

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

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

There are 7 steps to setting up a new unit:

[STEP 1: Logging in to the system and setting up a new proposal](#)

[STEP 2: Creating a new unit and entering the unit information](#)

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[STEP 4: Entering 'approval' information for your new unit](#)

[STEP 5: Adding the new unit to a programme](#)

[STEP 6: Creating more new units as part of the same proposal](#)

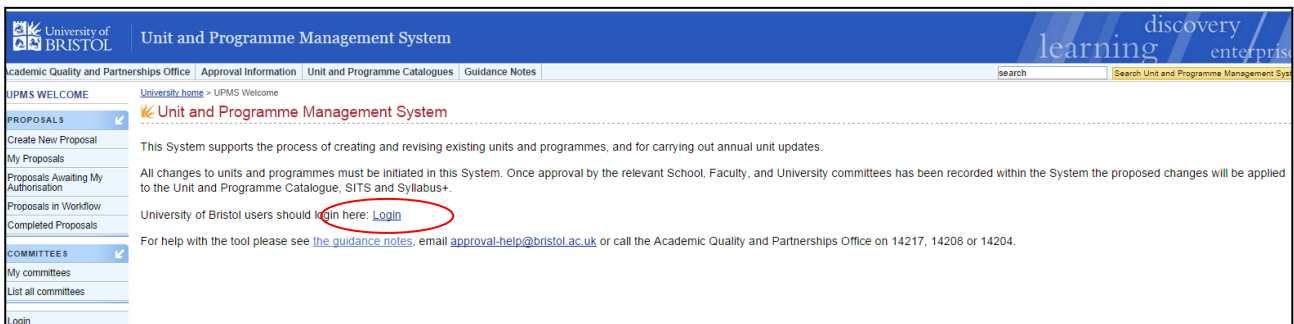
[STEP 7: Submitting the proposal](#)

[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>.

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



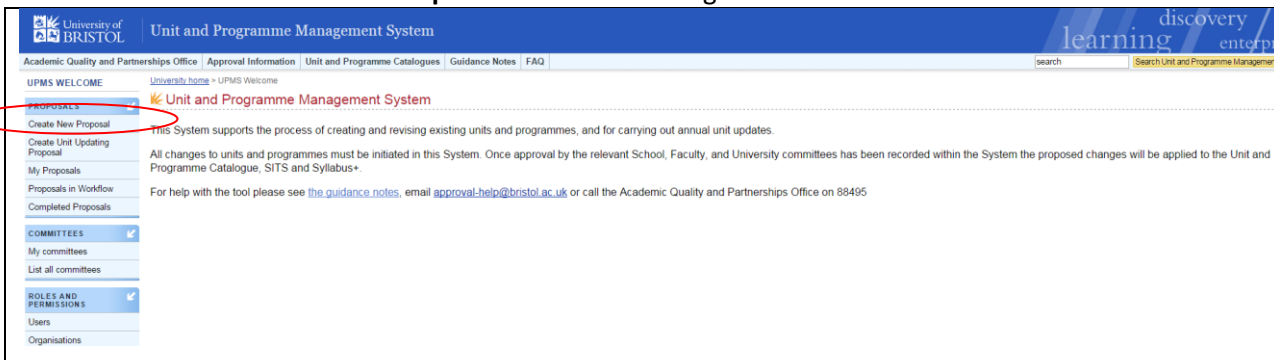
The first thing you need to do is set up a new proposal. You can either:

- Set up one proposal for all your new units which you only submit once all of your new units have been created, OR
- Set up different proposals for different groups of new units.

Please note that if your new unit will be attached to more than one programme, you should edit all of those programmes as part of the same proposal rather than as separate ones.

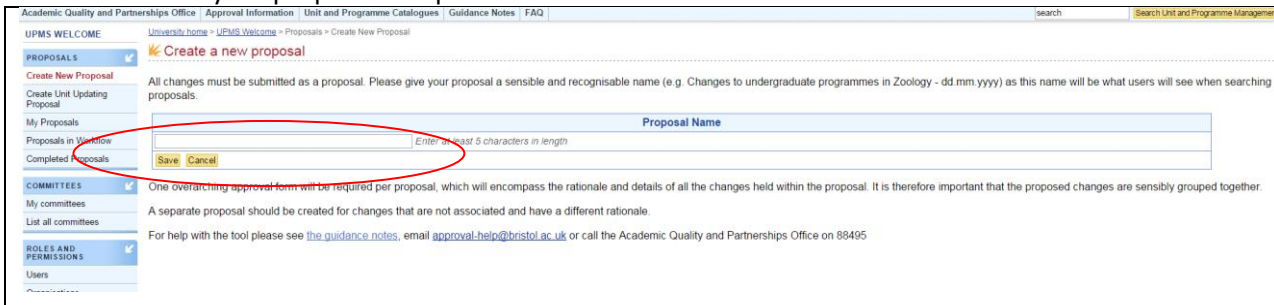
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1. Click on 'Create New Proposal' in left hand navigation bar



The screenshot shows the 'Unit and Programme Management System' interface. The left-hand navigation bar has a red circle around the 'Create New Proposal' link. The main content area displays the title 'Unit and Programme Management System' and a brief description of the system's purpose. The navigation bar includes links for 'PROPOSALS', 'COMMITTEES', and 'ROLES AND PERMISSIONS'.

2. Name your proposal and press save.



The screenshot shows the 'Create a new proposal' form. The 'Proposal Name' input field and the 'Save' button are circled in red. The form includes a text input field with a placeholder 'Enter at least 5 characters in length' and a 'Save' button. The main content area provides instructions on how to name the proposal and a warning about overlapping approval forms.

Your proposal name can be anything you want, though please bear in mind that this will be the name as it goes through the committee structures so should be something clear and relevant.

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STEP 2: Creating a new unit and entering the unit information

Once you have created your proposal folder, you will see options appear on the left hand side of the screen, one of which will be 'Create New Unit':

The screenshot shows the 'UPMS WELCOME' page with a navigation menu on the left. The menu items are: PROPOSAL NEW PROPOSAL, Rename Proposal, Support Documents, Print, Major Minor Override, Permissions, Unwatch Proposal, Delete Proposal, Units, by Faculty, A-Z list, Create New Unit (circled in red), Programmes, by Faculty, A-Z list, Shared Structures, and by Faculty. The main content area displays the title 'Contents of New proposal (ref: w7lfdb)' and several paragraphs of text providing instructions on how to manage the proposal, including how to search for units and how to set up a new unit or programme.

'Core' unit information – the first screen requires you to enter:

- School that the unit will be owned by*
- Unit Title
- Credit points
- Level of study
- Year that the unit will first run
- If the unit feeds into the Key Information Set (KIS) data [every unit taught to undergraduates]

* Please note that the School code you enter will determine the Unit Code that the System will automatically assign the unit once it has been approved. Please see the list of SITS codes to use found [here](#)

The screenshot shows the 'Create a New Unit' form. It has a table-like structure with the following fields:

Dept or School Code	<input type="text"/> The four letter organisation code.
Title	<input type="text"/>
Credit Points	<input type="text"/> 1 credit point normally equals 10 hours total student input (including study, revision and exams)
Level of Study	Level C/4 <input type="text"/> For further information on levels please see national level descriptors
Academic Year	2014/15 <input type="text"/>
Should this unit provide data to KIS?	<input type="radio"/> Yes <input type="radio"/> No All units offered to undergraduate students should be included.

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a note: 'Press 'Save' to record your entries'.

Once you've entered the core unit information, click on the 'Save' button.

- a. **Unit details** – the second screen you are taken to is where you enter the rest of your unit information, such as the description, assessment details and teaching block(s), etc. You can also re-edit your department, level and credit points on this screen if required.

Click on the "Edit" button at the bottom of the unit page:

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New Specification for DRAM2NEW1

Unit Title	New Drama Unit
Credit Points	10
Level of Study	Level I/5
Dept or School Code	DRAM (DRAM for assigned code)
School or Department	Drama: Theatre, Film, Television
Faculty	Faculty of Arts

2014/15-Onwards

Details for Academic Period 2014/15-Onwards

Please note: the following information will be displayed in the publicly available unit catalogue

Unit Director	Change Unit Director
Is Open	No
Is Running	No
Description including Unit Aims	
Pre-requisites	
Co-requisites	
Intended Learning Outcomes	
Assessment Information	
Teaching Information	
Reading and References	
Teaching Block	

[Edit](#)

Once you've entered your unit details, click on the **'Save'** button.

Note: You do not need to enter all unit information straightaway – you can save and come back to it. However all fields are mandatory and will require completion before you can submit your proposal.

You will see that the System has assigned a temporary unit code for your new unit, e.g. DRAM2NEW1, which is the units' unique ID within this proposal folder until the unit is submitted and approved. You will need to make a note of this temporary code in order to attach the unit to a programme/shared programme structure (see STEP 5).

When the unit has been approved at School level a SITS code will be assigned. Please see the guidance notes on the committee process on the [Unit & Programme Management System Home Page](#).

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STEP3: Changing the start year for your new unit

If you initially set up your unit to run in 15/16 but it is then decided not to run the unit for the first time until 16/17, you can change the start year by selecting 'All Versions' and selecting start later:

You will be taken to a screen with a table of academic years and unit versions. For a new unit there will be only one version for a new unit, i.e. '2014/15 onwards'. In this screen you can also delete a version of a unit, though you can only use this functionality to delete a new version that you have created but no longer want. You will not be able to edit or delete historic data, including the current year's information.

DRAM2NEW1		Year	Version	Split	Delete	Start Earlier	Start Later
Details		2012/13	# 2012/13-2012/13		delete	start earlier	
Included in Proposals		2013/14	# 2013/14-Onwards		delete		start later
Taught on Programmes		2014/15		split			
Approval Form		2015/16		split			
All Versions		2016/17		split			
Revision History		2017/18		split			
Print		2018/19		split			
Edit Next Academic Year		2019/20		split			

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STEP 4: Entering 'approval' information for your new unit

As well as entering the unit details, you will also need to provide 'approval' information for your new unit. If your proposal includes any other change these all need to be covered by the same approval information. The approval information is normally the academic rationale for the changes (see below) unless the change requires University approval when further information is required.

To get to the approval information go to the proposal home page and select 'Approval Form' from the left hand side of the screen:

The screenshot displays the 'Approval Form' interface. On the left, a navigation menu lists various options, with 'Approval Form' circled in red. The main content area is titled 'Rationale' and features a section for 'Academic Rationale' with the following instructions:

- Please provide full details of the rationale for the proposed new, amended or withdrawn units, programmes or shared structures.
- Please explain if the proposed changes have any implications for other programmes (e.g. associated joint honours programmes)
- If proposing new or amended programmes, please expand on the rationale in the business case and include reference to why the proposal is desirable and timely. Please ensure that the timing of the change to the programme is clear.

Below the instructions is a large text input field. At the bottom of the page, there are 'Save' and 'Cancel' buttons, and a note: 'Press 'Save' to record your entries'.

Select "Edit" to allow the screen to be edited, and then 'Save' once you have completed all of the fields. If you need to format your text you need to use html formatting – please select the drop-down '[show help](#)' for further information.

As with the unit information, the approval information can be edited at a later date.

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STEP 5: Adding the new unit to a programme or shared programme structure

All new units must be attached to one or more programmes. This is a function that only UPMS Programme Editors can carry out to avoid multiple changes to programmes being carried out in separate proposals. If you are not a UPMS programme editor please contact the relevant person in your school ([see current list](#)). You will need to give your programme editor your proposal reference code and/or title so that they can find it easily.

Programme editors: For guidance on how to edit programme structures, please see the guidance notes on [Updating Programmes](#).

STEP 6: Creating more new units as part of the same proposal

The System requires you to always be within a proposal to create new, or edit existing, unit information. Therefore to add another new unit to an existing proposal, make sure you are in the right proposal (go to 'My Proposals' and select the proposal you are working on) and then repeat steps 2 to 5

If you have created a new unit as part of one proposal but would like it to be submitted as part of a different proposal, please see Hints and Tips below on how to move items between proposal folders.

STEP 7: Submitting the proposal

Only a programme editor will be able to submit the proposal once a new unit has been added to the relevant programme structures (see step 5).

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Hints and Tips for Navigating the System:

Permissions

Any unsubmitted proposal folder 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 folder. That user will then be able to add, edit or remove units from that folder.

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

Once you have submitted your proposal, 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 proposal folders

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

Help and queries

If you have any technical difficulties, please email approval-help@bris.ac.uk