Guidance on Setting up a New Programme using the Unit & Programme Management System (UPMS)

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

Please note that only users with the Programme Editor role can edit new and existing programmes. In addition, new programmes will need to be initially created by the Academic Quality and Policy Office (AQPO) who will set up the foundational information of the programme.

New programmes require a large amount of information in order to be approved. It is advised that you refer to the Programme Approval Policy and other information on the AQPO website and gather the majority of required information before setting up the programme in the Unit & Programme Management System (UPMS).

Programme editors will not be able to submit a new programme proposal unless all of the required approval information has been completed.

There are 6 steps to creating a new programme:

**STEP 1: Create a New Programme in liaison with the AQPO**

**STEP 2: Logging in to the system and setting up a new proposal**

**STEP 3: Setting up the Programme**

**STEP 4: Adding any other unit/programmes changes**

**STEP 5: Entering ‘approval’ information**

**STEP 6: Submitting your proposal**

Hints and Tips for Navigating the System

**STEP 1: Create a New Programme**

The initial setting up of a new programme needs to be completed by a member of the Academic Quality and Policy Office (AQPO). Please contact members of the individually by telephone or email approval-help@bristol.ac.uk.

Once the AQPO has set up the new programme they will contact the relevant people (e.g. school programme editor and Programme Director) to ensure that everyone knows which proposal to work in.

**STEP 2: Logging in to the system and accessing proposal**

To access the UPMS, please go to www.bris.ac.uk/esu/approvalprocess.

You will need to login using the link in the left hand navigation bar. Please enter your University of Bristol username and password.
The first thing you need to do is find the relevant proposal. AQPO will have told you which proposal to use (or, if you had already set up a proposal will have worked with you to ensure the new programme was set up within that 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 (new programme, new units, changes to units, withdrawals etc).

Click on ‘My Proposals’ and then select relevant proposal.

Note: If you are setting up new units within the new programme you must include them in the same proposal. Please do not set up new units in a separate proposal otherwise they cannot be attached to the new programme.
STEP 3: Setting up the Programme

Once the basics of the programme have been set up by the AQPO, you will be able to view the blank new programme specification where you will need to complete the details of the programme structure as well as the specification information:

Programme structure:

For full details on how to edit these sections, including adding new shared structures and working with versions, please see the guidance notes on editing a programme and using shared programme structures - http://www.bris.ac.uk/academic-quality/approve/onlineapprovaltool/
STEP 4: Adding any other unit/programmes changes

Once the new programme is set up make sure the proposal contains all relevant items: new units, changes to units/programmes and withdrawals of programmes/units. Guidance documents on how to deal with all of these things within the system is available at [http://www.bris.ac.uk/academic-quality/approve/onlineapprovaltool/](http://www.bris.ac.uk/academic-quality/approve/onlineapprovaltool/).

STEP 5: Entering ‘approval’ information

Full approval information and links to supporting documentation for the new programme must be provided within the system.

From the proposal home page click on ‘Approval Form’ in the left hand navigation box:

You will need to complete all of the fields in each tab in order to submit the proposal. This includes uploading documents under the support tab.

You can upload Word, Excel and pdf documents. If you need to update a previously uploaded document use the same function and it will overwrite the original saved document.

Make sure you remember to attach the Critical Friend Report and Business Case in the Supporting Details section which can be navigated to from the menu on the left hand side of the screen. Here you can also add the name of the Academic Lead, which will appear on the coversheet of the proposal documentation.

If you need to format your text you **should** use html formatting – please select the drop-down ‘show help’ for further information.
STEP 6: Submitting your proposal

Once you have set up the programme and have completed all of the approval information, click on ‘Submit Proposal’.

...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.

If no errors were found click on ‘Submit Proposal’ and the proposal is submitted and you will be taken to a new screen called that displays the approval Workflow Details.

You can now 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 Notes on Committees and Workflows.

Once fully approved, the changes will automatically be applied 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 a proposal has got to in the approval process is in the Workflow Details. This is a diagram displaying each step through the approval process. Here you will be able to see where a proposal has been approved, if it's awaiting approval and if it has 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