

## PhD planner Quick Guide for PhD students: How to update a PhD plan in the planner system

### Log in to the PhD planner

Log in to the system using the username and password you received by e-mail from your graduate school. Please note that you have received two e-mails:

- A mail with the subject heading 'Your username for accessing the PhD planner' which contains your username.
- A mail with the subject heading 'Your credentials for accessing the PhD Planner' which contains a temporary password. The temporary password in this mail is only valid for 24 hours. You can request a new temporary password on the login page by typing in your e-mail address at the bottom of the page. The login pages for each graduate school can be found here:
  - [Arts](#)
  - [Business and Social Science](#)
  - [Science and Technology](#)
  - [Health](#)

Please note when using an iPad, iPhone, tablet or smartphone there can be some difficulties with the responsive design. It is possible to open PhD Planner on these devices but it is difficult to work in the system.

### Start page of the PhD planner

If there is a task waiting for you, you will be directed to the 'Home' tab. If not, you will be directed to your PhD plan on the 'My PhD Plan' tab.

On the 'Home' tab, there are two headings:

- My tasks: Provides a list of your current tasks and their due dates.
- My plans: Provides basic information about your PhD plan.

Under the heading 'My tasks', you will find the subheading 'Select' on the right-hand side. There are two options under 'Select':

- View: Takes you to 'Plan details' on the 'My PhD Plan' tab where you can create and edit your plan before sending it to your main supervisor for assessment.
- Update: Takes you directly to the assessment of your PhD plan.

### Create or edit the PhD plan

To create or edit your plan, click 'View' on the 'Home' tab.

#### To add a new plan element:

Click the dark grey 'Add plan element' button in the top left-hand corner. Select a plan element from the dropdown menu, click 'Next', and fill in the relevant boxes. Remember to click 'Save' at the bottom of the page afterwards.

#### To edit a plan element:

Click 'Edit' next to the relevant plan element and edit the relevant boxes. Remember to click the 'Save' at the bottom of the page afterwards.

Please note that the element 'Financing plan' is the only element that cannot be edited. Your graduate school administers this element.

For more detailed information, please see the ['PhD Students' Comprehensive Guide'](#).

#### Assessment

After you have created or edited your PhD plan, you must enter your overall assessment. There are two ways of doing this:

- Click the 'Update' link in the top right corner of the 'Plan details' tab.
- Click 'Update' on the right-hand side under the subheading 'Select' from the 'Home' tab.

First, register your overall assessment in the dropdown menu 'Assessment'. For further information about the different assessment options, please click the read more link on the right-hand side of the dropdown menu. Next, if you are entering an intermediate evaluation or a final evaluation, describe the progress of and changes in your PhD studies since the last evaluation.

Please click the read more link at the top of the page for further details regarding the assessment.

If you wish to make further changes to your plan at a later time before sending it to your main supervisor, click 'Save'. If you wish to look at the plan again, you can click 'View plan details'. You can write notes to yourself in the yellow box (on the left-hand side), such as a reminder to revise something at a later time. Your notes will not be sent to your main supervisor.

When you are ready to send the PhD plan to your main supervisor, click 'Send to supervisor' at the bottom of the page on the right-hand side. You may use the yellow field here to send a note to your main supervisor.

#### Approved PhD plan

An approval snapshot of the PhD plan will be saved when the PhD plan has gone through the workflow and been approved by all parties. You can find the approval snapshot under the sub-tab 'Plan history' on the tab 'PhD plan'.