allocated to a student organisation.

In addition to the DOS Administrator, students with the role of *Council of Union and Organisations (COC)* have editing access.

If a room is missing from the dictionary, please contact the DOS Administrator.
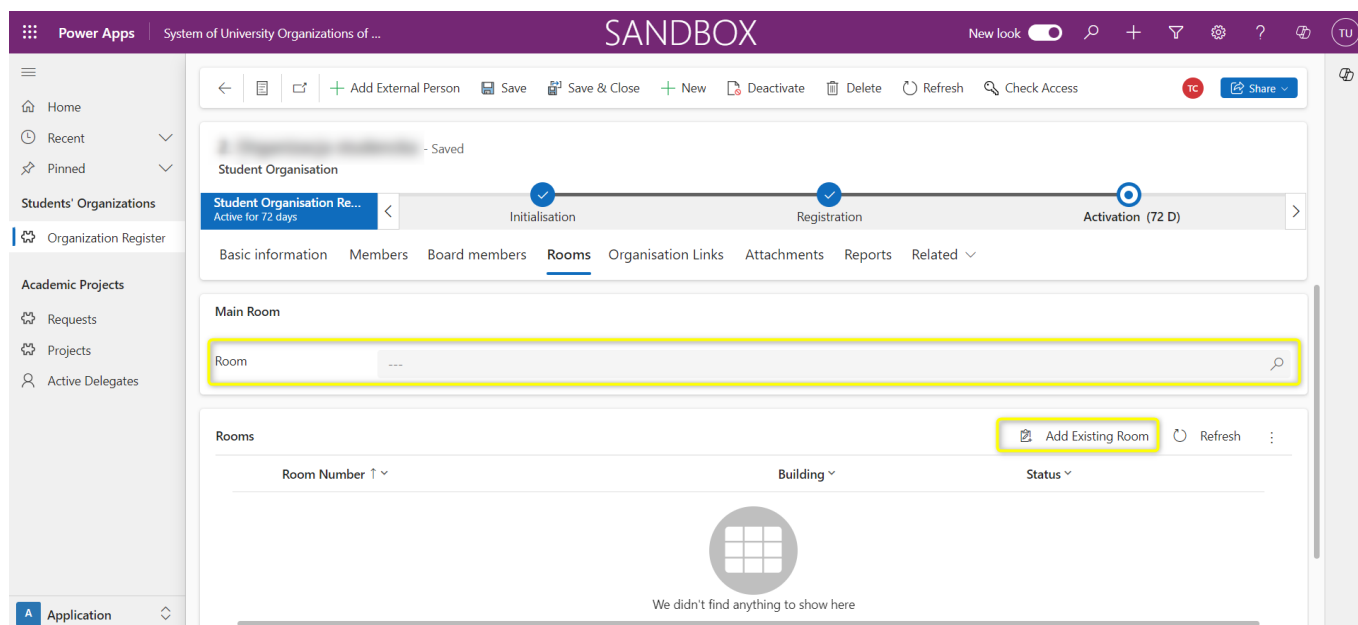
Figure 19 Addition of a UOS room

5.2.5 Links of organisations

In the *Organisation Links* section, the authorised user indicates the link to the organisation's page and additional links by selecting the *New Organisation Link entity* button.

Editing of links is possible for the Board Member and the Supervisor of the organisation.
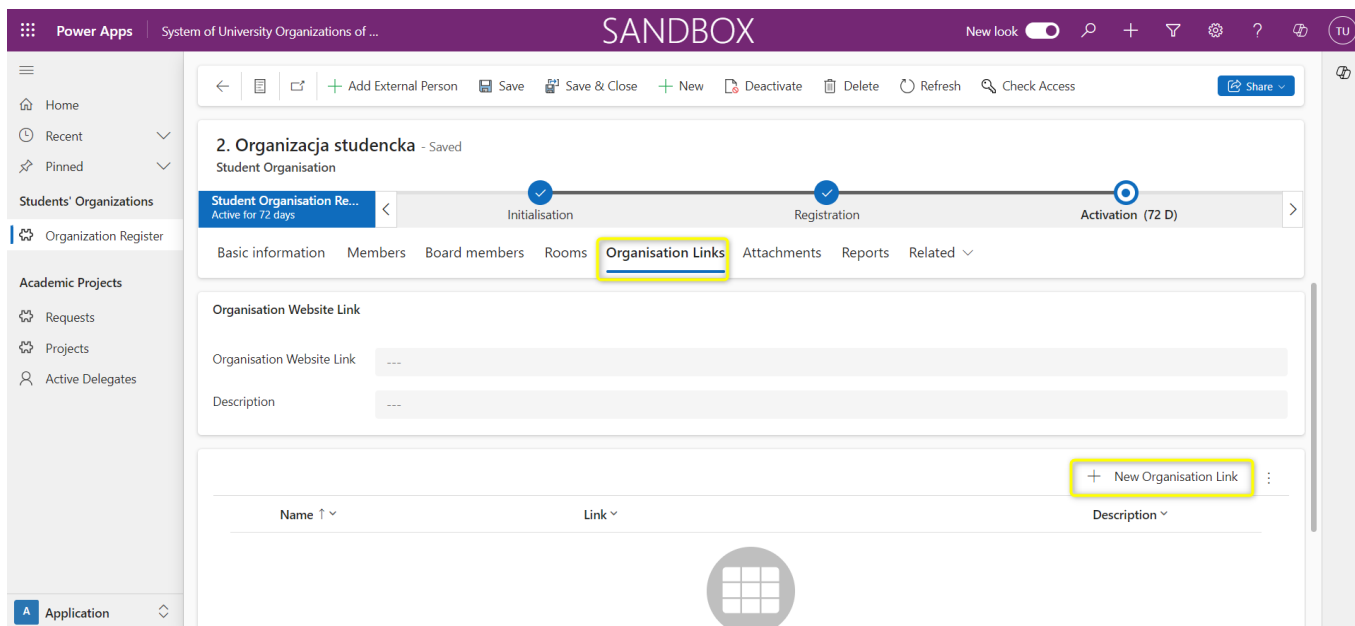
Figure 20 Organisation links

5.2.6 Attachments

In the Attachments section, it is possible to add files for an organisation.

Editing of attachments in the *Attachments* section is available to Board Members, the Organisation Supervisor and the DOS Administrator.
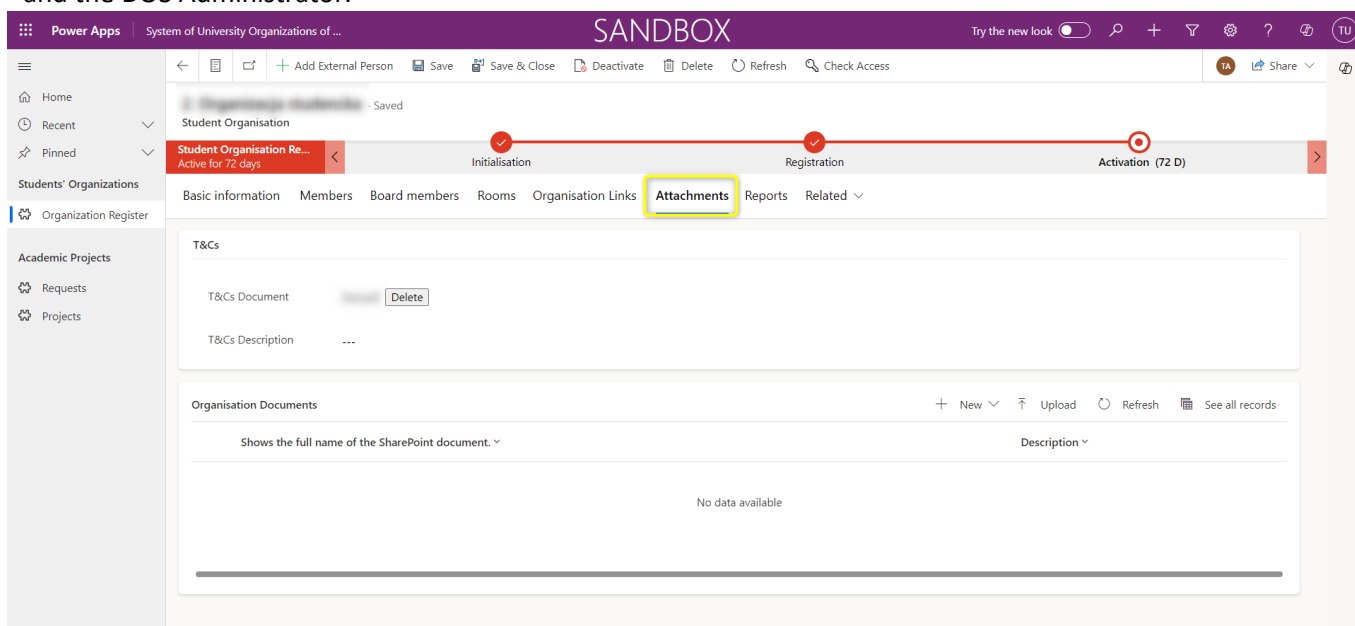
Figure 21 Attachments

5.2.7 Reports

In the *Reports* section, the Board Member and the Supervisor of the organisation have the possibility to generate and view the UOS activity report.

To generate a report, go to the organisation's details and then select the *Generate Report* button in the *Reports* section. A window will appear where you indicate the defined reporting period for which the report is generated. Reporting periods are created by the Student Organisation Department. When there is an upcoming reporting period, all members of the UOS Board and the Supervisor will receive an email notification.

Note - After selecting the Generate Report button, the window must be closed manually - currently in the system it is not closed automatically.

If the report does not appear immediately in the *Organisation Reports* table, click on the *Refresh* button.

The report consists of information on the number of members, the number of part-time members, details of the person generating the report, details of the organisation's supervisor, a list of the organisation's members, a list of completed and completed academic projects and additional appendices.
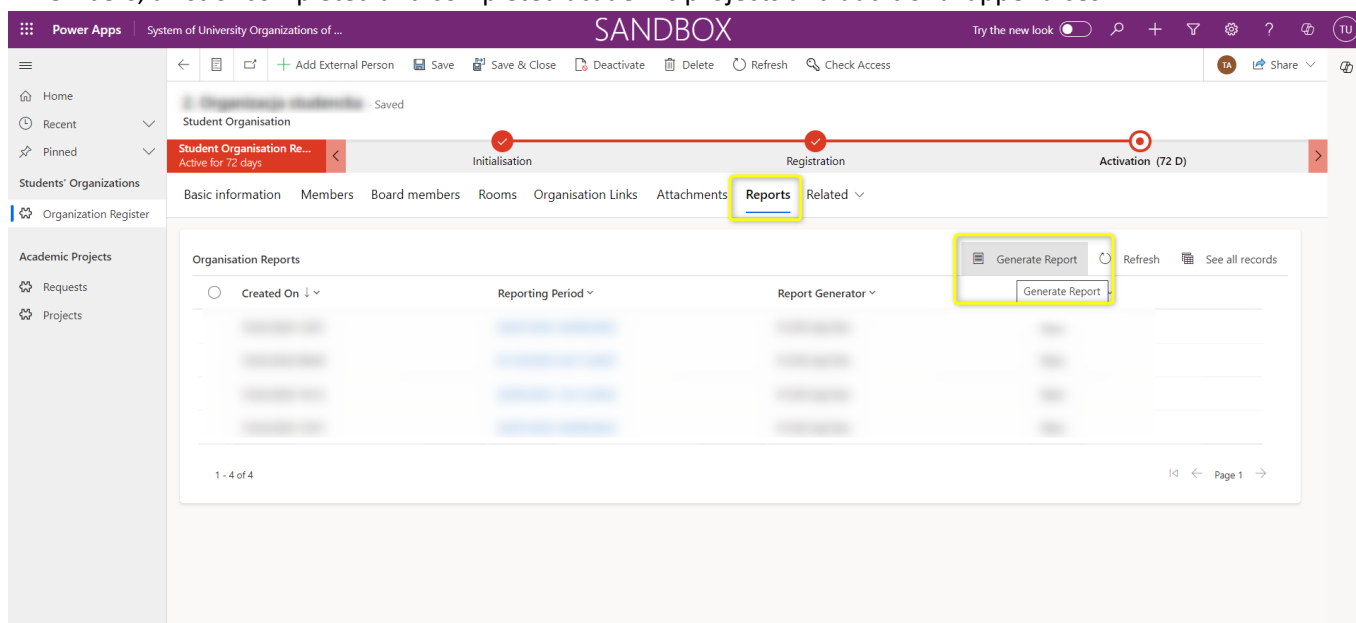
Figure 22 Reports section
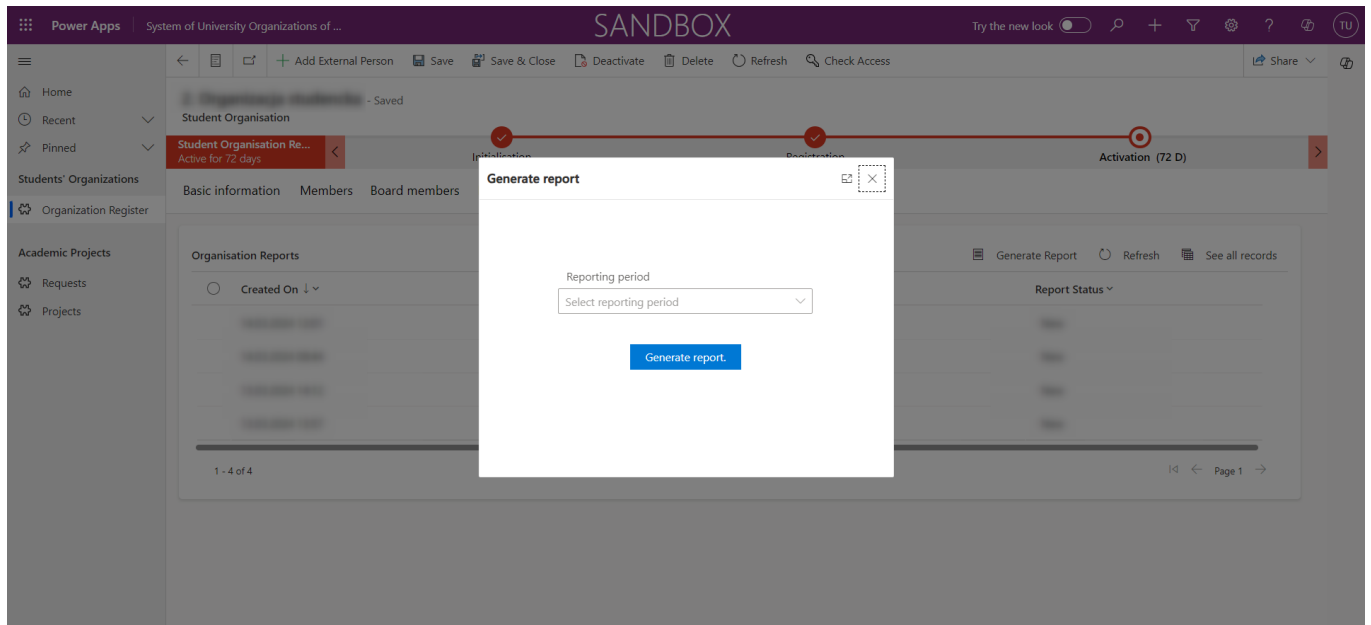
Figure 23 Reporting period

Moving to the details of the report is possible by double-clicking on the selected record or by marking the checkbox of the record and then selecting the *Edit* button. Deleting a report is done by marking the checkbox of the record and then selecting the *Delete* button.

Report management includes indicating the current status of the report, adding or deleting attachments and generating the report into a PDF report to be displayed in the *Documents* table. When the status of a report changes to *Accepted, Accepted with comments* or *Rejected,* an email notification is sent to all board members and the organisation's supervisor.

Figure 24 Attachments and PDF report

6 Module - Submission and Implementation of an Academic Project

The module supports the Academic Project Submission (APR) process by completing the submission form and going through the approval process through the various roles.

The persons entitled by default to submit academic projects are the members of the Board of Directors of the UOS concerned, who can identify from the members of the organisation the coordinators who will be given access to the System and the registers below.

6.1 Register of Applications and Academic Projects

The register can be accessed from the *Academic Projects* side panel, then *Submissions* and *Projects*.

Authorised SGH staff according to their assigned roles and permissions resulting from the approval process, with the exception of the UOS Supervisor, have access to view all submissions and academic projects.

Supervisors and members of the Boards of the UOS and elected coordinators have a view of the register limited only to the list of project applications of the organisations to which they belong.

The basic information of an Academic Project Submission consists of the following: Submission *Number, Name, Name (Student Organisation), Academic Project Submission Status,* for a project these are: *Submission Number, Name, Student Organisation, Academic Project Submission Status*

Figure 25 Register by example of academic projects

The user has the following views available:

- *Active Academic Submissions/Active Academic Projects -* sorted by name in ascending order by default
In each of the views, the user has an available button to export the displayed list of records to an Excel file - selected when the checkbox is marked or the full list if the records are not marked.

Figure 26 Exporting a list of records

6.2 Academic Project Request

The application can be processed through three main verification and acceptance paths:

1. Created by the Student Government requires only the review of the Executive Member, the Chair of the Student Government, the Vice-Rector and the Chancellor.
2. Established by an organisation other than the Student Government and requiring funding, it goes through a full verification and evaluation path, i.e.: verification by the Board Member and Supervisor, evaluation by the Delegates, evaluation by the Council of Union and Organisations, verification by the Chair of the Student Government, the Vice-Rector, the Chancellor.
3. Created by an organisation other than the Student Council and not requiring funding, it goes through the vetting of a Board Member and the Supervisor.

When a APR changes its status and is awaiting an action from a person with the given permission, a notification is sent to all persons with the given role. In the case of the Board Member and the Supervisor, these are the persons designated within the notifying organisation, whereas if the APR is awaiting approval from the selected entity then all assigned persons receive the notification.

Sending an email notification to the user's address to:

- Member of the Management Board - when the APR is awaiting the approval of the Member of the Management Board
- Supervisor - when the APR is awaiting verification of the Supervisor
- Delegate - when the APR is awaiting the Delegate's assessment
- Person with RKiO authorisation - while the APR is awaiting RKiO assessment
- Chairperson of the Student Council - when the APR is awaiting the verification of the Chairperson of the Student Council
- Vice-Rector - while the APR is awaiting the Vice-Rector's verification
- Chancellor - while the APR awaits the Chancellor's verification
- Requestor - Board Member or Coordinator (if any) when the APR goes to the requestor for correction

6.2.1 Creation of an Academic Project Application

An Academic Project submission can only be created by a member of the Board of the UOS concerned. If a person serves on the Board of more than one organisation, he/she must indicate the Organisation under which the submission is created. Once an organisation is assigned, once the UOS has been created it cannot be changed.

A new APR is created by selecting the 'New' button, which opens a form allowing the necessary declaration data to be entered.
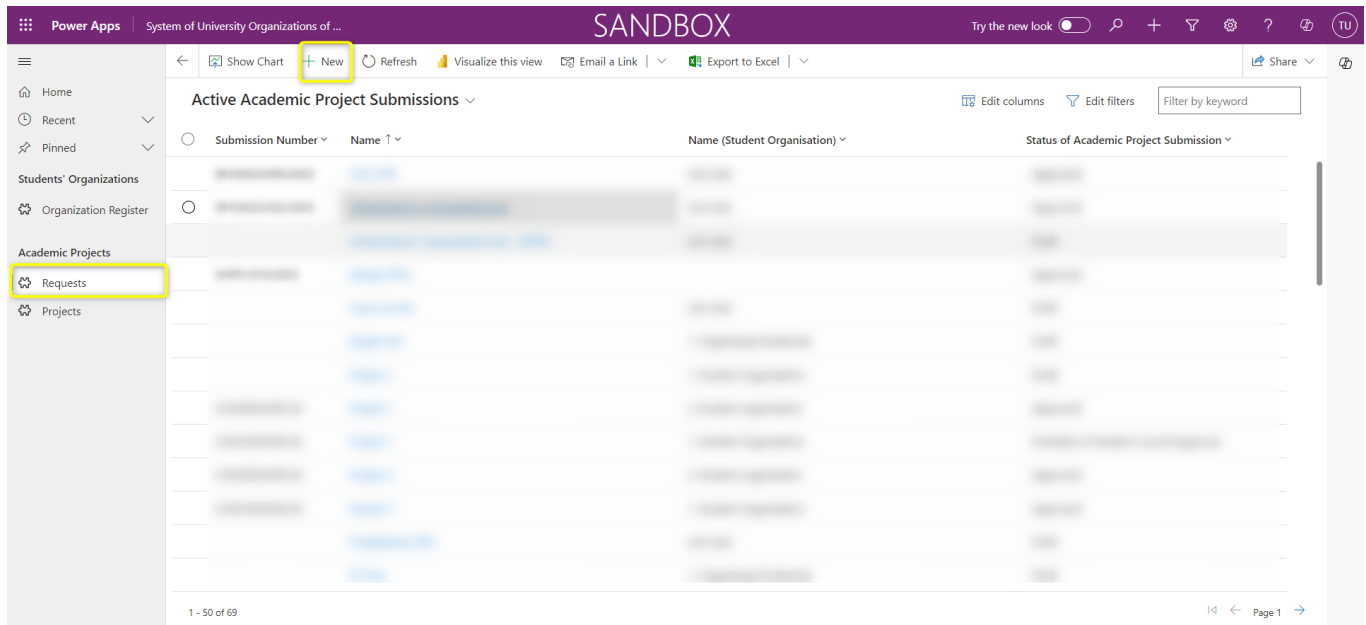
Figure 27 Creation of a new request
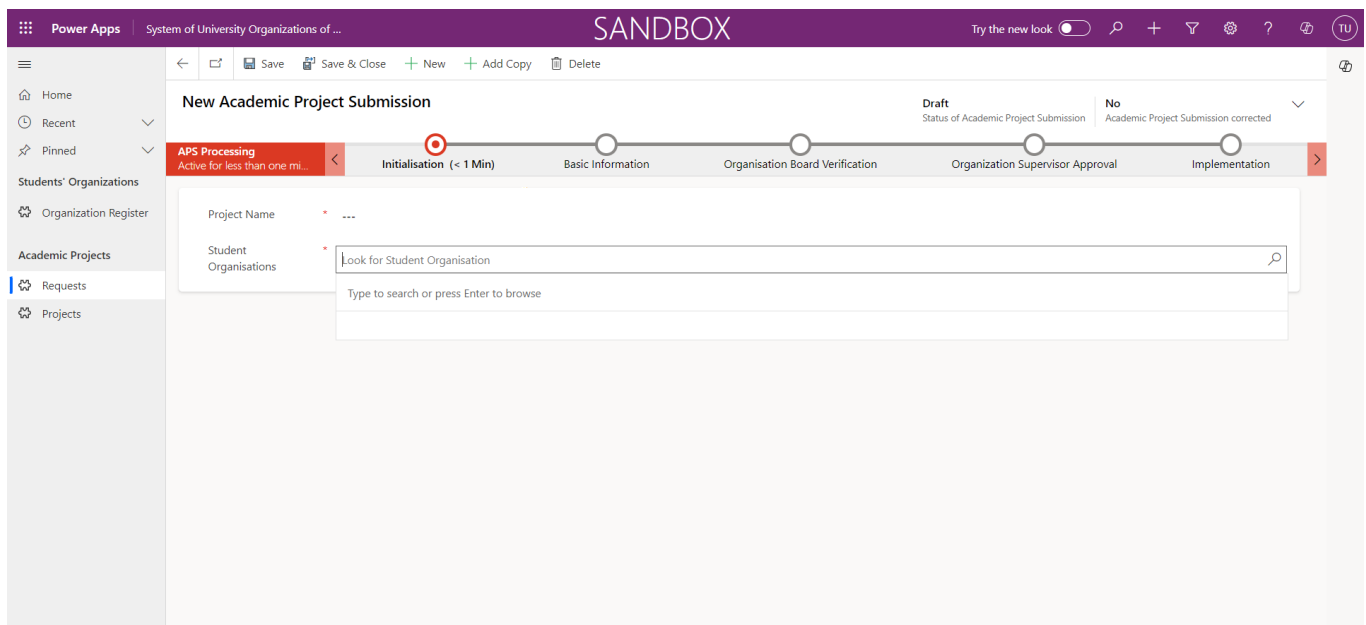
Figure 28 Indication of the organisation submitting the project

The first step of the application is to initiate it, i.e. to name the application and to indicate the organisation. As long as the approval process has not started, the APR remains in Working status. To proceed to the stage of completing the basic information, click on the icon above the stage name and then click on the *Next stage* button.
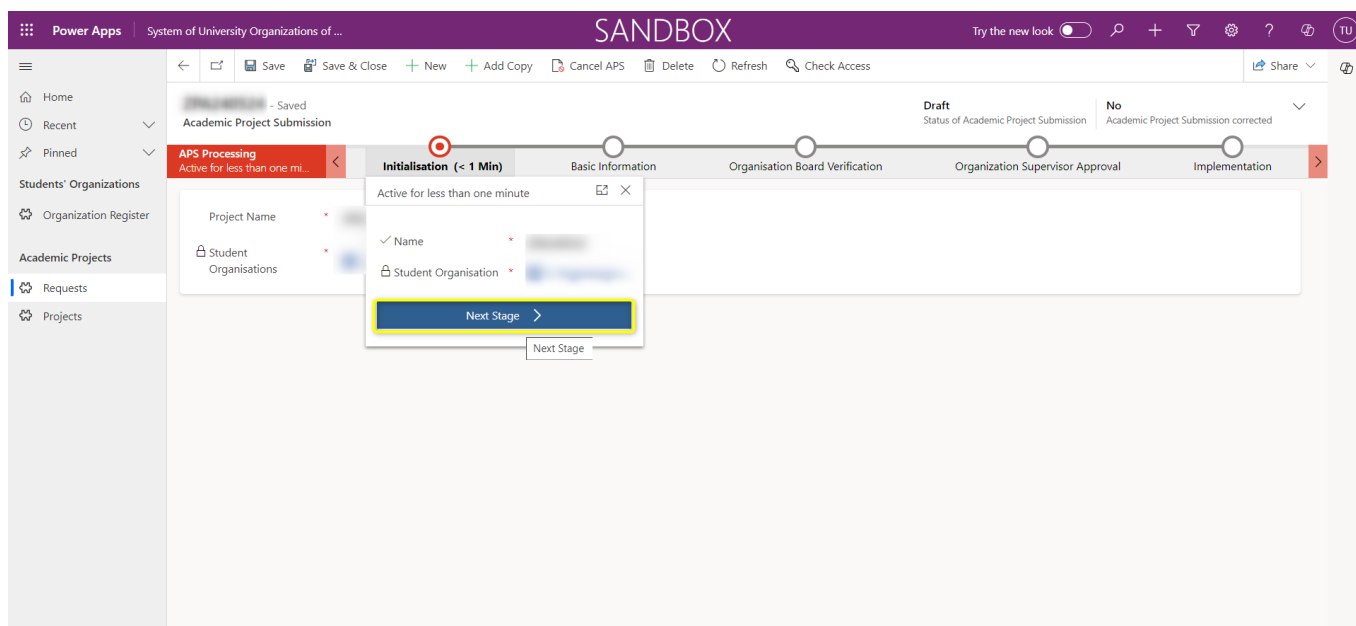
Figure 29 Moving to the Basic Information stage

The *Basic Information* consists of the *Name,* the name of the organisation, the question concerning the website, where, after indicating *Yes,* a text field for completing the link will appear, the question concerning funding from the FRS, where, after indicating *Yes, a* text field for completing the amount of funding will appear, and the obligatory indication of the *Project Type*.
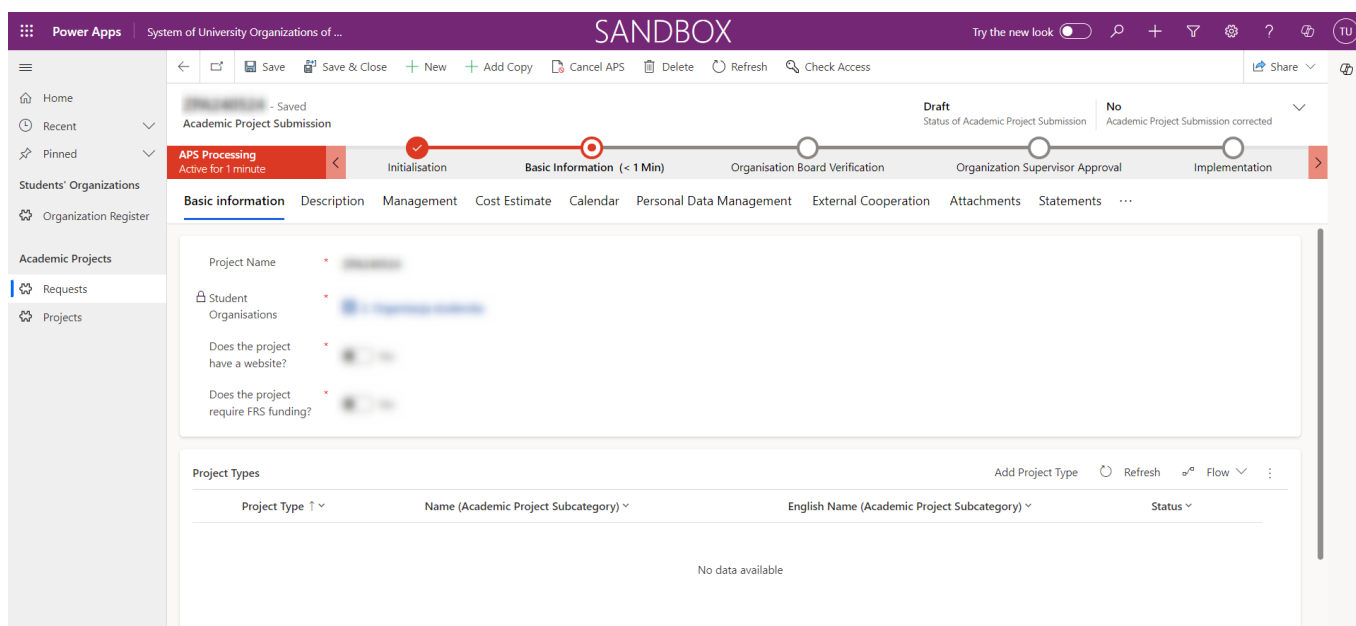
Figure 30 Basic information

A compulsory section to be completed is the *Description,* which consists of the *Main Objective, Target Group, Reach and Planned Number of Project Participants, Project Language, Project Tangible Benefits, Location*.

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Figure 31 Request description

In the *Management* section, the applicant can optionally designate a Coordinator and/or an Accountability Officer from among the members of the organisation, excluding associate members. The designated Coordinator is given the full possibility to edit the application, without the possibility to change the stage of the application, i.e. to go to the *Verification* stage of the Board Member, unless the Coordinator is also a Board Member. The Accountable Officer, will fulfil their role in the project process.

Figure 32 Management section

Projects that require FRS funding, in the Basic *Information* section, must mark *Does the project require FRS funding?* to Yes and then enter the amount of funding requested and a cost estimate.

Figure 33 Funding from the FRS

To add a preliminary cost estimate in a submission, it must first be created as a new record and then indicated from the drop-down list.

After entering the name of the initial cost estimate and saving the change, the details i.e. *Revenue Source, Costs* and summary information in *Balance* will be displayed. By indicating the *New entity* button, the submitter is redirected to a selection of dictionary values. For *Sources of income,* only the amount is included, while for *Costs,* the notifier has the option to fill in the full amount and details. After entering the data, save the cost estimate.

Figure 34 Creation of a preliminary cost estimate
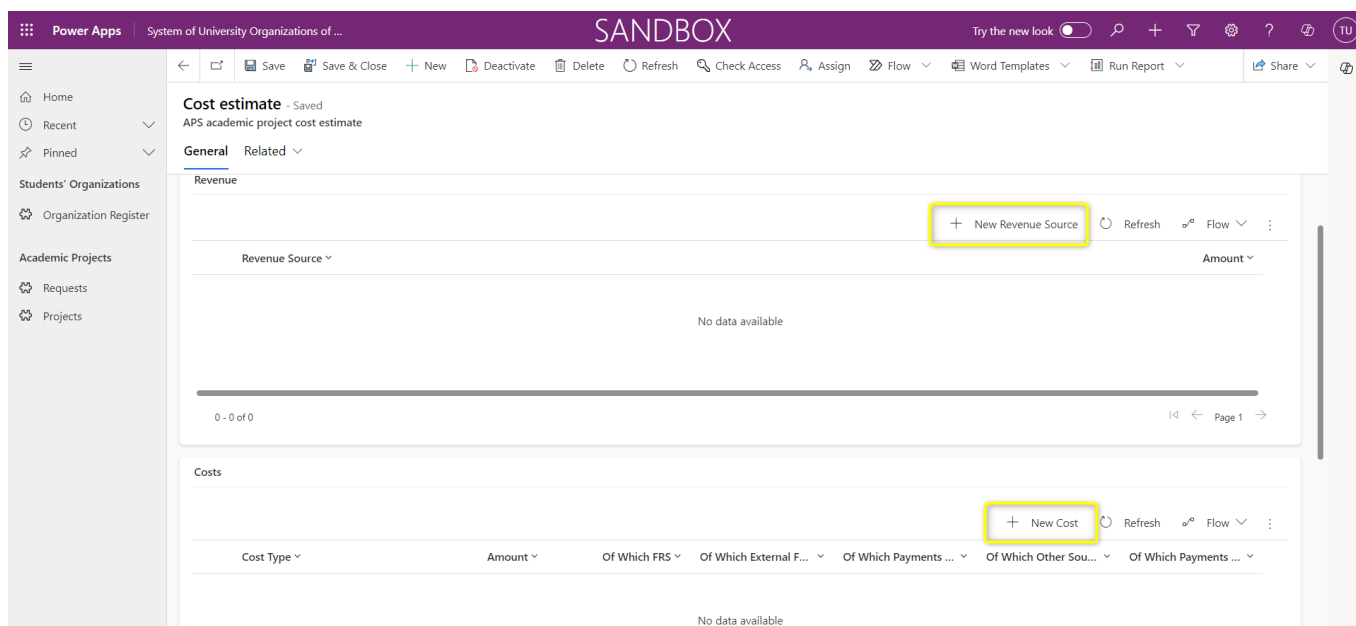
Figure 35 Adding a source of revenue and costs
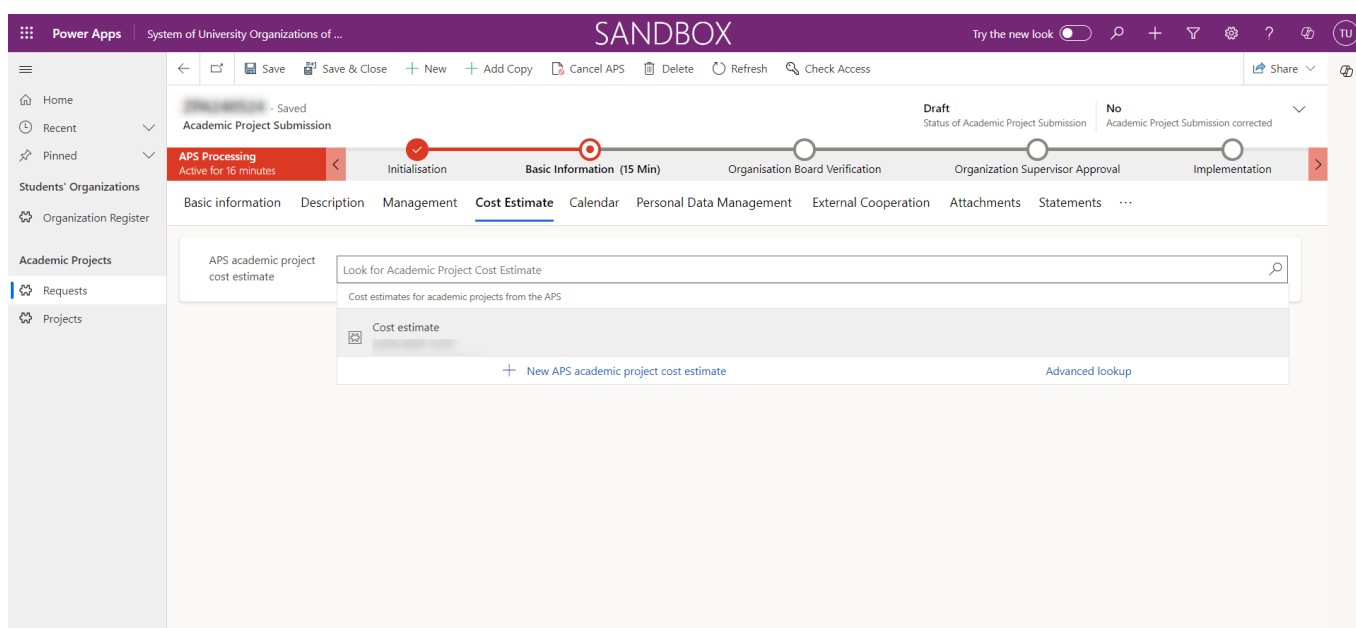
Figure 36 Selecting a preliminary cost estimate

In the *Calendar, Personal Data Management, External Cooperation, Attachments, Transmission and recording , Infrastructure and Equipment* sections*,* the notifier and optionally the Coordinator, if appointed, fills in the details.

In the *Calendar* tab, it is compulsory to add at least one event and to specify the planned start and end date of the project.

Figure 37 Calendar section

In the *Personal Data Management* section*,* additional information on the processing of personal data is displayed when you mark the answer *Yes:* **Note - *The Data Protection Team (kodo@sgh.waw.pl) should be consulted before proceeding.***

Figure 38 Personal data section

By default*,* all options in the *External Collaboration, Transmission and recording* and *Infrastructure and Equipment* sections are marked *No*. When the button is changed to *Yes, a* table is displayed to which the user can add new data. If a field is marked as *Yes*, it requires detailed information to be entered in a table. The tables are populated with information from a prepared dictionary, if there is a need to add a value other than those available in the list, please contact the DOS Administrator.

Figure 39 External Cooperation section

Figure 40 Transmission and recording section

Figure 41 Infrastructure and equipment section

The Attachments section contains an entry for entering the cost estimate as an attachment, its name and description. The system also allows you to add other attachments that are useful in the Academic Project Submission process.

Figure 42 Attachments to the request

In the *Declarations* section, you will find information with which the applicant must familiarise himself/herself. Reading and ticking the checkbox next to the entries is required to refer the application, to the next stage.

Figure 43 Statements

The Other section contains information on awards and comments from those reviewing the application. A comment is required to be entered if the APR is cancelled or rejected - the field is variable depending on the stage of processing of the application.
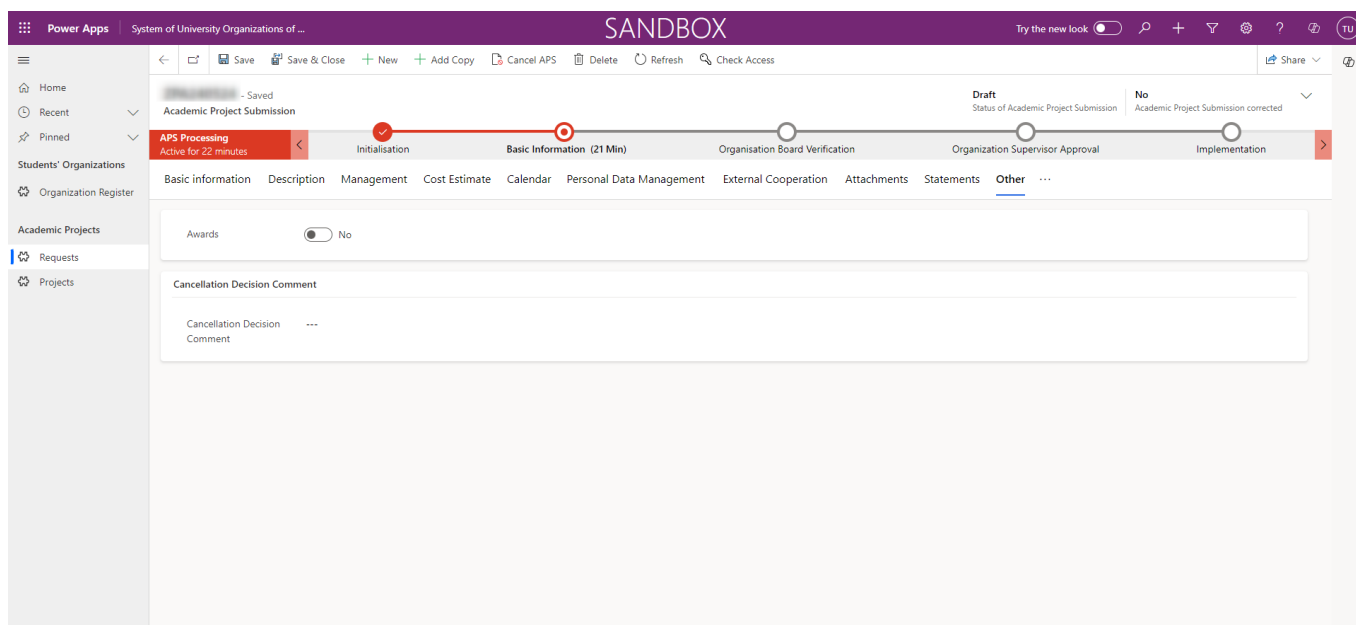
Figure 44 Other - comments section

Removal of APR

On the *Basic Information* tab, users with access to the APR (Board member, coordinator) in *Working* status have the option to delete the APR. The deletion takes place by selecting the *Delete* button. The notification is deleted irretrievably.
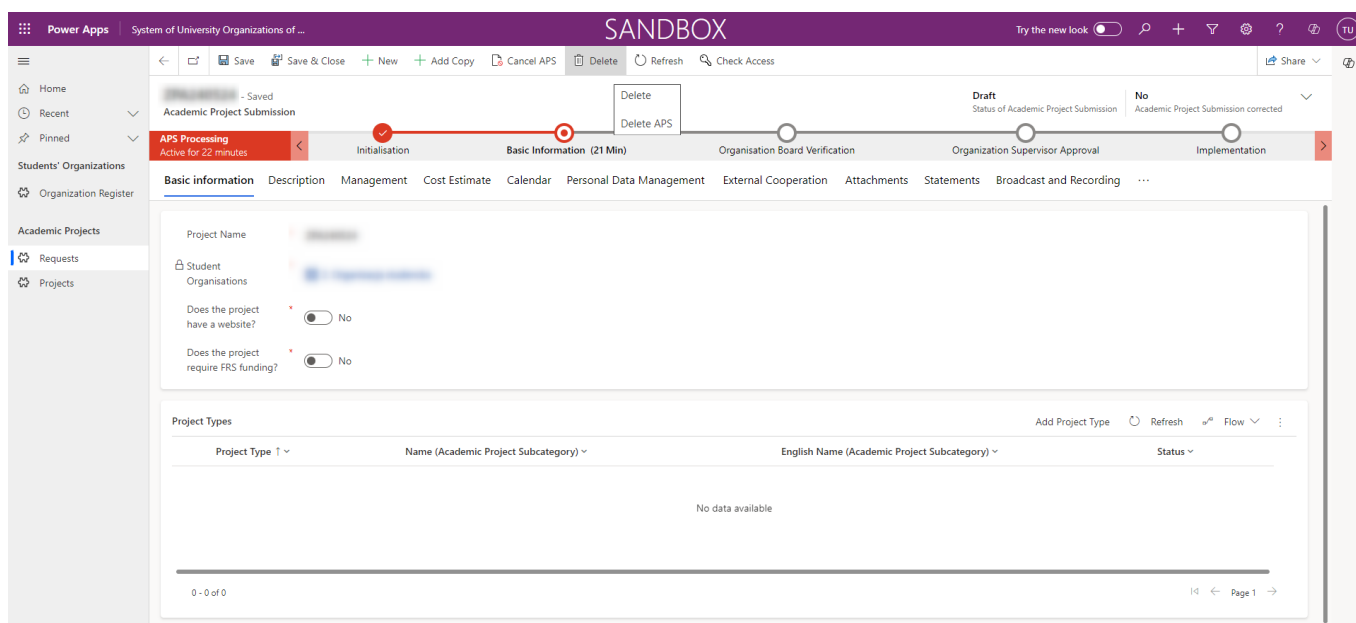
Figure 45 Deletion of APR

6.2.2   Verification stage of the Organisation's Management Board

Once the required information on the project to be submitted has been completed, the first, and common to all paths, acceptance stage is *Organisation Board Verification*. This is followed by the transition of the APR from the status *Working* to the status *In the process of acceptance,* which creates a submission number.

To accept the APR, after verifying the details of the application description, indicate the *Next Step* button available in the application process bar.

Figure 46 Acceptance of the APR by a Board Member
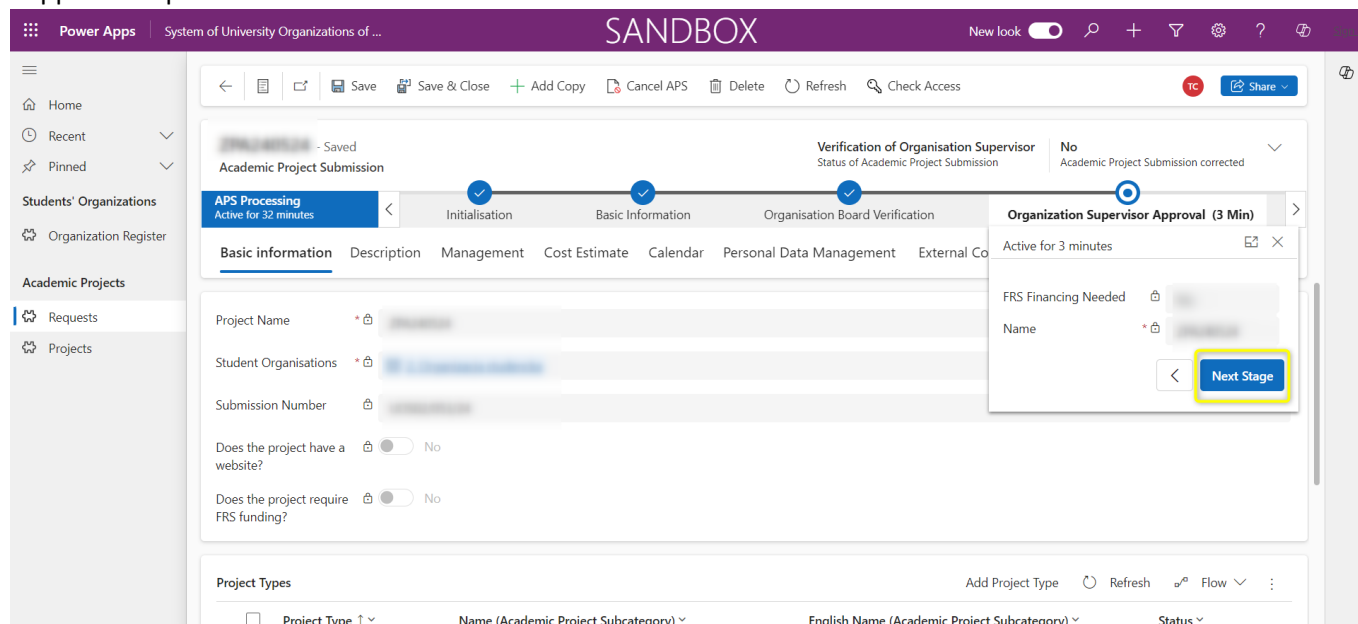
If the submission does not pass verification, the Board Member has the option to reject the APR and to withdraw it to the basic information stage. If the submission is withdrawn for correction, enter a comment with the details of the decision in the *Other* section, then from the process bar select the stage that the user with the selected role sets as active. The withdrawn submission obtains in the upper right corner of the interface information about the creation of the correction sent to the applicant.

Figure 47 Rejection of the APR by a Board Member

6.2.3 Approval of the Organisation Supervisor

This stage only applies to projects that are submitted by organisations other than the Student Council.
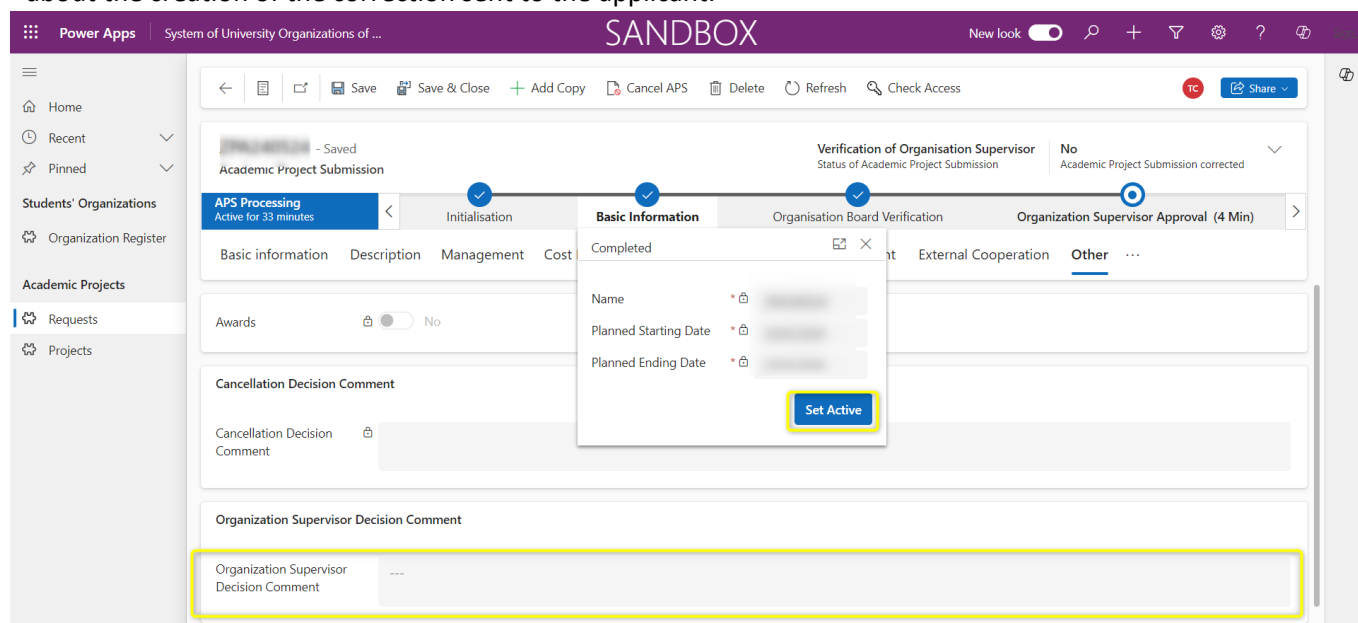
The supervisor at this stage can either accept or reject the request for correction of the applicant. To accept the APR, after verifying the details of the application description, indicate the *Next Step* button available in the application process bar.

Figure 48 Acceptance of the APR by the Supervisor

If the submission does not pass verification, the Supervisor has the option to reject the APR and to withdraw it to the Basic Information stage. If the submission is withdrawn for correction, enter a comment with the details of the decision in the *Other* section, then from the process bar select the stage that the user with the selected role sets as active. The withdrawn submission obtains in the upper right corner of the interface information about the creation of the correction sent to the applicant.

Figure 49 Rejection of the APR by the Supervisor

6.2.4 Evaluation by the Delegates

If a project submission requires funding from the FRS and is submitted by an organisation other than the Student *Council*, during the verification process, students with the *Council of Union and Organisations (COCO)* role indicate a delegate in the *Delegate* section. The section is visible after the project submission has been marked as requiring funding and has progressed to the verification stage. A delegate can be a person who does not have the role of Delegate in the UOS creating the submission. Additionally, *the Council of Union and Organisations (COC)* has access to a dedicated *Active Delegates* view. Students who are delegates are tagged in the selected student organisations (UOS module).

Note - Delegates must be nominated by the organisations concerned from the University Student Organisation Management module.
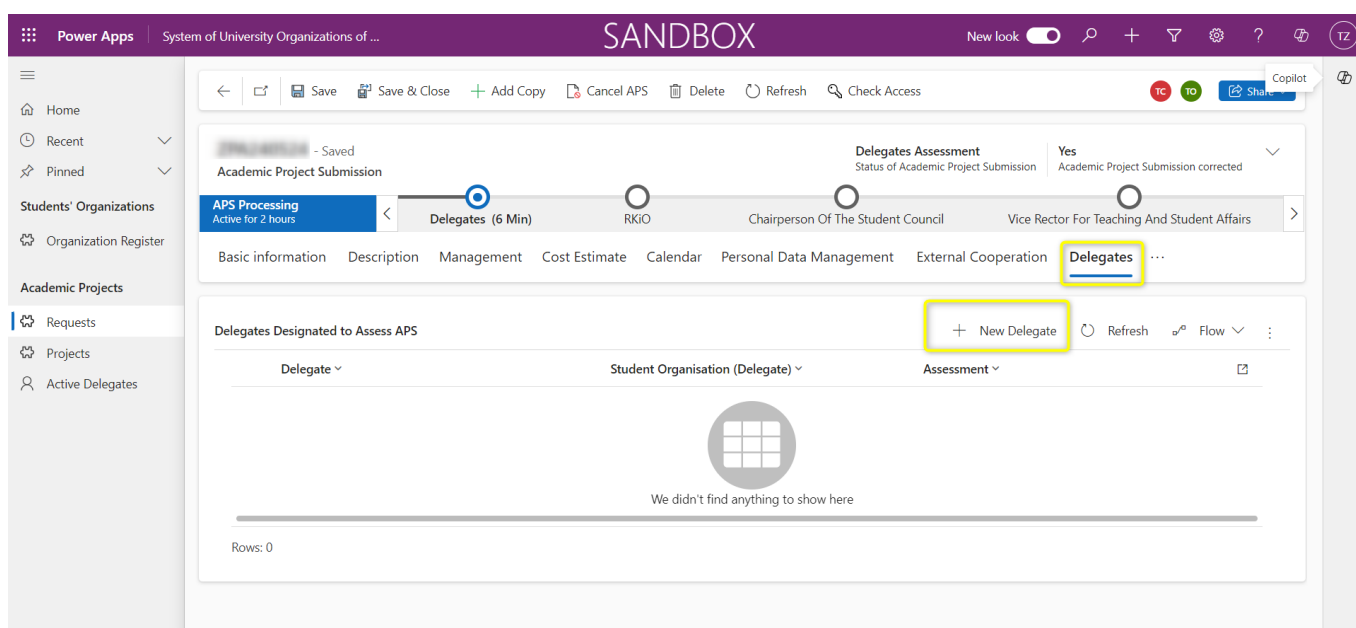
Figure 50 Delegates section
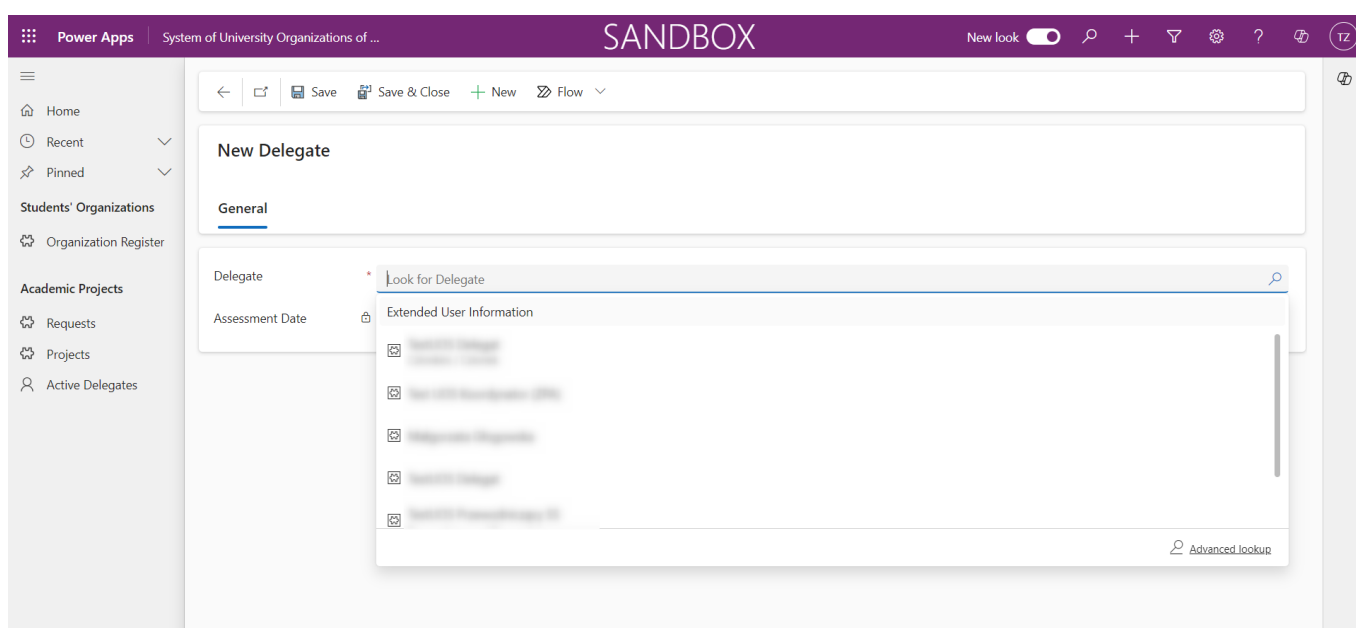
Figure 51 Indicating a Delegate from the list
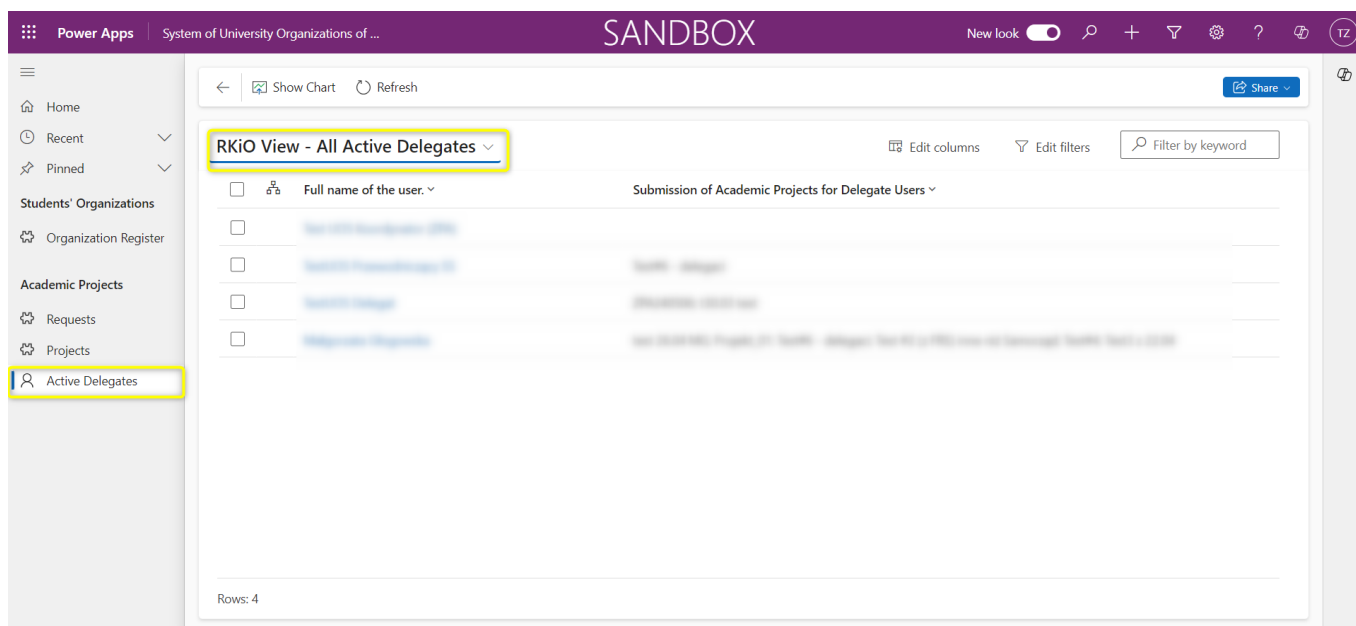
Figure 52 Active Delegates

The assigned Delegate completes his/her assessment on the *Delegates* tab by indicating the row to which he/she is assigned and then selecting *Edit*. In the view displayed, once the assessment has been entered in the text field, the date the assessment was added is automatically completed. When the *Save and Close* button is selected, the assessment is added to the submission.
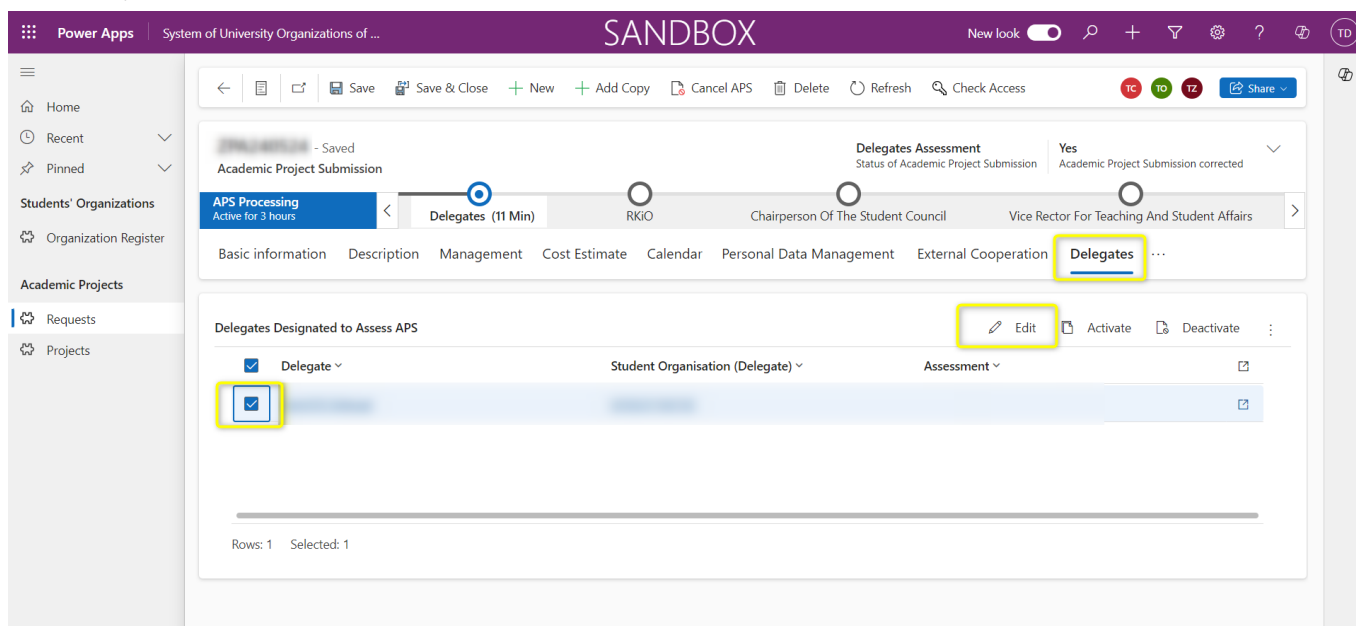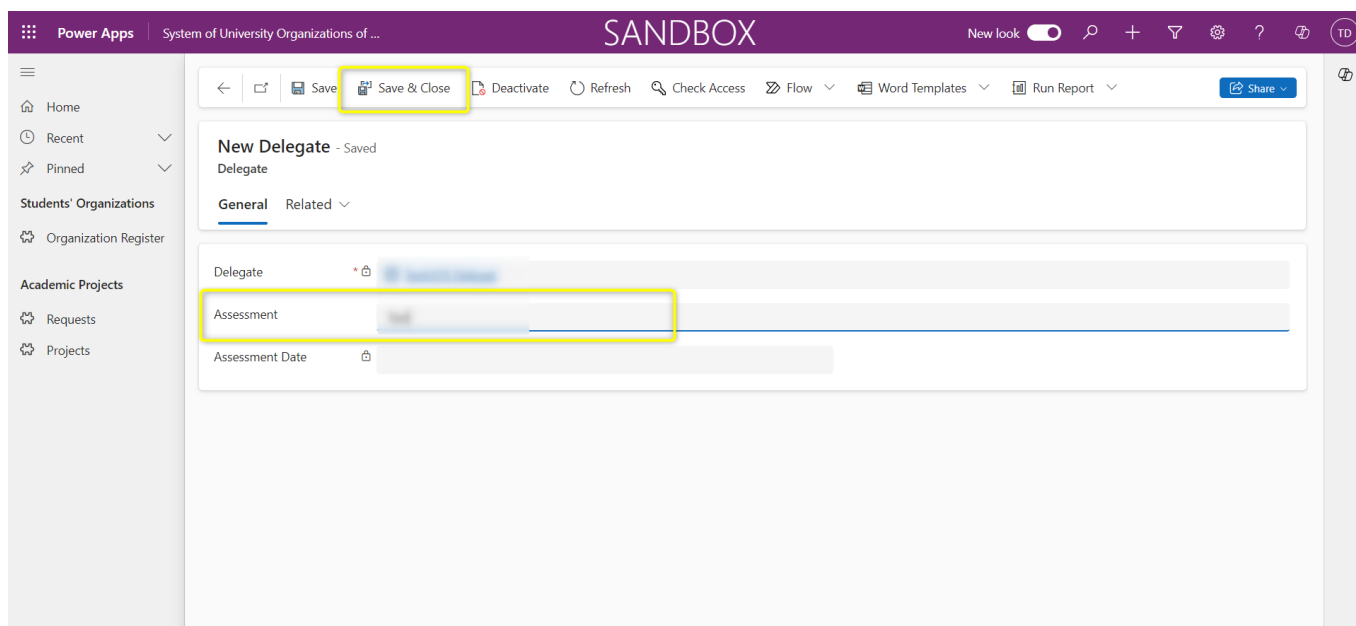

Figure 53 Delegate evaluation

Figure 54 Saving the Delegate's assessment

Once the assessment has been added, the Delegate passes the application to the next stage.
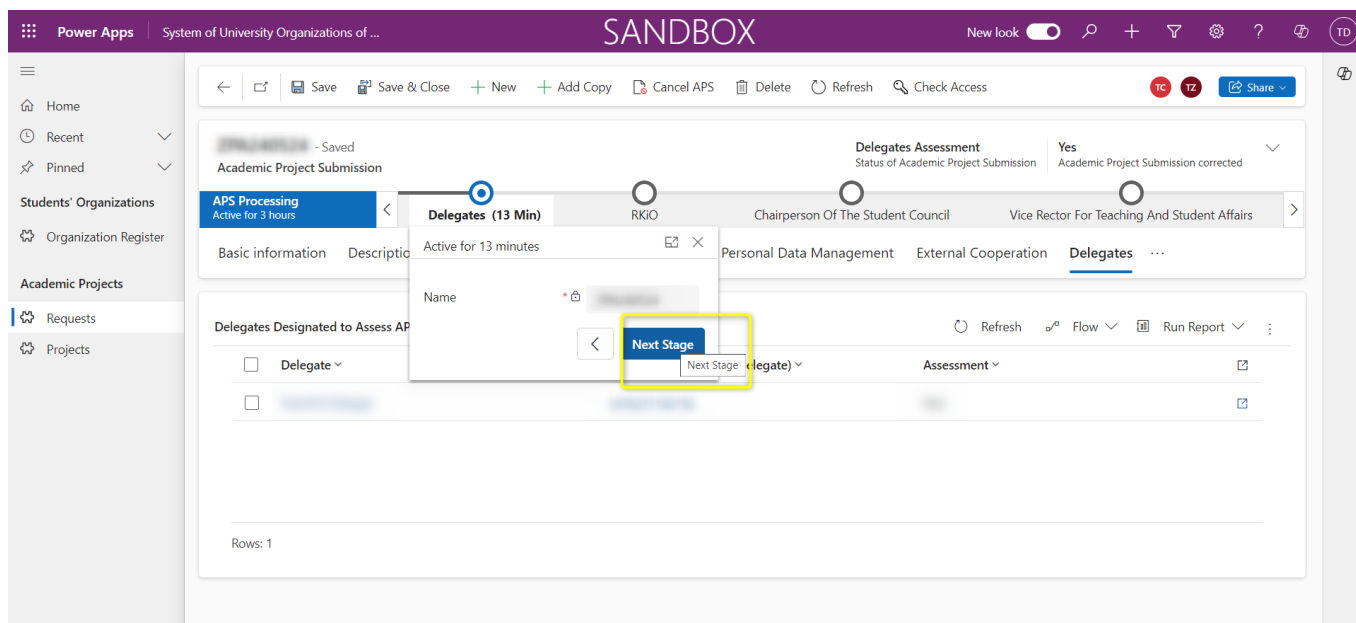
Figure 55 Moving on to the next stage after the Delegate's assessment

6.2.5   Evaluation by the RKiO

This stage only applies to projects that are submitted by organisations other than the Student Council and are funded by the FRS.

The Council of Union and Organisations at this stage can either accept or reject the application for the applicant's adjustment. To accept the APR, after verifying the details of the application description, enter a value into the *Allocated Funding Limit* field in the *Basic Information* and then indicate the *Next Step* button available in the application process bar.

Figure 56 Completion of FRS allocation information

If the submission does not pass verification, the RKiO has the option to reject the APR and to withdraw it to the basic information stage. If the submission is withdrawn for correction, enter a comment with the details of the decision in the *Other* section, then select the stage from the process bar, which the user with the selected role sets as active. The withdrawn submission obtains in the upper right corner of the interface information about the creation of the correction sent to the applicant.

Figure 57 Rejection of APR by RKiO

6.2.6   Verification by the Chairperson of the Student Council

This stage only applies to projects that are submitted by all organisations and if they are funded by the FRS in the case of projects submitted by organisations other than the Student Council.

The Chair of the Student Council at this stage can either accept or reject the application for correction of the applicant. To accept the APR, after verifying the details of the application description, indicate the *Next Step* button available in the application process bar.

In the Application, it is also possible to collectively accept submissions by selecting them in the main register (check mark) and then clicking the dynamic button that appears on the top bar *Accept submissions.*
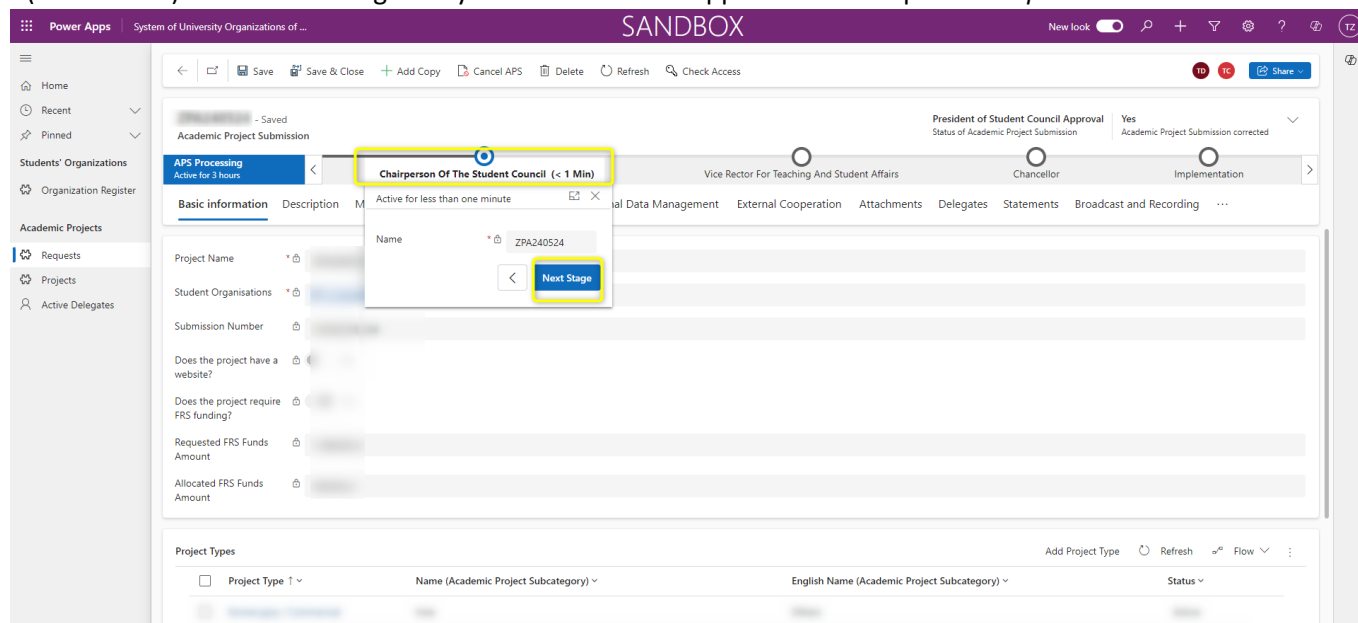

Figure 63 Approval of the APR by the Chairperson of the Student Council

If the application does not pass the verification, the Chair of the Student Council has the option to reject the APR and to withdraw it to the basic information stage (correction of the applicant) or the RAC assessment stage. If the submission is withdrawn for correction, a comment must be entered with the details of the decision in the *Other* section, then a stage must be selected from the process bar, which the user with the selected role sets as active. The withdrawn submission gets an indication in the upper right corner of the interface that a correction has been created sent to the applicant.
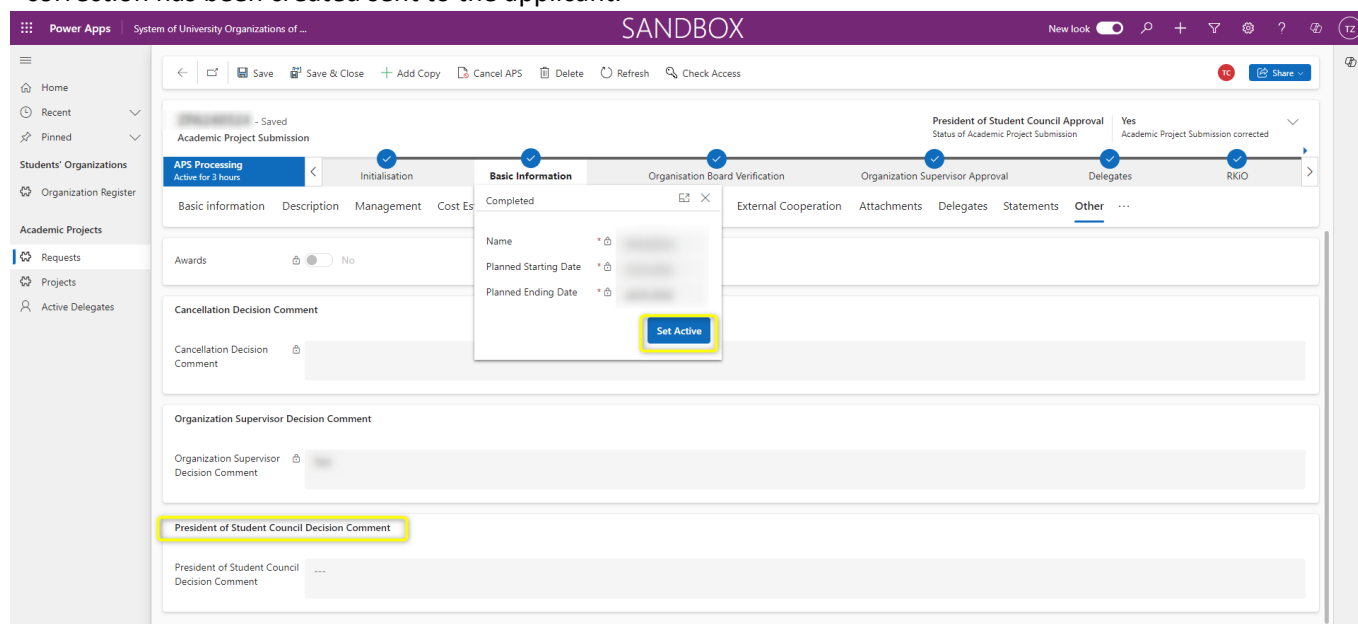
Figure 58 Rejection of the APR by the Chairperson of the Student Council

6.2.7   Verification by the Vice-Rector

This stage only applies to projects that are submitted by all organisations and if they are funded by the FRS in

the case of projects submitted by organisations other than the Student Council.

The Vice-Rector at this stage can either accept or reject the submission for the applicant's correction. To accept the APR, after verifying the details of the application description, indicate the *Next Step* button available in the application process bar.

In the Application, it is also possible to collectively accept submissions by selecting them in the main register (check mark) and then clicking the dynamic button that appears on the top bar *Accept submissions.*
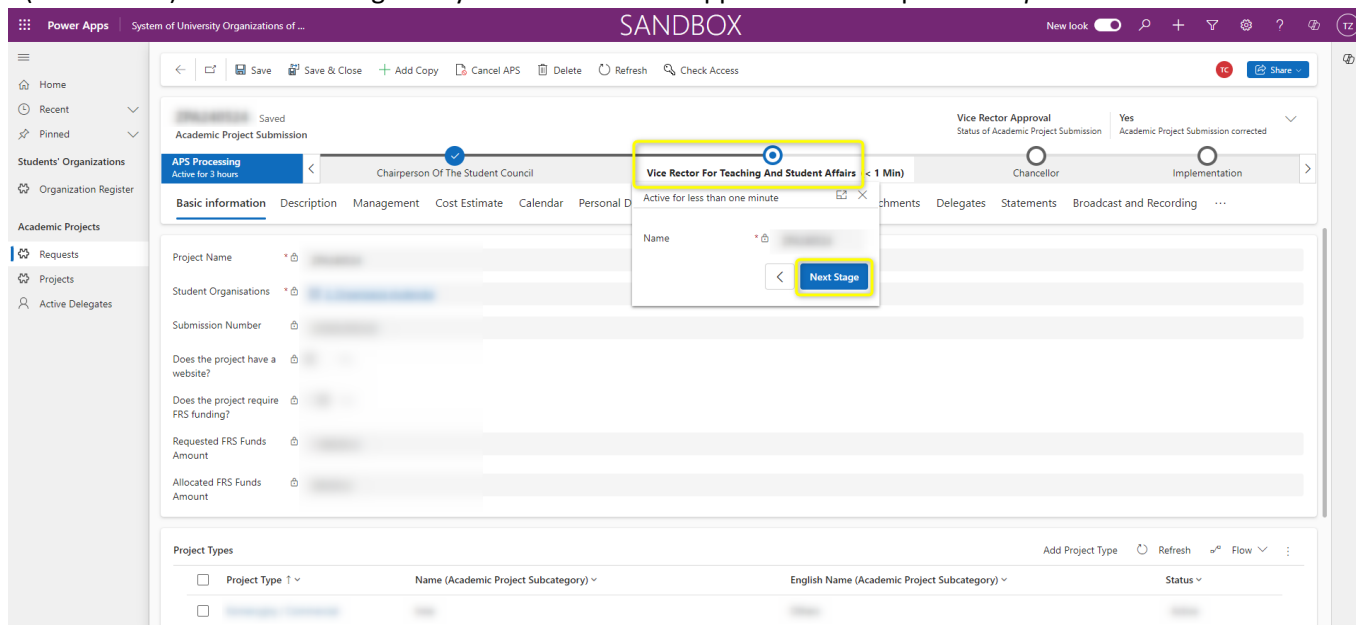
Figure 59 Approval of the APR by the Vice-Rector
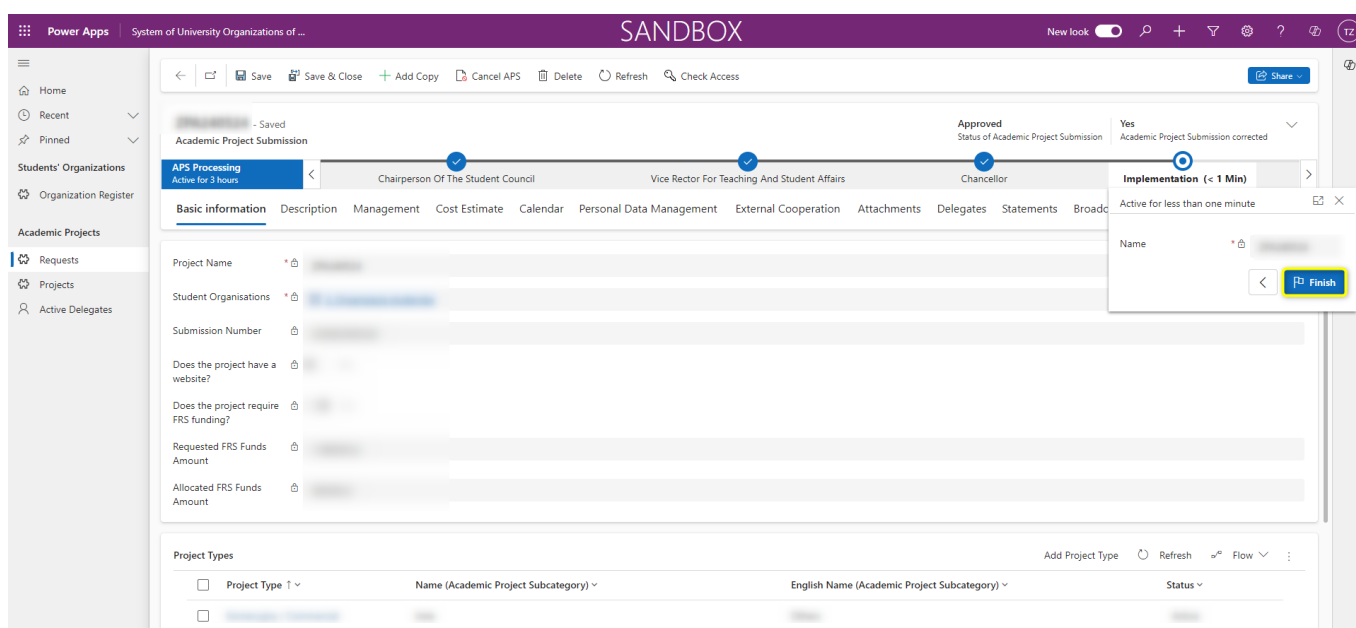
If the submission does not pass verification, the Pro-Vice-Rector has the option of rejecting the APR and withdrawing it to the Basic Information stage (correction of the applicant) or the RAC assessment stage. If the submission is withdrawn for correction, a comment must be entered with the details of the decision in the *Other* section, then a stage must be selected from the process bar, which the user with the selected role sets as active. The withdrawn submission gets an indication in the upper right corner of the interface that a correction has been created sent to the applicant.

Figure 60 Rejection of APR by the Vice-Rector

6.2.8   Verification by the Chancellor

This stage only applies to projects that are submitted by all organisations and if they are funded by the FRS in the case of projects submitted by organisations other than the Student Council.

The Chancellor at this stage can either accept or reject the submission for the applicant's correction. To accept the APR, after verifying the details of the application description, indicate the *Next step* button available in the application process bar and in the *Realisation step the Completed* button. The last step is very important in terms of the processing of the submission, because at this point the financial assessment of the APR is completed and the project is created, and the user is not able to change the status of the submission.

In the Application, it is also possible to collectively accept submissions by selecting them in the main register (check mark) and then clicking the dynamic button that appears on the top bar *Accept submissions.*
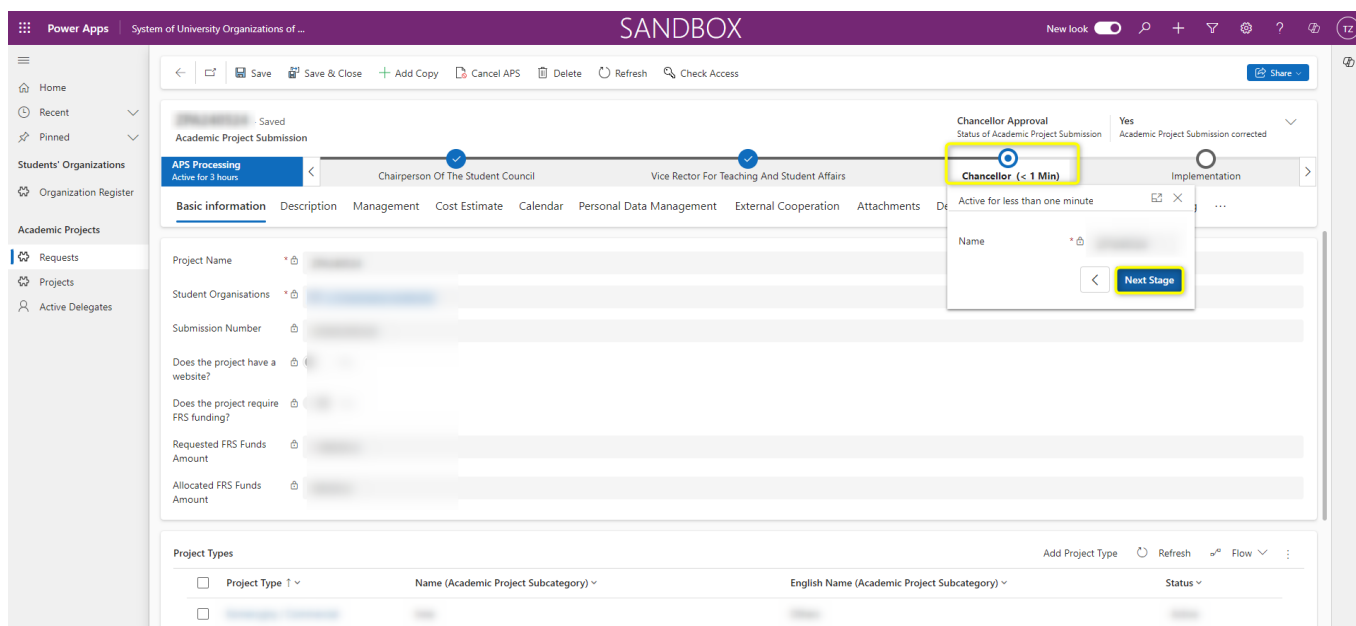
Figure 61 Acceptance by the Chancellor

Figure 62 Completion of request processing

If the submission does not pass verification, the Chancellor has the option of rejecting the APR and withdrawing it to the Basic Information stage (correction of the applicant) or the RAC assessment stage. If a submission is withdrawn for correction, a comment must be entered with the details of the decision in the *Other* section, then a stage must be selected from the process bar, which the user with the selected role sets as active. The withdrawn submission gets an indication in the upper right corner of the interface that a correction has been created sent to the applicant.

6.2.9   Creation of a copy of the request

Submitters have the option of creating a copy of the APR based on an existing submission. The functionality is available from the level of details of the copied submission.

Figure 63 Creation of a copy of the request

6.2.10 Cancellation of request

The Board Member, the Coordinator and the Supervisor can cancel the application at any time during the processing of the application as long as it is not in *Working* or *Accepted* status. In this case, complete the comment in the *Other* section and then select the *Cancel APR* button. The submission changes its status to Cancelled. A Cancelled APR is not subject to the further acceptance process and does not create a project.
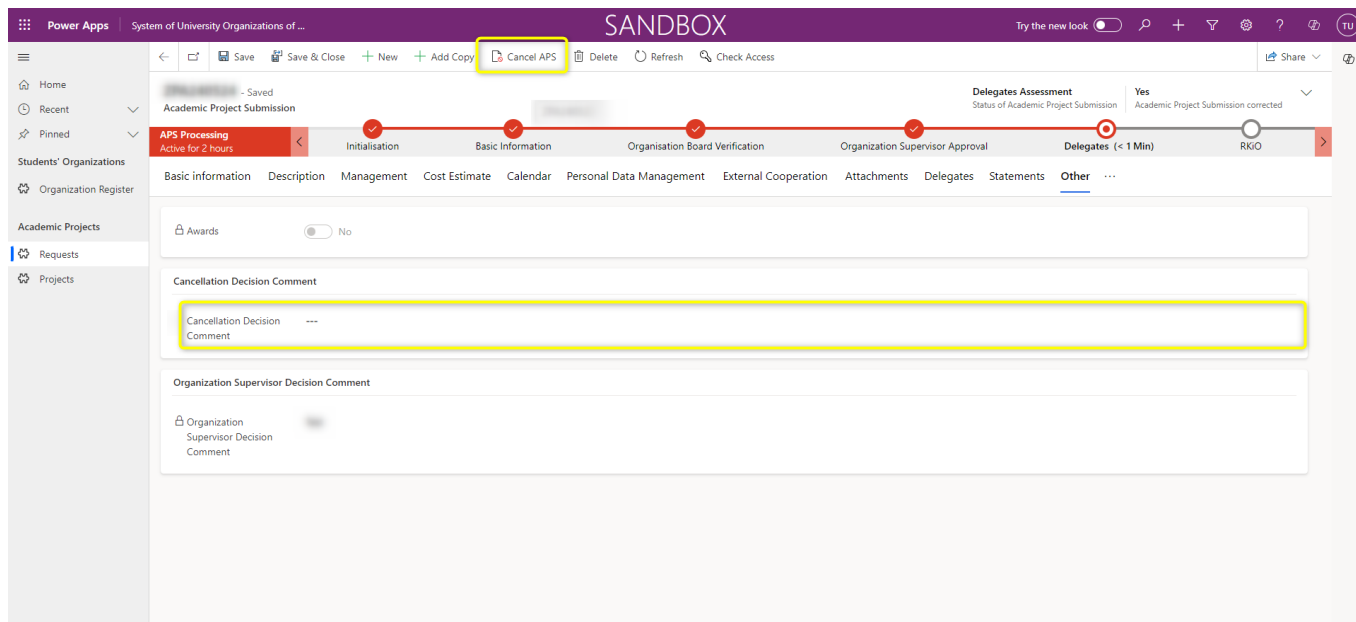
Figure 64 Cancellation of APR
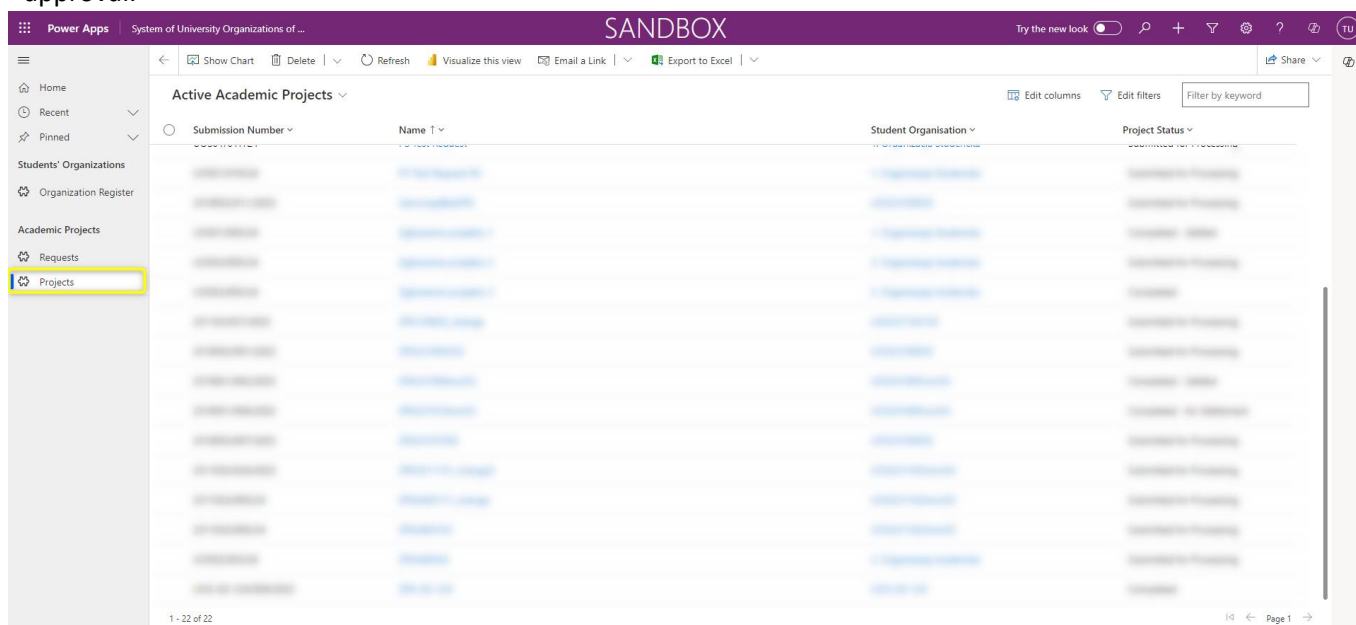
6.3   Project Academic and its implementation

An academic project can be taken through the following stages of implementation:

1. Targeted for implementation - initial stage.
2. In progress - indicates that the project has started; a project can be referred to this stage by a Board Member, Supervisor or Coordinator.
3. Completed - to be cleared - intermediate stage for projects with FRS funding referred by a Board Member, Supervisor or Coordinator.
4. Completed - Cleared - final status for projects with FRS funding set by the Finance and Account Unit.
5. Completed - final status set by the Board Member, Supervisor or Coordinator for projects without FRS funding.

Projects with FRS funding have an additional verification i.e. in order to refer the project for clearance and to complete it, they must not have active events.

After the application has passed through all the stages and the APR has been accepted for execution by the system, a new project is created automatically in *Projects,* with the status Notified *for execution*. All data entered by the applicant are transferred to the project information ,. The only exception is the project cost estimate, to which only the revenue item *Payments of participants settled outside SGH (e.g. conferences, trainings)* is transferred, for which costs settled outside SGH can be indicated. Transferred items require approval.

Figure 65 Creation of an academic project
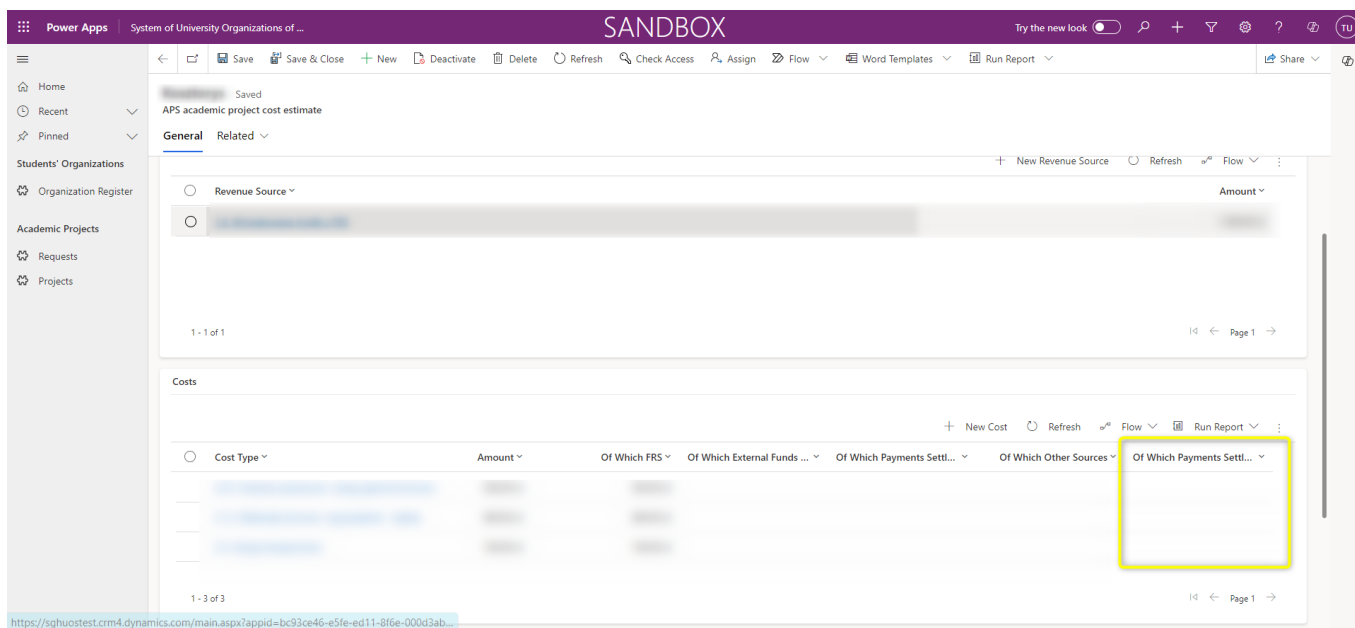
Figure 66 Costs billed outside SGH

6.3.1 Change of project data

At the *Submitted for Implementation* stage, students with the role of *Board Member* and optionally *Coordinator* and the person responsible for billing (only for the change in the Revenue and Expenses outside MTS tab) can create a change request.

The creation of a change request saves it in a separate *Change Requests* tab and sends a notification to the Outlook inbox and the Teams app to those accepting the change. In order for a change to be entered into the project data, the change request must then be accepted depending on the area of change to which it relates.

The approval of one person from the role is required. Once the entire approval pathway has been passed e.g. Board Member → Supervisor UOS → Pro-Vice-Rector, the change request changes status to Accepted. The change is entered into the project. When rejecting a request, the person who performs this action can enter an optional comment.
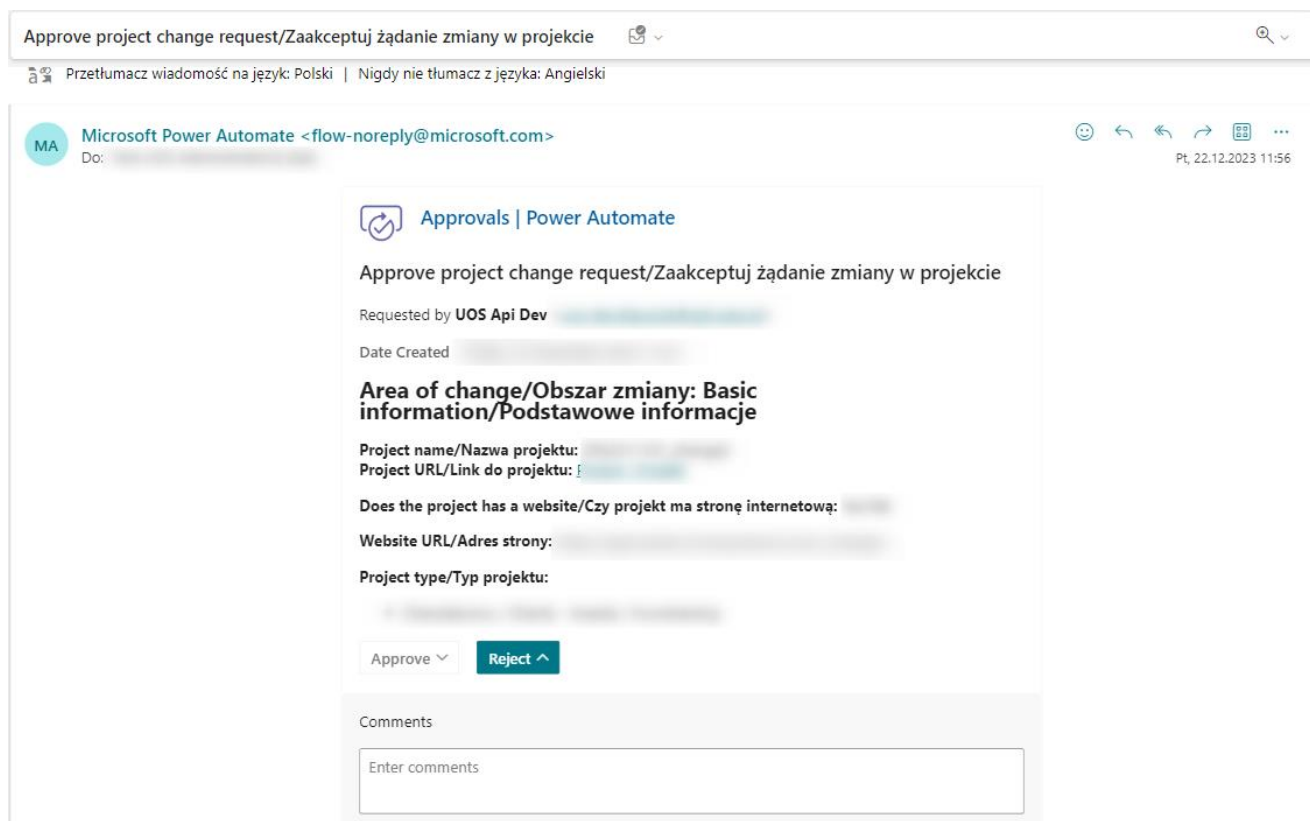
Figure 67 Notification of change request

Requests can only be accepted and rejected in their entirety, i.e. if changes are made to more than one field on one tab within a request, only the entire request is accepted or rejected (there is no partial acceptance or partial rejection).

When a change request requires the approval of any of the roles, all persons with the authority in question receive an email notification containing:

- The name of the project to which the change relates
- Name of the tab affected
- Link to acceptance element

Possible statuses of the data change request:

- New - for new requests that have not yet received any approval
- In the course of acceptance - for requests that have received at least one acceptance
- Accepted - for fully accepted requests (the data of such a request has become project data)
- Rejected - for requests that have been rejected at any stage of acceptance
- Cancelled - for cancelled requests

Table 1 Matrix of change area and accepting team

Area of change	Name of the tab in the UOS (Area)	Member of the Management Board	Supervisor UOS	Centre for Business Cooperation	Promotion department	Data Protection Officer (DPO)	Vice-Rector	Chancellor
Basic parameters of the project (excluding FRS funding)	Basic information	x	x					
Project description	Description	x	x					
Events in the calendar of events	Calendar	x	x					
Cost estimate	Income and costs outside the MTS						x	
Coordinator (assignment of coordinator)	Management	x	x					
Person responsible for settlement (assignment of person responsible for settlement)	Management	x	x					
Management of personal data	Management of personal data	x	x			x		
Broadcasting and recording of events	Transmission and recording	x	x					
Cooperation and patronage	Cooperation	x	x		x			
Cooperation with external companies	Cooperation	x	x	x				
Awards	Other	x	x					x

Disability and special needs	Infrastructure and equipment	x	x					

To create a change request, in the project details, select the *Change Request* button.
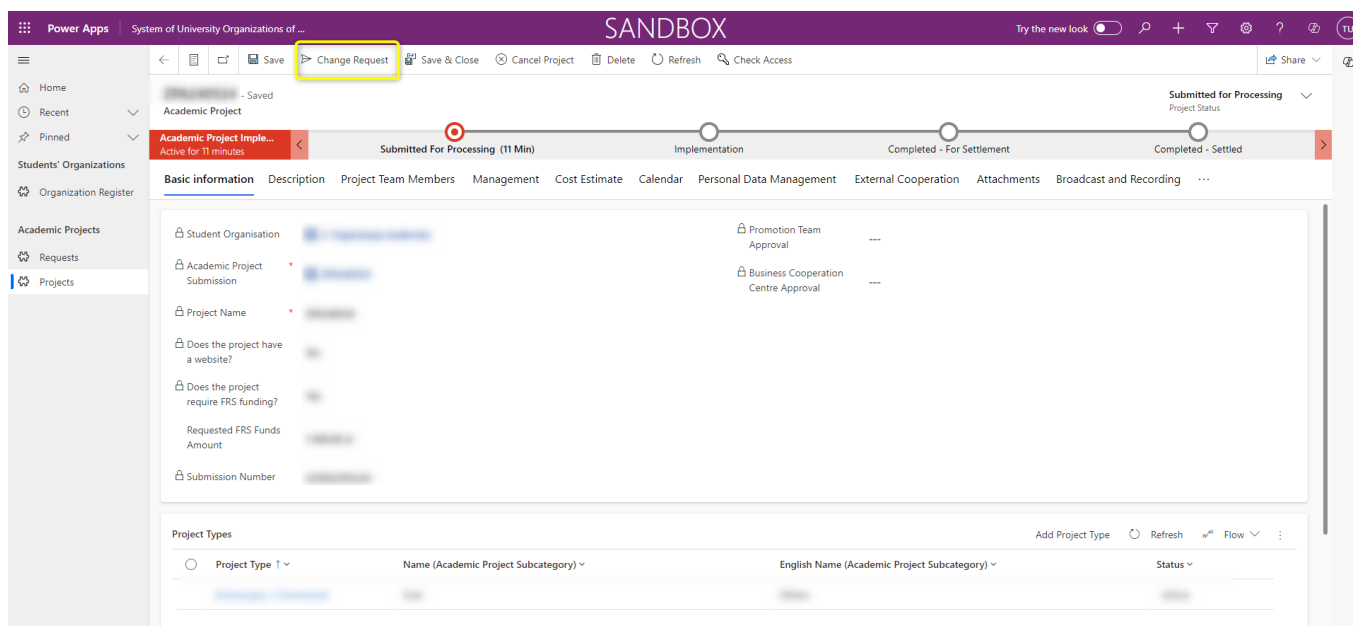
Figure 68 Changing data in a project
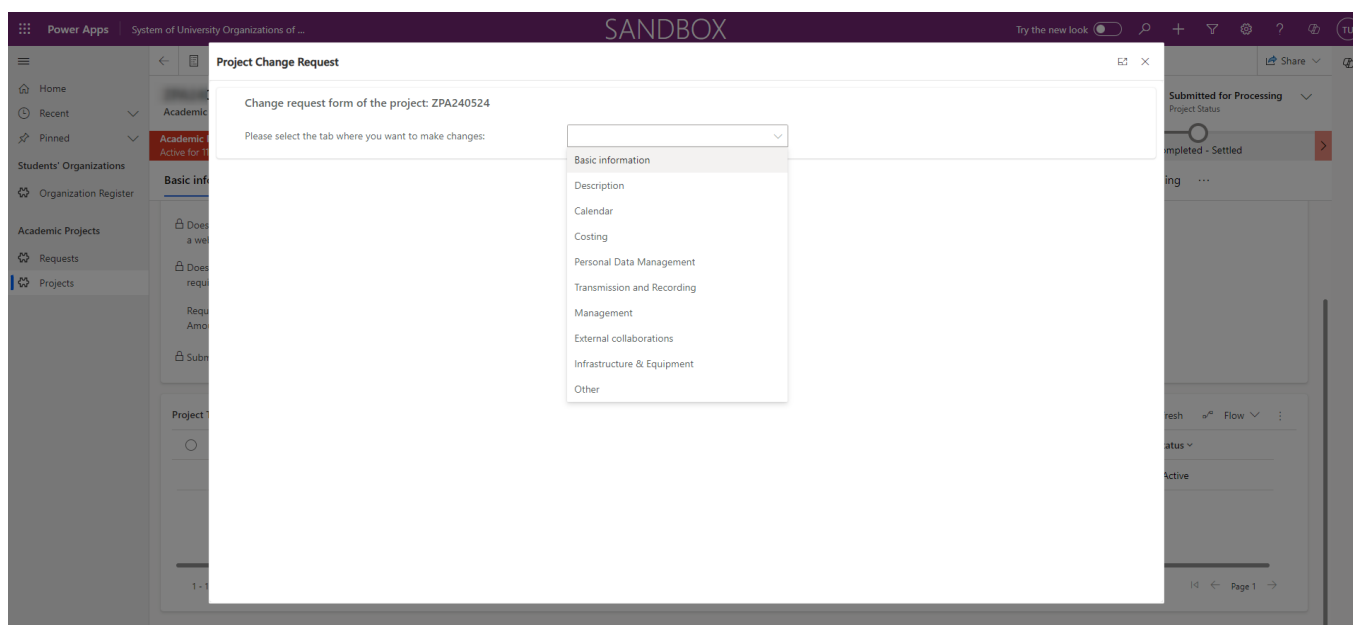
Figure 69 Selection of change request area

The project schedule in the first version is created based on the preliminary schedule. Upon approval by the APR, the schedule from the submission becomes the basic project schedule. Adding new events to the schedule is possible for all projects whose status is not in the terminal status "Cleared".

For a project, a single event entry in the *Calendar* section has the following information:

- Name
- Implementation deadline
- Date and time OD

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- Date and time DO
- Description of activity/event
- Link to the event
- Venue
- Type of event
- Status of the action (selectable from a list of statuses: In Progress, Completed). The status can be changed during the course of the project
- Event for publication - with a checkbox to be ticked. Its marking determines whether the event is made available to the Drupal system, i.e. submitted for publication on the Polish-language SGH website in the student events calendar section. Unmarked events are not subject to publication.

In the case of infrastructure needs, i.e. under the *Infastructure and Equipment* tab (except *Disability and Special Needs*), the change request is made by adding the item directly in the application. The Board Member or optionally the Coordinator creates the change, which must then pass the verification stage.

Figure 70 Change in infrastructure demand

The acceptance or rejection of elements transferred from a request is done by indicating the object and selecting the *Accept/Confirm change/Reject* button.

Acceptance teams

- Department of Didactic Organisation (DOD)
- Information and Technology Infrastructure Team (ZIIiT)
- Low Current Installations Team (ZIN)
- Chancellor

More than one person on the team may have the authority to accept, while the acceptance itself is performed only by one of the authorised persons on the team.

Table 2 Requirements group and accepting team matrix

	Requirements group	Department of Didactic Organisation (DOD)	Information and Technology Infrastructure Team (ITIiT)	ZIN	Chancellor
1.	Room	X			
2.	Parachute Hall sector	X			
3.	Hire of the Assembly Hall		X		
4.	Poster space		X		
5.	Parking spaces		X		
6.	Furniture		X		
7.	Sound equipment			X	
8.	Building G after 22:00				X

When a change is proposed by the Project Co-ordinator, it requires the approval of a Board Member. Once the Board Member has approved the change, or immediately after the Board Member submits the change, it is referred to the Organisation Supervisor for approval. The final decision is made by the approval teams.

Figure 71 Approval of change by Board Member and Supervisor
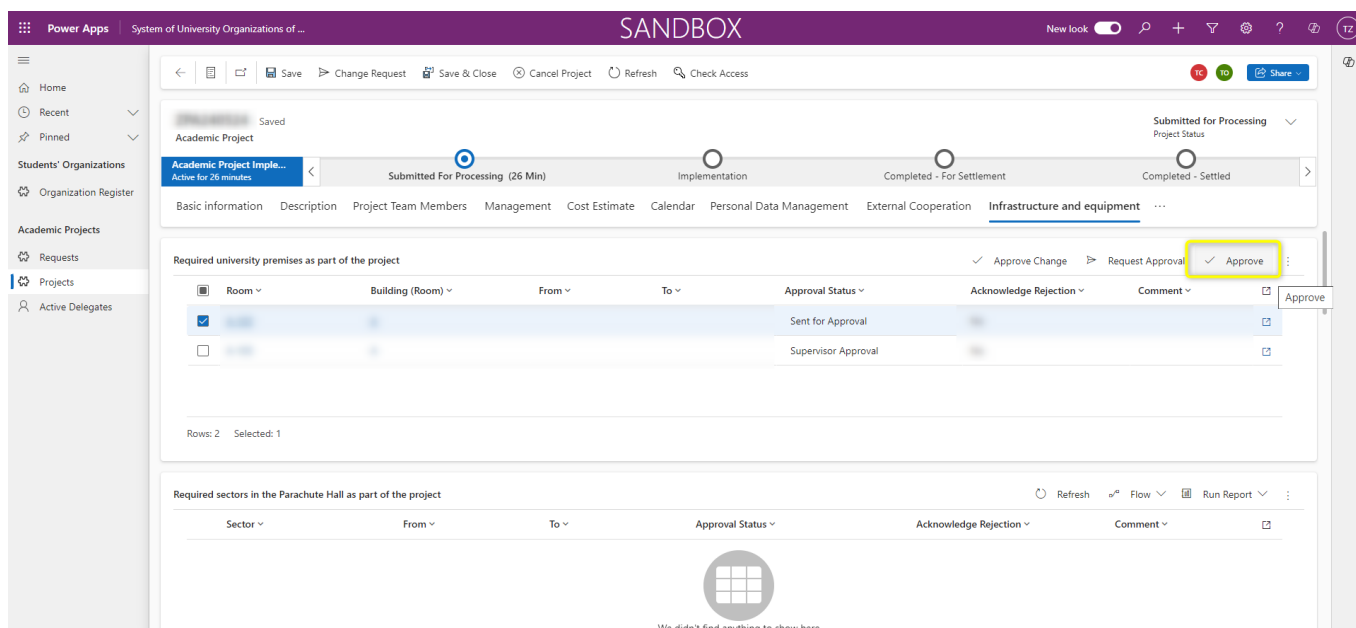
Figure 72 Button dedicated to teams accepting change

To reject a change, go to the selected section, edit the item and then complete a comment on the decision.
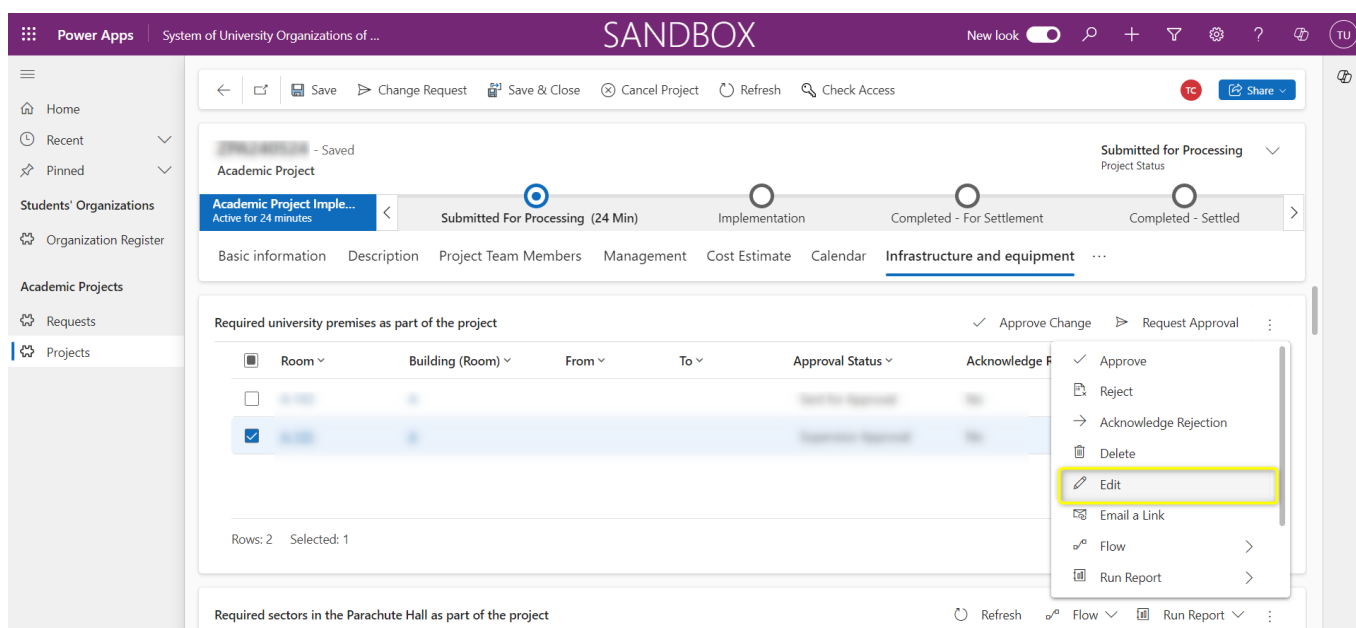
Figure 73 Editing an item to be rejected

Figure 74 Completion of comment with rejection decision

After saving the feedback, return to the section with the edited item, mark it again and then select the *Reject* button.

Figure 75 Rejection of a change by the approver or acceptor of the change

A rejected amendment requires an acknowledgement of rejection by the applicant. Without this action, the project cannot be routed.
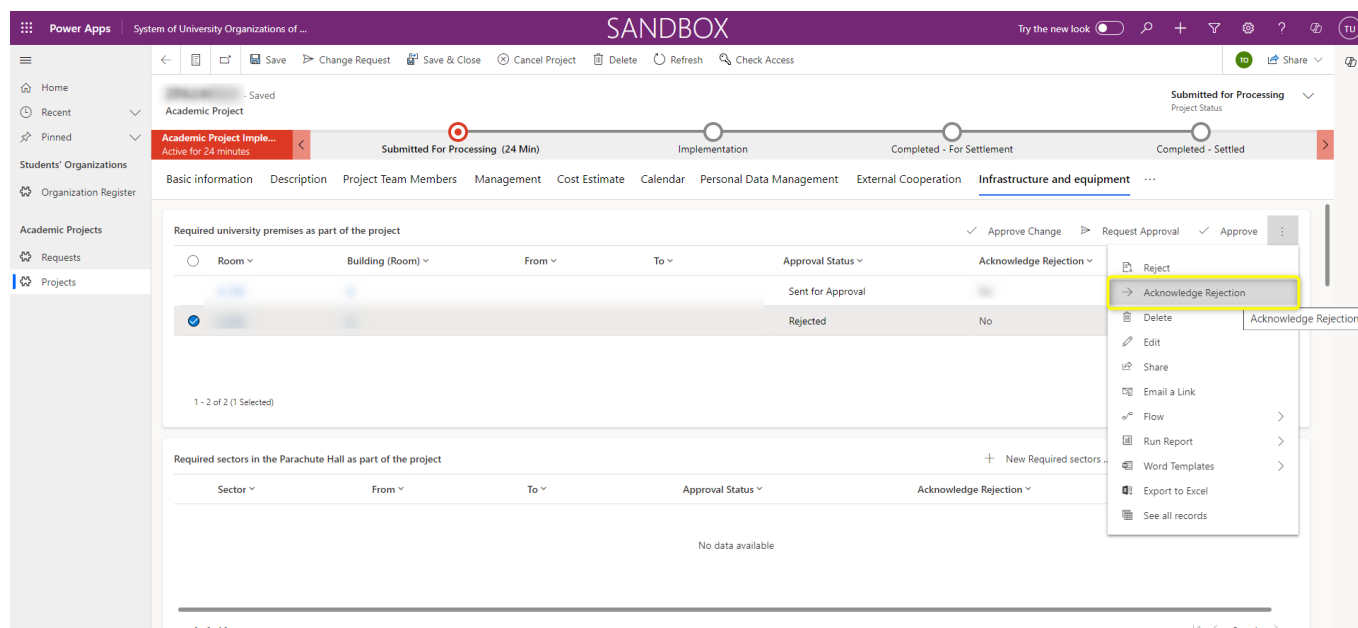
Figure 76 Confirmation of change rejection

6.3.2   Project implementation

A Board Member, the Coordinator or the Organisation Supervisor refers the project to the *Implementation* stage. In addition, in order to refer the project to the Implementation stage, the overall approval of the *Promotion Unit* and the *Business Cooperation Centre* must be obtained in addition to the approval of the individual elements. The field for approval can be found in the project details, in the *Basic Information* section. If there is no approval from one or both teams, a comment must be completed. The field displays when the option *No is selected*. If any option is selected, click *Save* from the top bar each time.
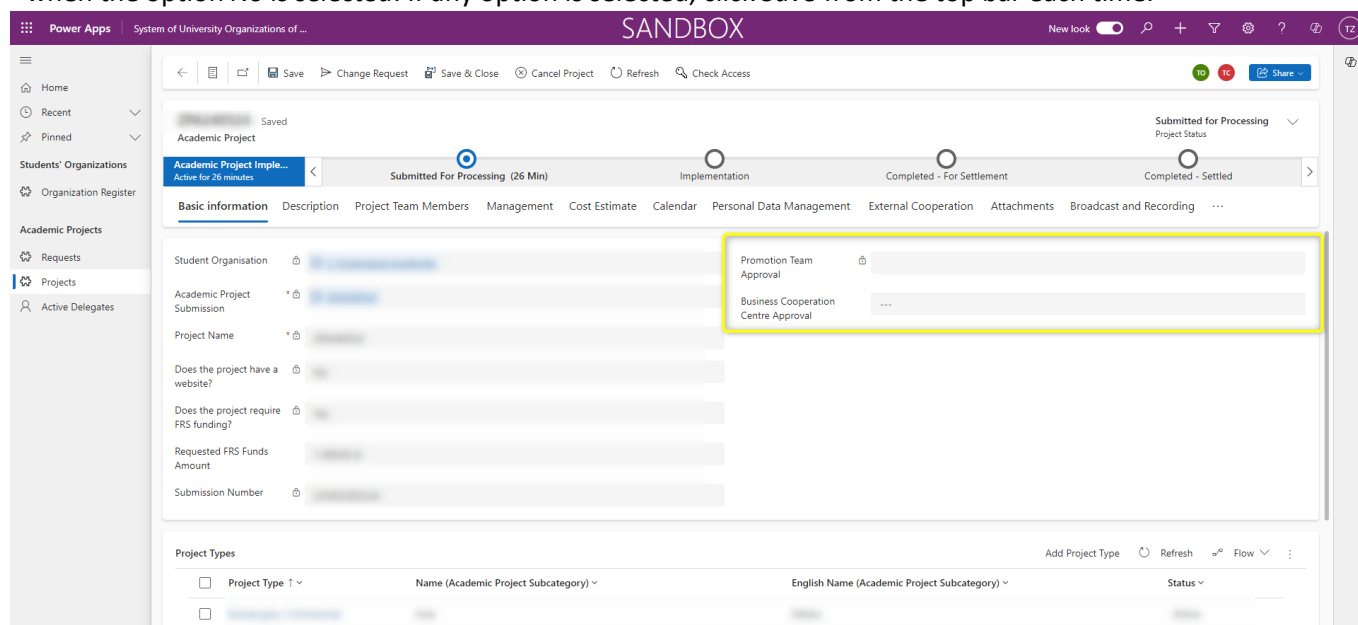
Figure 77 Acceptance or rejection before referral

Upon completion of the project and events, the project may be referred by the Board Member, Coordinator

or Supervisor of the organisation to the final status of Completed or *Completed - to be cleared* if the project is funded by FRS. In such a situation, an additional approval of the project settlement by the Quaestor is required. The Quaestor verifies the project cost estimate and then directs the project to the status Completed *- Cleared* by selecting the *Next stage* button.
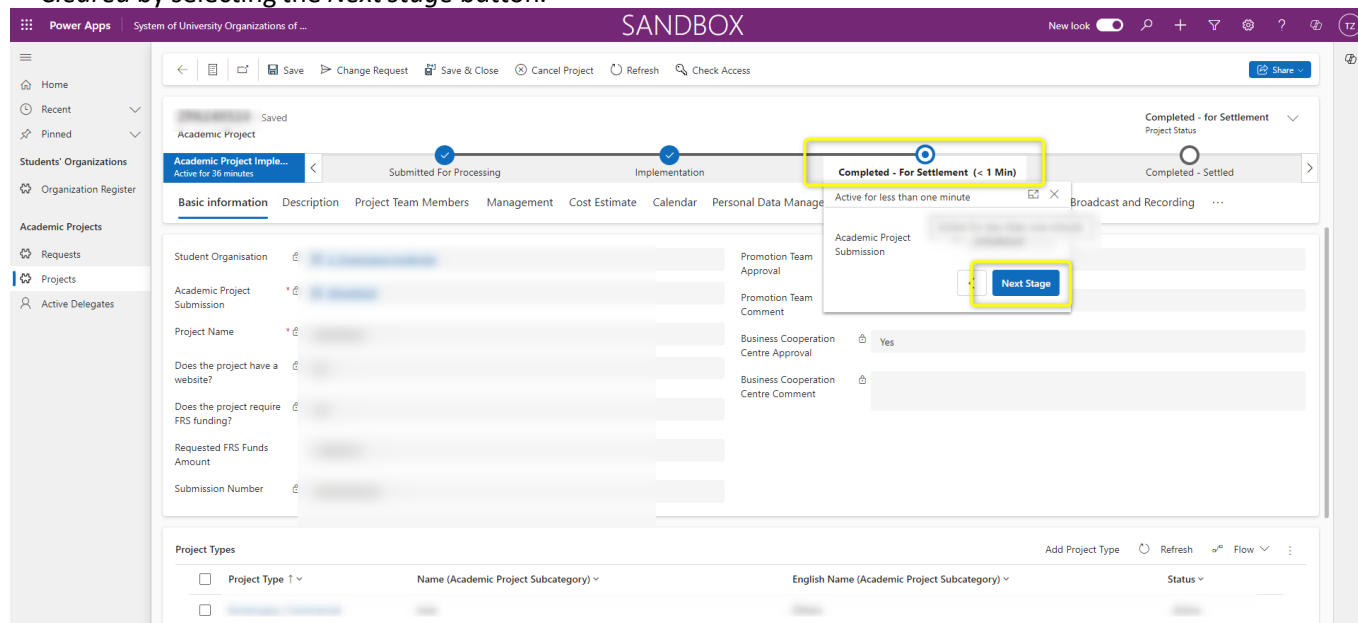
Figure 78 Completion of project by the Chancellor

The project budget in a simplified and extended form is available from the project cost estimate detail level. The simplified preview is visible to the Board Member. The extended preview is visible to the person designated as responsible for the settlement, the project coordinator and the Supervisor. A "Preview" option is available next to the cost estimate, which is a link to the MTS for the indicated budget.
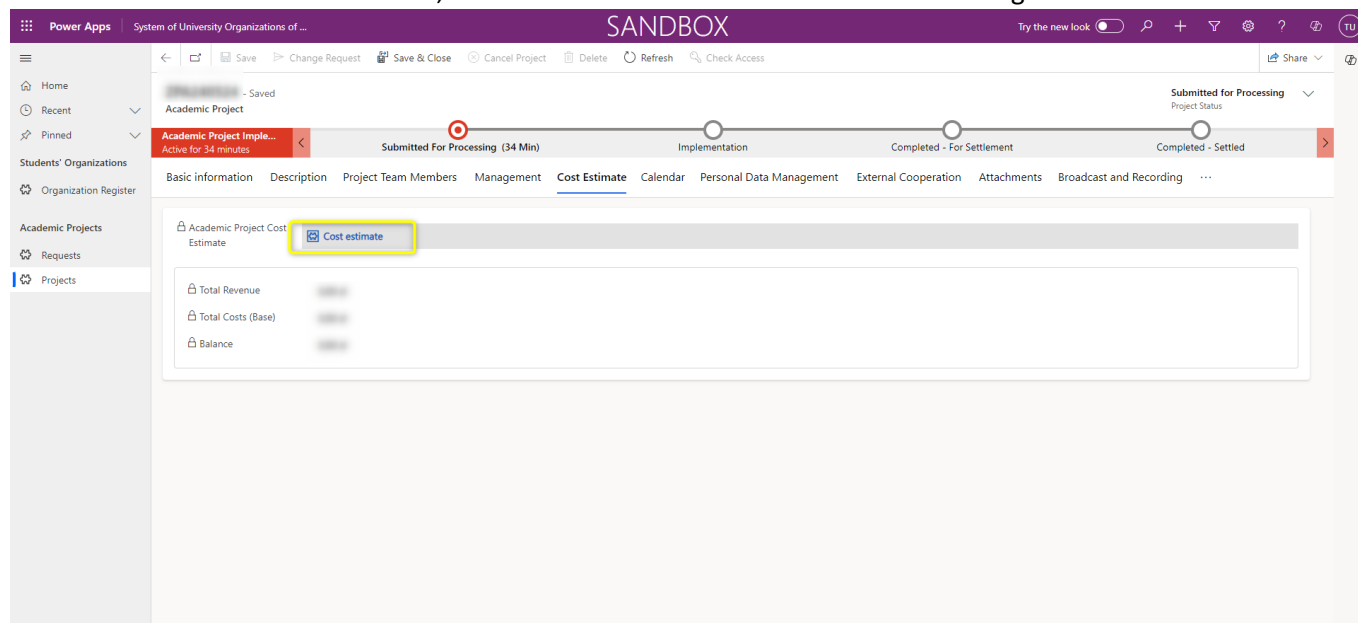
Figure 79 Switching to budget details
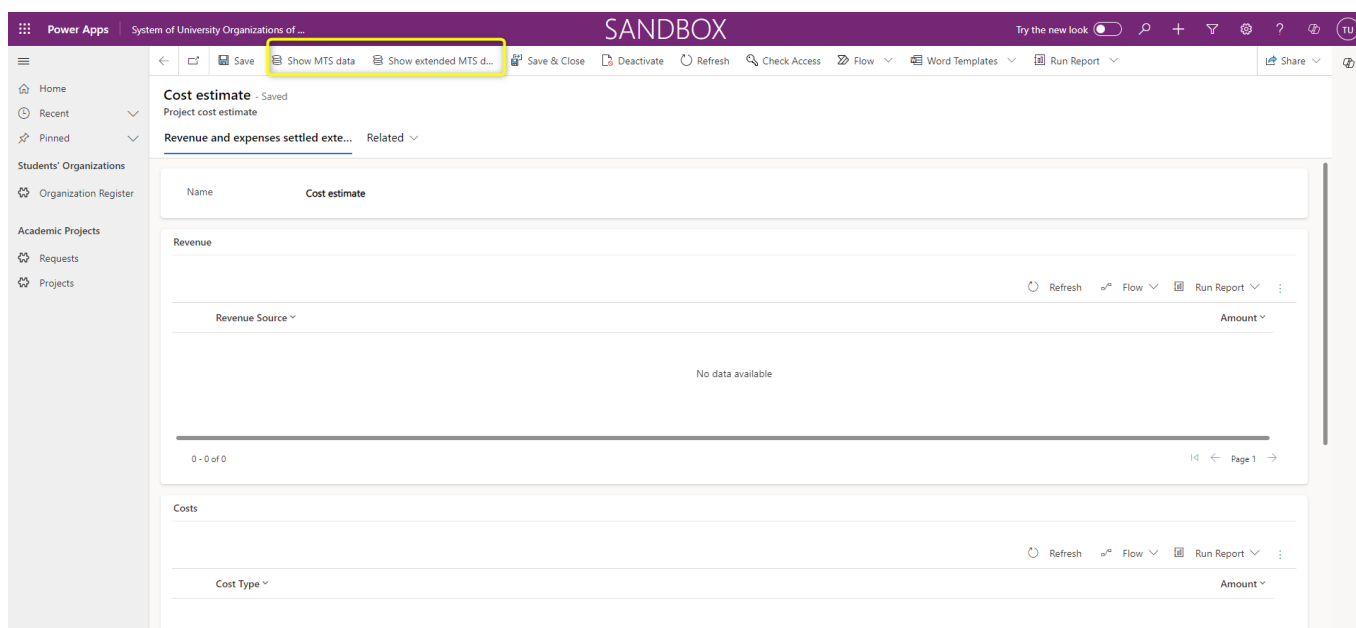
Figure 80 Access to basic and extended budget views

6.3.3 Cancellation of a project

Projects in the status of *Referred to Implementation, Implemented* and can be cancelled by a person with the role of Project Coordinator, Board Member, UOS Supervisor. Cancellation is done by selecting the dedicated option at the project level.

The Cancelled status is the final status of the project. Before cancellation, an additional one appears with a field (mandatory) for entering a comment under *Other*.
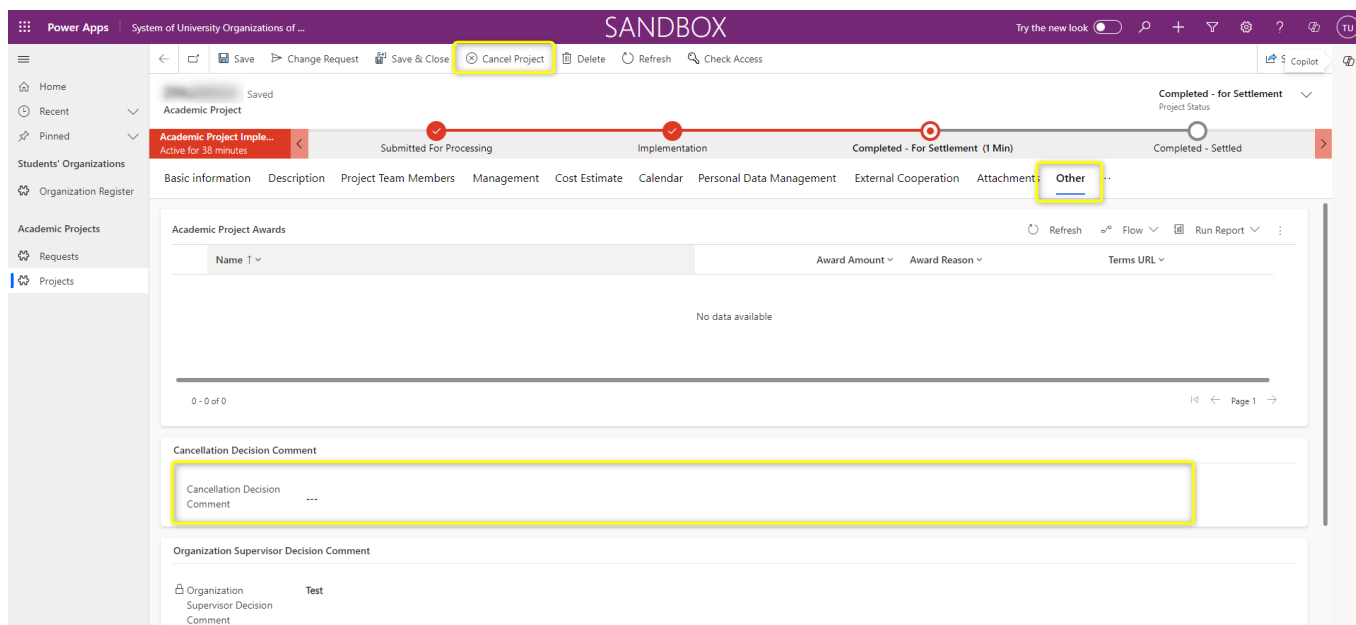
Figure 81 Cancelling a project

7   Additional comments

When there is a problem logging into the Application, add the main link as an exception in the selected browser. Below is an example for the Firefox browser.
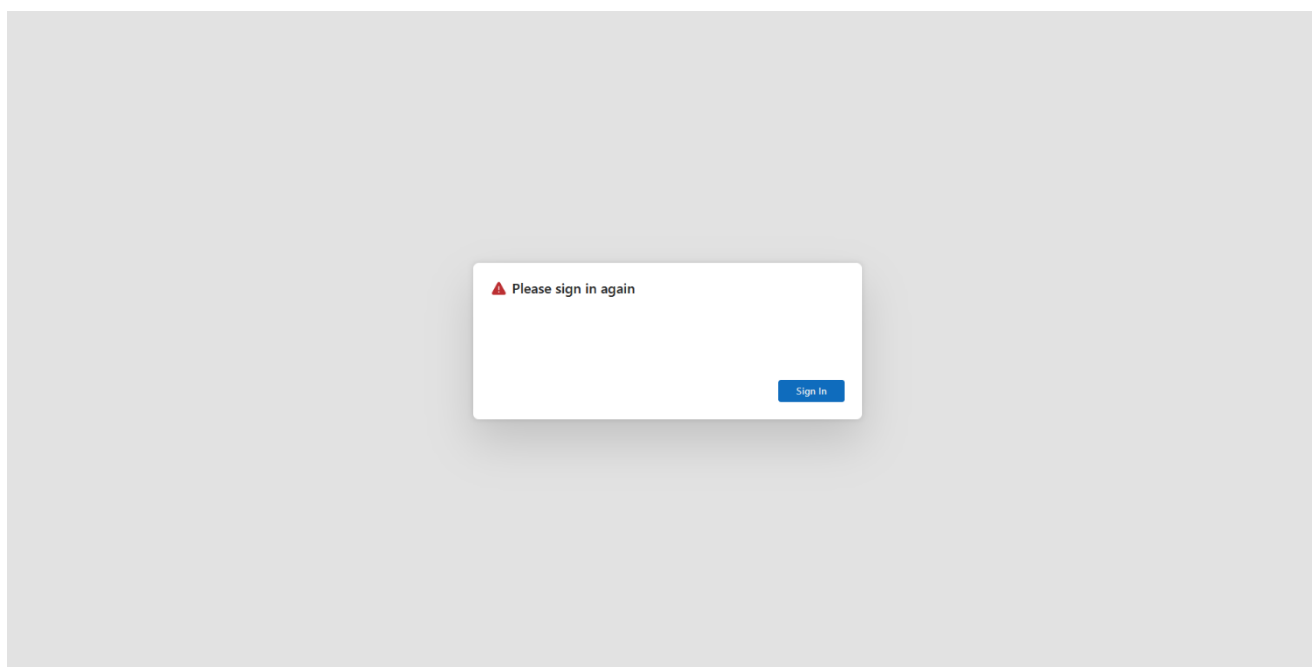
Figure 82 Error message
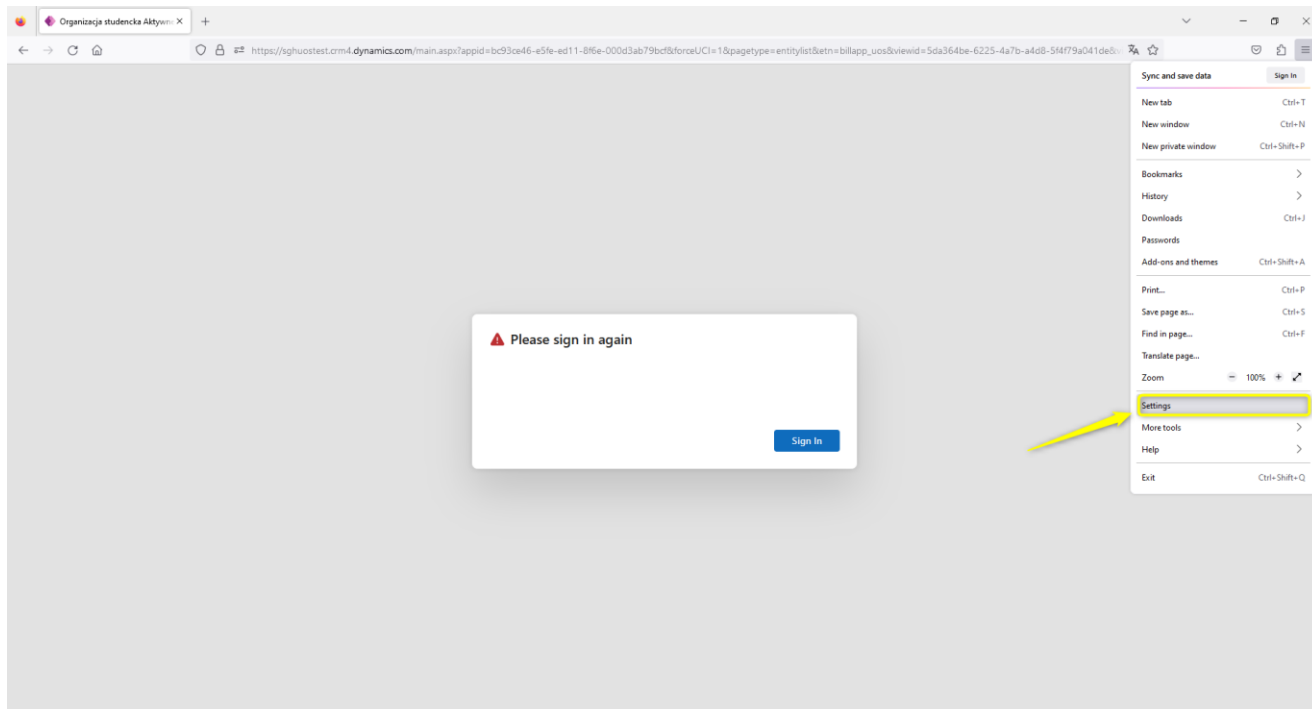
Figure 83 Browser settings

Find in Settings

General
Home
Search
Privacy & Security
Sync
More from Mozilla

Browser Privacy

Enhanced Tracking Protection

Trackers follow you around online to collect information about your browsing habits and interests. Firefox blocks many of these trackers and other malicious scripts.

Learn more

Manage Exceptions...

○ **Standard**

Balanced for protection and performance. Pages will load normally.

Firefox blocks the following:

- Social media trackers
- Cross-site cookies in all windows
- Tracking content in Private Windows
- Cryptominers
- Fingerprinters

Includes Total Cookie Protection, our most powerful privacy feature ever

Total Cookie Protection contains cookies to the site you're on, so trackers can't use them to follow you between sites.   Learn more

○ **Strict**   ⌄

Stronger protection, but may cause some sites or content to break.

○ **Custom**   ⌄

Choose which trackers and scripts to block.

Extensions & Themes

Firefox Support

Send websites a "Do Not Track" signal that you don't want to be tracked   Learn more

Figure 84 Navigation for exception management

Figure 85 Adding a reference to an exception

8 List of figures and tables