These guidance notes will tell you how to edit a programme using the Unit & Programme Management System (UPMS).

Please note that only users with the **Programme Editor role** will be able to edit programmes on the UPMS.

There are 7 steps to editing a programme:

**STEP 1: Logging in to the system and setting up a new proposal**

**STEP 2: Searching for a programme to edit**

**STEP3: Programme Versioning**

**STEP 4: Editing the programme structure**

**STEP 5: Editing the programme specification**

**STEP 6: Entering ‘approval’ information**

**STEP 7: Submitting the proposal**

**Hints and Tips for Navigating the System**

**STEP 1: Logging in to the system and setting up a new proposal**

To access the web screens, please go to [https://www.bris.ac.uk/esu/approvalprocess](https://www.bris.ac.uk/esu/approvalprocess).

You will need to login using the link in the left hand navigation bar or centre of the page. Please enter your University of Bristol username and password.

The first thing you need to do is set up a new proposal. If you think of a proposal as the whole bundle of information you need to be approved then you need to make all changes within that proposal (programme changes, new units, changes to units, withdrawals etc).

Only include changes that are relevant to each other, if the changes aren’t linked they should be separated into another proposal. However; you need to be careful not to edit a programme in more than one proposal at a time as one set of changes could overwrite the other.
1. Click on ‘Create New Proposal’ in the left hand navigation bar

2. Name your proposal and press save.

Your proposal name can be anything you want – for example:

- Updating programme structure for BSc in Biology - 10 May 2015
- MA History changes for 2015/16 – 15 January 2015

However remember that the proposal title will be shown on paperwork printed for committees so please use a title that is meaningful.
STEP 2: Searching for a programme to edit

From the contents page of your proposal, you can drill down to find a programme by Faculty and School/Department:

Alternatively you can browse by the A-Z list of all programmes or you can search by name or route code (e.g. 1ENGL001U) using the search box in the top right hand corner of the screen.

Once you have navigated to your programme, you will be taken to a view of the most recent version of the programme (with the programme structure showing). You should also notice a new navigation box on the left hand side specifically for this programme.
STEP3: Programme Versioning

You will need to create a new ‘Version’ of your programme for a future academic year. So, if the new version of your programme is to start in 2016/17 for all year 1 students, you will need to create a new version of the programme for 16/17. Any students starting in 16/17 will automatically be linked to that version of the programme. If the new version was for 2nd year students in year 16/17, the new version would be for 15/16 as this is the cohort entry year.

Click on the link on the left called “All Versions” and then click on “split” for the year you want create a new version for:

![All Versions table]

Above you can see that an old version has been closed off for 2012/13 and 2013/14 and a new version has been created for 2014/15 onwards. You can click on this new version to be taken to it.

We advise that you edit your earlier cohort(s) before creating future splits.

If you are proposing to make changes to all years of your programme in a single year then you will need to ensure that you edit the correct versions (or cohorts) of the programme to apply the changes to all years. For example, if you need to edit the 1st, 2nd and 3rd years of your programme to run in 16/17, then you will need to edit the 2014/15, 2015/16 and 2016/17 versions.

So to edit all years of the above programme to run in 16/17 you would:

- Create a split for 14/15 (this will pull in the current year 3 structure)
- edit year 3 of the 14/15 entry cohort version
- create a split for 15/16 (this will pull across the revised year 3 structure)
- edit year 2 of the 15/16 version
- create a split for 16/17 (this will pull across the revised year 2&3 structures)
- edit year 1 in 16/17 to complete the changes
STEP 4: Editing your programme structure

Once you have created the new version of your programme you will notice that some editing buttons appear on the structure screen:

- **Edit this Year** –
  This will take you to a screen where you can edit the:
  - mode of study, i.e. full time or part time (displayed in the Programme Catalogue)
  - Study Block (year of study as displayed in the Programme Catalogue)
  - credit points required to progress (displayed in the Programme Catalogue and used to work out which units in the structure are mandatory or optional)
  - Stage notes that will appear above the structure for that year in the programme catalogue.
    - This section is used to identify which units in the structure are classified as ‘must pass units’. When adding the text, please link to the definition of must pass units in the Code of Practice by using the following format text which will correctly insert a hyperlink:
      
      For the definition of must pass units please see the [[Glossary of Terms]] from Annex 1 to the Regulations and Code of Practice for Taught Programmes.
    
- **Edit the structure of this Year** –
  This will take you to a screen where you can add or delete a unit, add a list of units, add shared programme structures, add open credit points and add a comment:
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- **Add Unit** – when you click on this link the System will automatically add a new “Unknown Unit”. Either click the “Edit” button on the right hand side or double click where it says “UNIT” to enter your unit code. Type in your unit code in capitals ensuring that there aren’t any spaces in or around the code, and then click away from the editing box (you don’t need to hit “Save” yet). If you then click on your new unit and hold the cursor down you can drag your new unit into your structure.

- **Add Shared Structure** – when you click on this link the System will automatically add a new “Unknown Shared Structure”. Either click the “Edit” button on the right hand side or double click where it says “CODE” to enter the shared structure code. Type in the code in capitals, and then click away from the editing box (you don’t need to hit “Save” yet). If you then click on the shared structure and hold the cursor down you can move it to where you want it to appear in the programme structure. **Note that just the title of the shared programme structure appears on the edit screen. Once you hit save you will be taken out of the edit screen and the units within the shared programme structure will be shown in the full programme structure for that year.**

- **Delete units and shared programme structures** – to delete a unit or a shared programme structure select “Delete” on the right hand side of the screen. Remember, there is currently no ‘undo’ function so make sure you select the correct unit. However, if you do make an error, hit ‘cancel’ at the bottom of the page instead of ‘save’ and you can start your edits again.

- **Create or remove lists of units** – the default text for a new blank list is “Select from:” with a value of 40 credit points. To edit either click “Edit” on the right hand side of the screen or double click in the text field. You can then change the list heading and the required credit points. Once you click away from the list the changes will appear and you can drag and drop units into the list as instructed above.

- **Add open units** – will automatically add “OPEN: Choose open units” to your structure. To edit, either click “Edit” on the right hand side or double click in the text field. You can drag and drop open units into an optional unit list.

- **Add comments** – will automatically add a new comment field to be edited. Comments will always be displayed in *italics*. As a general rule your programme structure should be clear to students without requiring comments but there may be occasions where these are necessary. Please use sparingly.

**Please note:** If you want to add new units to your programme, you will need to read the Guidance Notes on Creating a New Unit on the [Unit and Programme Management System home page](#). The unit will need to have previously been approved and set up, i.e. assigned a SITS unit code, or will need to be set up as part of this proposal to be able to add it to programme structures. When you set up a new unit you will need to make a note of the temporary code assigned by the System in order to add that unit to your programme.

c. **Delete this Year**

As the name suggests, this deletes the year of the programme. It is not expected that this functionality will be used very often. If you do delete the year of a programme please note that there is no ‘undo’ button so you would have to create it from scratch if you wanted to put the year back.
STEP 5: Editing your programme specification

When amending your programme you should also check and update your programme specification which includes information on your programme organisation, aims, learning outcomes and additional information.

When you click on your programme you are automatically taken to the “Structure” tab, but you will also notice other tabs along the top of the screen.

Click on one of these to view the information and click on the “Edit...” links where required.
STEP 6: Entering ‘approval’ information

Level of Approval required

The relevant Faculty Education Director (FED) should have decided if a change to a programme requires School/Faculty or an extra stage of University approval within the context of assessing the potential risks to the University. In terms of the approval forms and workflow, the UPMS defaults proposals to those requiring school/faculty approval. If the FED has deemed a proposal as high risk, the ‘Workflow Override’ switch should be used to generate the more detailed approval forms and workflow to University Education Committee (see below).

1. School/Faculty approval

When you edit any programme structures you also need to fill out some approval information explaining the revisions to the programme.

Click on ‘Approval Form’ in the left hand menu. The approval form is held at proposal level and the link appears under this section of the menu bar.

This takes you to the default approval form pictured below. Click ‘edit’ to complete your approval information. Click ‘save’ when you are ready to save the details.

If you need to format your text you need to use html formatting – please select the drop-down ‘show help’ for further information.
2. University approval

If the FED has deemed that the proposal requires University level approval, or that the faculty wishes to see a fuller rationale, the ‘workflow override’ switch should be used.

Click on the yellow button with UNIVERSITY on it and you will see that the sentence above changes to ‘This proposal has University Level Changes for workflow purposes.

By clicking back into ‘Approval Form’ you will see that a number of tabs have appeared. All of these sections must be completed before the proposal can be submitted.

STEP 7: Submitting your proposal

Once you are happy with the changes you’ve made to your unit(s), click on the link to ‘Submit Proposal’.

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...and you should then hopefully see a screen telling you that no errors have been found. If you do get an error or a warning, there will be a link in the Description field to take you to the part of your proposal that requires completion.

Click on ‘Submit Proposal’ and you will then be taken to a new screen that displays the approval workflow details. You can see that the proposal has been successfully submitted and the approval form completed and this is now awaiting approval by the School Committee.
For further information on the workflow process please see the Guidance on Committees and Workflows.

Once approved, the changes will then be applied directly to SITS and the Unit and Programme Catalogues for the relevant academic year.
Hints and Tips for Navigating the System:

Permissions:

Any proposal that you create will only be visible to yourself, unless you give another user access. You can do this by setting up ‘Permissions’.

Once you have created your proposal, you should see a link in the left hand navigation to ‘Permissions’. When you click on this you will be able to search for a colleague by surname or username and then select to give them permission to your proposal. That user will then be able to add, edit or remove units from that proposal.

My Proposals

Lost your proposal? When you next login, go to My Proposals from the home page and you can search for your proposal by a name, reference, faculty, and so on.

Workflow Details

A quick way to view where your proposal has got to in the approval process is in the Workflow Details in your proposal. This will be a diagram displaying each step through the approval process. Here you will be able to see where your change has been approved, if it’s awaiting approval and if it your changes have been successfully applied to the Unit and Programme Catalogues and SITS.

Inactivity

Please note: The system will automatically log you out if you remain inactive for more than half an hour so please ensure that you save changes as you make them.

Moving items between proposals

When in the contents page of your proposal you are able to select items using a tick box and then there is an option to ‘Move’ items to other proposals. Please note however that this does not copy the items, it will delete them from the current proposal and add them to the new one.

Getting Help

If you have any technical problems with the system, please email approval-help@bris.ac.uk