

Logging in

To use the PBRF system you need an Education Sector Logon (ESL) (user name and password) registered by the Ministry of Education.

To get an ESL logon contact the TEC Sector Helpdesk on **0800 727 301** or **+64 4 462 5804** or email **pbrfhelp@tec.govt.nz**.

Once you have your ESL details:

1. From your web browser, go to **<https://www.pbrf2018.ac.nz>**.
2. Select **Log in to PBRF System**.
3. On the ESL page, enter your ESL user name and password. Follow instructions about security questions or resetting your password.
4. After logging in, you should be redirected back to the PBRF IT System. If not, repeat steps 1 to 3.
5. If you have more than one organisation registered against your ESL, you may need to identify the organisation that you are representing in this Quality Evaluation, or get a login for each organisation.

Before you begin

Minimum system requirements

Browsers:

Chrome – version 52 or higher

Firefox – version 45 or higher

Safari – version 5 or higher

Internet Explorer – 11 or higher (see the TEO user guide for configuration requirements)

This does not mean that you cannot use any other browsers; just that you may experience some problems if you are using an earlier browser version.

JavaScript and cookies: must be on

Screen resolution: a minimum of 1024 x 768

Plus installed software for viewing images, video, PDFs, Word documents.

Common tasks

Editing your details

1. From the home tab select **View my Details**.
2. From the *Details* screen, select **Edit**. Note, you don't need to bold or italicise anything. (You cannot edit your ESL user name.)
3. When finished editing, select **Save**, or select **Cancel** to cancel out of editing.

Filtering options

To filter a page:

1. Select the desired filter option from the drop-down list (side menu). Note: not available on all pages.
2. Select **Reset** (side menu) to reset the filters.

Searching

You can search within the grids of the **Evidence Portfolios** tab, the **Staff Data** tab, **The Panellists** tab and the **Validation Logs** tab.

To use the search function:

1. Enter all or part of the text or number you want to search for in the search box (top of grid). If searching for a full name, for example, for the name John Smith, enter it as John Smith, not Smith, John.
2. Select the search icon (right side of search box) or press **enter**. You can search for another EP from within an EP. Use the sidebar search (right of screen). To search within an EP use **Ctrl-F**.

Validation

Validation is the process by which all files and uploads are checked. Validation takes place on:

- › XML files on upload
- › *Draft* EPs upon submission for validation
- › *Withdrawn* EPs on reinstatement
- › CSV Staff Data file on upload.

NRO files are also checked for the correct extension, or for any viruses, when they are uploaded by the user interface or by FTP.

The Validation Logs tab

The status of any file uploaded to the PBRF IT System can be seen in the grid on the **Validation Logs** tab.

Validation log statuses include:

- › Pending
- › Processing
- › Successful
- › Unsuccessful
- › Warnings
- › Cancelled

For descriptions of Validation log statuses, see page 21 in the *IT System User Guide for TEO Administrators*.

1. EPs can be created manually, or via XML, or a combination of both.
2. EPs and NROs can be uploaded via the web interface or FTP.
3. Only EPs that are created manually within the PBRF IT System can be edited online.
4. EPs in the PBRF IT System can have one of the following statuses: *Active*, *Assessable*, *Draft* or *Withdrawn*.
5. Only EPs with a *Draft* status can be edited.
6. Any EP created in the PBRF IT System can be withdrawn and reinstated.

■ Manually creating and editing EPs

Creating an EP

1. Go to the **Evidence Portfolio** tab and select **Create Evidence Portfolio** (right side).
2. From the *Create Evidence Portfolio* window, enter the Evidence Portfolio Details, Researcher Details, Panel Details and Platform of Research – Contextual Summary Details. A red asterisk (*) denotes a mandatory field. See the Tips panel for help.
3. Select **Save** (side menu) when finished to save your basic EP. You will be taken to the *Draft* of the EP.
4. From the basic EP, you can add components to the EP. See the Tips panel for help with this.
5. Select **Save** (side menu) after finishing each component. Note: the system will prompt you to correct any errors you have made before saving.
6. When the EP has the minimum requirements (basic detail and one NRO), the **Submit for Validation** button will appear (top of side menu). When you have completed the EP, select this for the EP to be validated.

■ Editing EPs created from the web interface

EITHER: If the EP is still in *Draft* (has not been validated).

1. From the **Evidence Portfolios** tab, select *Draft* from the Filter by Status dropdown menu.
2. From the displayed EPs with *Draft* status, click on the EP identifier of the EP you wish to edit.
3. To edit EP Details, Researcher Details, or Panel Details, select the **Edit** link next to the applicable heading.
4. To edit any of the components, select the appropriate heading, then select the **Edit** link.
5. To create a new NRO, ORO, Research Contribution item or add an extraordinary circumstance select the Add link in the heading next to the appropriate component.
6. When finished editing, select **Save** (side menu), or select **Cancel** (side menu) to cancel out of editing

OR: If the EP is *Active*, first copy the EP as a *Draft*, then edit the *Draft*, then submit the EP for validation. If it is successfully validated, it will replace the original EP.

To copy an *Active* EP as a *Draft*:

1. From the **Evidence Portfolios** tab, select the EP that you wish to edit by clicking on the EP Identifier.
2. Select **Copy as Draft** (side menu on the right). Note: if the EP was created using an XML upload, the **Copy as Draft** button will not be displayed.
3. You will be prompted to ask if you want to make a copy. Select **OK**.
4. Your action will be confirmed, and you will be redirected to the *Draft* you have just created.

Edit the *Draft* as normal, and when finished, select **Submit for Validation** (side menu).

■ Uploading XML files

XML files must have a unique name. They must be prepared following the *2018 Evidence Portfolio Schema Definition* and validated against the supplied XSD.

Using FTP

What you will need:

- › FTP client application installed on your PC
- › correct connection settings using the FTP user name and password supplied by the TEC
- › correct ports open on your institutional firewall.

1. Use the **Upload Evidence Portfolio File** button.
2. Drag the file from your PC into the appropriate folder on the PBRF IT System. Or open the folder (EPs or NRO files) on the PBRF IT System and double click on the file on your PC.
3. To confirm the upload has been successful, check the results in the **Validation Logs** page.

Web interface

1. From the **Evidence Portfolios** tab, select **Upload Evidence Portfolio**.
2. The *Evidence Portfolio Upload* window will open.
3. Choose **Select File**. Select the XML file you wish to upload.
4. Select **Submit File** to upload your file.
5. Once your upload is completed, you will see a confirmation message. You will then be redirected to the **Validation Logs** tab to see if your XML file passes validation.

Once your file has been validated, any EPs created from it will appear under the **Evidence Portfolios** tab as *Active* EPs.

■ Uploading NRO files

These files are referenced in the NRO component of the EP either:

- › by including their name (for example, myresearch.pdf) in the URI section of the NRO, and then uploading the file with the same name to the PBRF IT System; or
- › including a valid reference to a file available on the internet in the form of a URI (for example, <http://www.myresearch.com/research.pdf>).

Files that are to be uploaded to the PBRF IT System:

1. Must have one of the approved file extensions.
2. Must be checked for viruses and malware. Although the PBRF IT System checks all uploaded files, it is the responsibility of users to scan files before uploading them.
3. Should be a size that allows for viewing or downloading over a normal internet connection by the panellist.

If there is a large file in the URI for the main research object in an NRO, please indicate this in the EP submission.

You can manage large files by:

- › using YouTube, Vimeo or Ustream for large videos (over 350 megabytes)
- › loading the large file onto a USB stick instead of via a URI (this can then be provided to the panel on request via the TEC)
- › compressing the file using an efficient codec such as Xdiv
- › reducing the frame rate or resolution
- › uploading representative sections of a whole video rather than the entire video.



Staff Data file

Staff Data is uploaded to the PBRF IT System in CSV format.

- › The file must have the correct structure, and must comply with the requirements identified in the *PBRF 2018 Quality Evaluation Staff Data File specification*.
- › The file must have the .CSV extension (for example, mystaffdata.csv).

When the file is uploaded to the PBRF IT System, it will first be checked for structure. It will then be checked to ensure that it meets the requirements identified in the *PBRF 2018 Quality Evaluation Staff Data File specification*.

- › If the file passes all checks, the file will replace any current Staff Data for the tertiary education organisation (TEO).
- › If the file does not pass all checks, the entire file will fail, and no changes will be made to the Staff Data of the TEO.

Note: Staff Data files do not add to existing Staff Data files, they replace them. To check the status of your EPs against the Staff Data file, run the *Evidence Portfolio Errors and Warnings Report*.

🚫 Error and warnings report

To run the *Evidence Portfolio Errors and Warnings Report*, from the **Evidence Portfolios** tab, select **Check Errors & Warnings** (side menu).

The *Evidence Portfolio Errors and Warnings Report* provides the TEO with a snapshot of the submission process for their organisation.

■ Uploading Staff Data files

From the **Staff Data** tab or **Validation Logs** tab, select **Upload Staff Data File** (side menu).

1. The *Staff Data file Upload* window will open.
2. Use **Select File** to select the CSV file you wish to upload.
3. Select **Submit File** (side menu) to upload your file.

Once your upload has completed, you will be redirected to the **Validation Logs** page to check if your Staff Data file has been successfully validated.

