Setting up MyPLAN in Teams

Supervisors will need to establish communication and feedback processes with all of their off-campus students, particularly as they are not able to meet face-to-face. One of the applications available for this is Microsoft Teams. Teams is a communication and collaboration platform for Microsoft Office 365 that allows integration of several apps that are useful for the research journey.

Teams houses functionality that allows for document editing and storage on a single platform for multiple uses. This lends itself well to the issue of document management for research, particularly when it comes to documentation around the supervisory relationship.

Section 4.2: Supervisory Arrangements of the Supervision guide for the *Australian Code for the Responsible Conduct of Research* emphasises the need to agree in writing on a number of aspects of supervision:

- expectations related to progression and development
- the appropriate level of oversight of the development and conduct of the research
- expectations related to work product or deliverables, if relevant
- expectations related to the involvement of the supervisor in the work of the individual/s under supervision, or vice versa, if relevant
- arrangements related to any planned co-authorship
- any necessary training for the individual/s under supervision (beyond that provided per section 3.2)
- the frequency and format of meetings
- expectations related to contact between meetings
- the nature and format of feedback
- how any disputes will be resolved
- when and how the agreement will be reviewed during the supervisory relationship.

At ECU this is done using **MyPLAN** (Postgraduate Learning and Networking). MyPLAN contains the following documents:

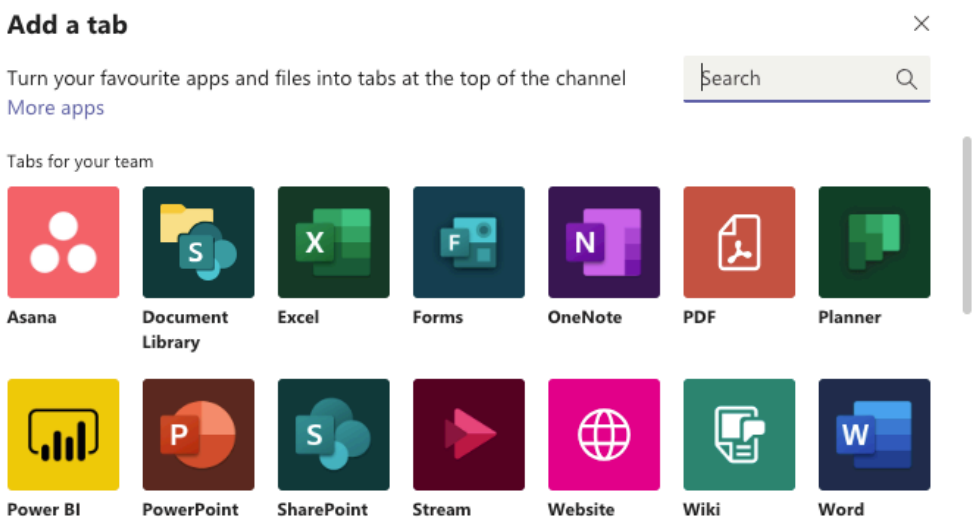
- The Candidate/Supervisor Agreement
- Learning Plans (for Early, Mid, and Late-Stage Candidature)
- Publication Plan
- Candidate/Supervisor Meeting Record

MyPLAN is a **requirement for Confirmation of Candidature.** Students and supervisors are advised to complete the Candidate/Supervisor Agreement in their first meetings as it sets out expectations for the rest of the research journey.

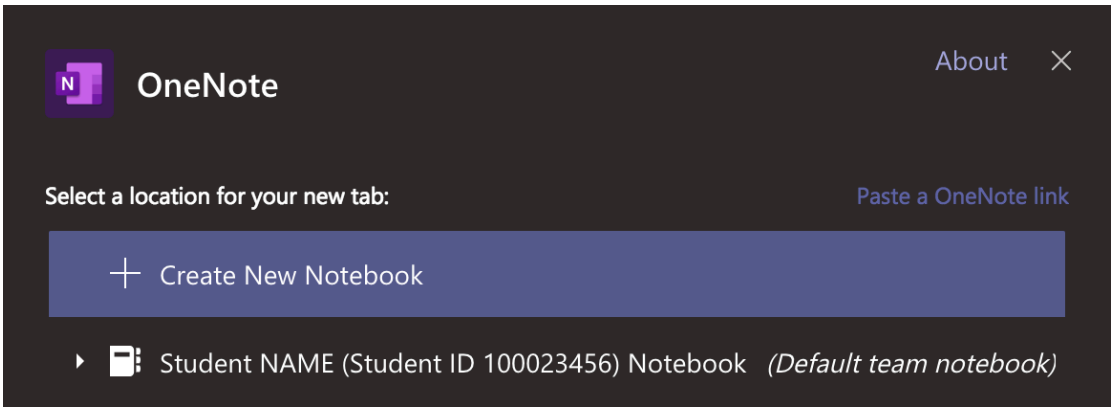
The files for MyPLAN are available to staff and students, via the Research Intranet.
The documents can be accessed from: https://intranet.ecu.edu.au/research/for-research-students/research-journey/myplan

Using a OneNote Notebook for MyPlan:
We recommend using the OneNote Notebook app for MyPlan in Teams. While the information is provided in document form, keeping it in the notebook allows for greater flexibility and editing potential. This is particularly useful in tracking amendments to the agreement and plans. It also reduces the number of document files needed for MyPLAN by condensing it into a single notebook rather than multiple documents.

You can add a OneNote Notebook as you would add any app, by using the '+' symbol at the top of the workspace to access the list of available applications.



You will be given an option to either use the default Notebook associated with the Team or create a new one. It is recommended to create a new Notebook and name it MyPLAN.



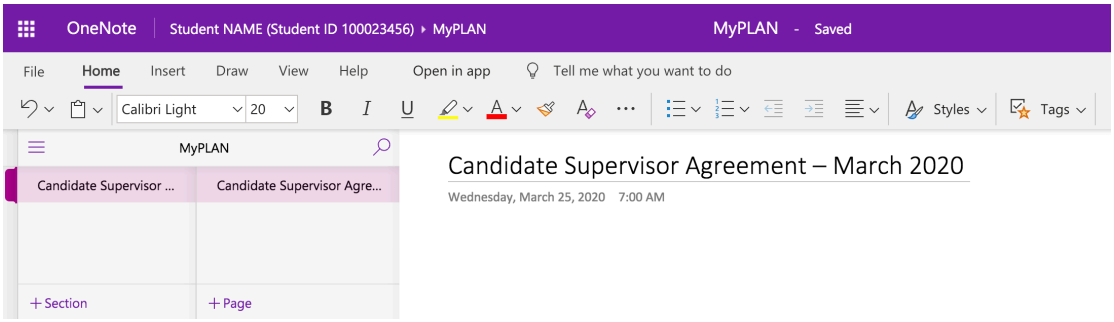
NOTE: If you are an owner of multiple Teams, you may see options to copy notebooks or place them in other Teams. Ignore this for now, as it will link the Notebooks and cause changes in one to affect all.

The Notebook should open automatically after creation. If it doesn't, click on the new Tab (that will have the name of the Notebook) to access it.

To set up MyPLAN, it is recommended that you edit the notebook setup to reflect the documents. You can do this from the Teams interface, in the OneNote app, or by opening OneNote in a browser.

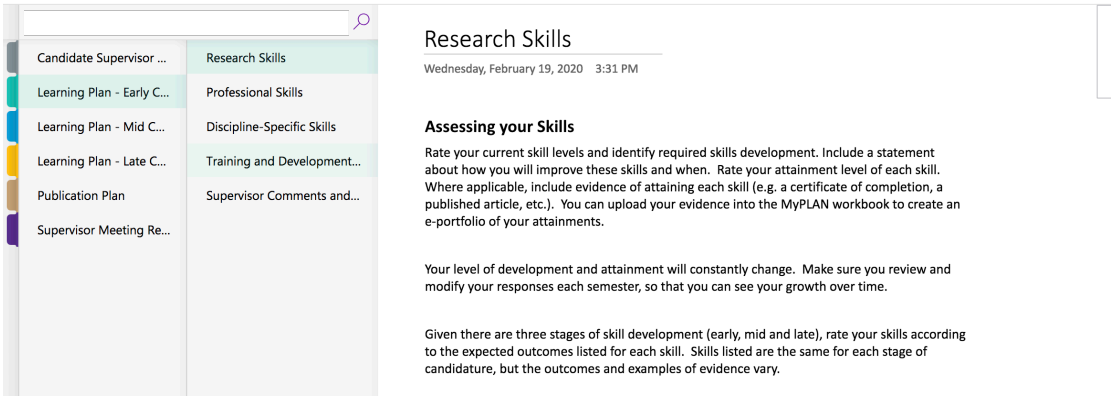
New Section: Right-click on the 'Untitled Section' tab and choose 'Rename Section' to edit the section name e.g. Candidate Supervisor Agreement. Create a new section by clicking on the '+ Section' button at the bottom of the interface. Repeat this for each of the Learning Plans, the Publication Plan, and the Student/Supervisor Meeting Record, as well as any other documents that may be relevant to MyPLAN.

New Page: Click on the page itself to give it a title. This will be reflected in the Page pane automatically. Click below the title to add and edit content. Create a new page by clicking on the '+ Page' button at the bottom of the interface – this may be useful to show different headings within a single document, iterations and amendments.



The content for the MyPLAN Notebook will need to be *copied* from the documents available from the MyPLAN page on the Research Student Intranet. This will only need to be done once, while you are setting up the notebook, and will enable easy access to content after.

A completed MyPLAN notebook should look like this after setting up:

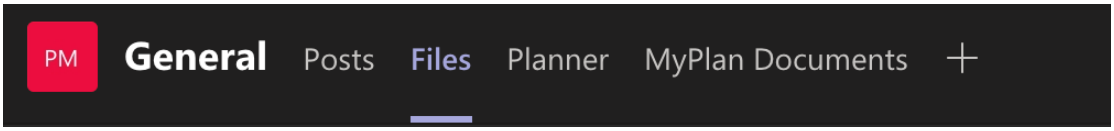


The Notebook is also accessible as a single resource in the Files section of the Teams Workspace after saving.

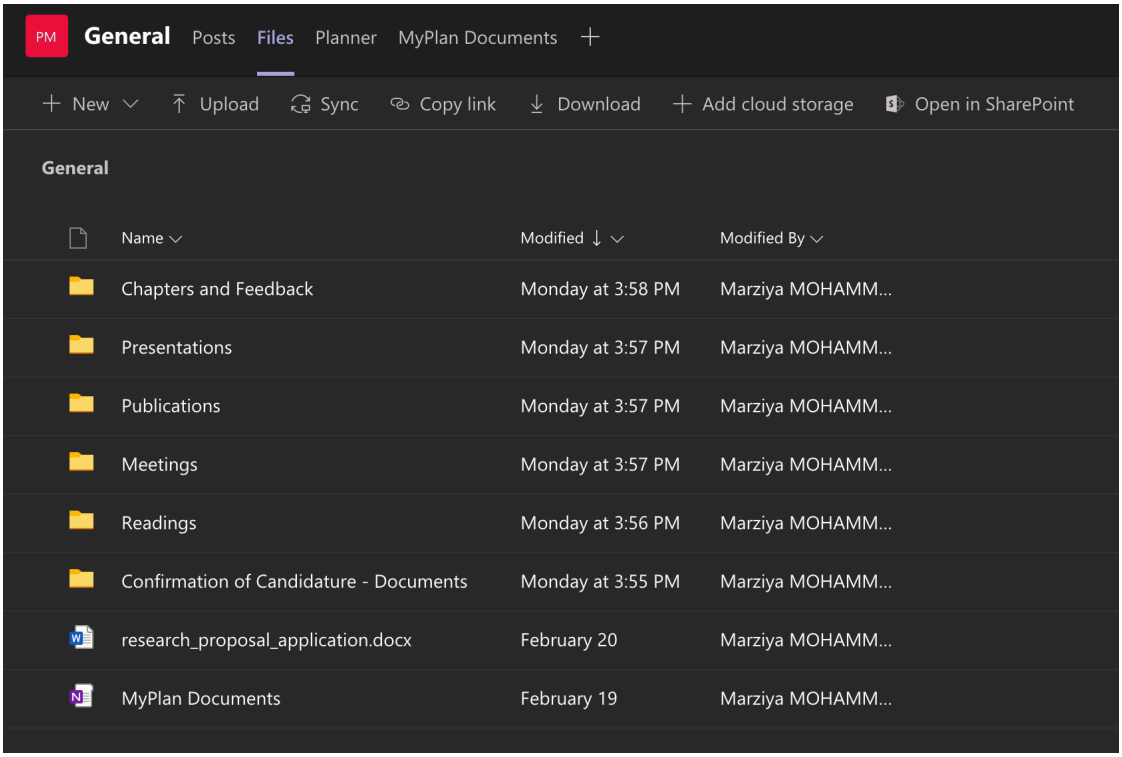
Managing Documents in Teams

Teams offers a number of ways to store documents, including uploading documents to the files space or transferring them into OneNote Notebooks. It is good to consider how the documents are to be used and how you can use the Teams workspace to manage this.

Using the Files space:
You can upload documents straight into the Files space, using it as a repository for all research materials that need to be stored and accessed by the research team. This can be accessed from the tabs at the top of the workspace



It is advisable to set up a file structure similar to how you may set up a shared drive or other storage space. Organising the documents is crucial for data management and having a clear file structure right from the outset will allow for a better experience. The Files area also allows for editing within the teams space for Word, Excel and Powerpoint files, and versions can be marked clearly for control purposes.



A recommended setup would have folders for:

- Confirmation of Candidature documents – including GRIP completion statement, any copies of administrative documents, and a sub-folder dealing with the proposal and associated docs
- Chapters and Feedback – students' written work, versions and feedback from supervisors
- Readings – readings that may be shared with the student and supervisor team
- Meetings – a record of all meetings, including agendas and action items

- Publications – Work in progress on any publications that the student may be involved in writing.
- Presentations – a record of any presentations the student may be putting together, including notes and powerpoint slides

There may be other documents that are required throughout the research journey, which can be placed into appropriate folders within the file structure. Some of these may be discipline-specific so it is important to identify what may be needed, and plan and organise accordingly.