
Guidance on Committees and Workflow in the Unit & Programme Management System (UPMS)

These guidance notes will tell you about the Committee and Workflow screens in the UPMS.

There are 7 areas associated with the committee screens:

[1: Logging in to the system and navigating to your committee](#)

[2: Adding members to your committee](#)

[3: Viewing and Printing proposals](#)

[4: Approving proposals, updating the status and re-editing](#)

[5: All Outcomes](#)

[6: Outstanding proposals and using the Workflow Details](#)

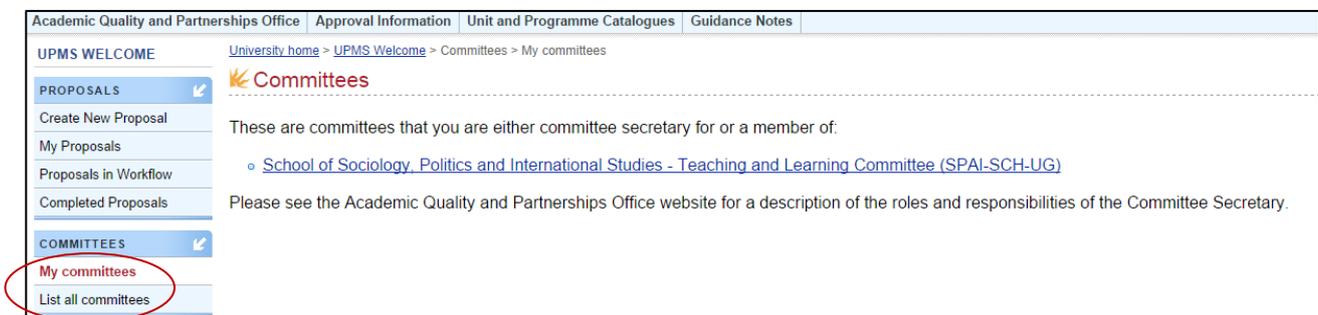
[Hints and Tips for Navigating the System](#)

1: Logging in to the system and navigating to your committee

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.

From the home page you can go straight to your committee page by clicking on “**My Committees**” –



When you click on the link you will be taken to the ‘home’ page for that committee.

2: Adding members to your committee

Committee members: To add new committee members, simply click on ‘**members**’ on the menu on the left of the screen then click through to ‘add new committee member’ and add the member by searching the surname or username.

Once added, these individuals will now see the committee appear in their ‘My Committees’ page.

NOTE: Committee members do not have any editing rights by; it is simply a way of recording members and giving them easy access to proposals via the committee’s screen.

Committee Secretary: to change or add an additional Committee Secretary, please send a request by email to approval-help@bristol.ac.uk. The Committee Secretary has editing rights and has overall responsibility for recording approval decisions.

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3: Viewing and Printing Proposals

The main section of the Committee homepage indicates how many proposals are awaiting an approval decision. You can view these proposals by selecting 'outstanding proposals' from the left hand menu.

Academic Quality and Partnerships Office | Approval Information | Unit and Programme Catalogues | Guidance Notes

UPMS WELCOME [University home](#) > [UPMS Welcome](#) > [Committees](#) > School of Sociology, Politics and International Studies - Teaching and Learning Committee

SCHOOL OF SOCIOLOGY, POLITICS AND INTERNATIONAL STUDIES - TEACHING AND LEARNING COMMITTEE

✦ **School of Sociology, Politics and International Studies - Teaching and Learning Committee**

The Secretaries to this committee are [Janet Woolway-Allen](#) [Sadie Drummond](#) [Matti Punt](#) [Sophie Billings](#)

There are 4 proposals requiring approval.

To record an approval decision against the outstanding proposal, select [outstanding proposals](#) from the menu on the left.

Outstanding proposals
All Outcomes
Members
Past Members

Proposals that are conditionally approved are listed here until it is recorded that the conditions have been met.

1. Click on the link to the proposal
2. You will then see the contents page for that proposal listing which units and programmes have been edited (see below)

Academic Quality and Partnerships Office | Approval Information | Unit and Programme Catalogues | Guidance Notes

UPMS WELCOME [University home](#) > [UPMS Welcome](#) > Proposal SPAIS New Proposal Sept 2014

✦ **Contents of Proposal SPAIS New Proposal Sept 2014 (ref: w7ladq) (Faculty change)**

UNITS

<input type="checkbox"/>	SPAISNEW1 - Unit in Politics (new unit)
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PROGRAMMES

<input type="checkbox"/>	9POL006U - Politics (BSc) (programme updating) (edited in another proposal)
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Unit updating - Mech Eng 30 Jan 14

3. Choose 'Print' from the left hand menu
4. Select everything you want to look at
5. Select whether you want to print more than the most recent version
6. Then select the yellow 'Print' box.

This will bring up a pdf of the proposal showing all changes to units and programmes as track changes.

NOTE: This is the best way to view a full proposal and see what changes have been made.

The coversheet will list all the programmes that are affected by a 'shared programme structure' within the proposal.

Proposals that require Education Committee approval include further documents in addition to the new/revised specifications and approval forms that are printed as the main pdf. You will need to click onto the attachments from the relevant page on the pdf (pictured below), or from the supporting documents page (pictured below), to view and print these.

The additional items are:

1. Report of the Critical Friend (found on page one of the pdf)
2. External References (found within the approval information in the pdf)
3. Student Consultation Report (found within the approval information in the pdf)

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The **Report of the Critical Friend, External References and Student Consultation** must be scrutinised by the School and Faculty Committees, and proposals without this important document are not ready for approval.

Proposal Information for Business Studies - Updating units Oct 14	
Proposal created/edited by	Jo Strong
Lead Academic	Professor Judith Squires
Business Case	Business Case
Critical Friend Report	Critical Friend Report
Supporting Document	Supporting Document

UNITS

- LAWD10007 - Foundations of Business Law
- EFIM20005 - Management Science

The proposal pictured above also includes a further **supporting document** which should be included with the paperwork for committee scrutiny. Not all proposals will include this.

Please note that the **Business Case** is saved in this section of the System but it is not required to be scrutinised by the School or Faculty Committee so there is not need to print this for circulation.

The **external references and student consultations** can be found further down the pdf that has been printed to your screen. Simply click onto the attachments and seperate documents will be opened. An example is pictured below.

Support for Programme
External Support Please provide reports from two external academics of recognised standing (one of whom may be an existing external examiner) on the rationale and suitability of the submission.
External Support 1
External Support 2
External Assessors Please explain why the external assessors chosen are appropriate to this particular proposal. Dr Smith is external examiner for current programme and Dr Jones is a leader in his field.
Response to External Assessors Please provide an evaluation and response to the reports received from the external assessors. It is essential to cover any questions or perceived difficulties raised by the externals. Responses should be sent to the externals, and any further comments from them should also be included with this form. If the proposal has been modified in response to the external assessors' reports, please indicate how it has been changed. Both gave very positive reports.
Professional Body Scrutiny What scrutiny has been undertaken by professional bodies? None required
Student Consultation Please complete the student consultation template (www.bristol.ac.uk/esu/approval2013/formsbank.html) and attach Student Consultation
If you have any further comments on the student consultation, please add them here. N/A

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4: Approving proposals, updating the status and re-editing

From the 'outstanding proposals' screen you will be able to record the committee and any relevant joint school/faculty committee decisions;

Proposal	Ref	Created By	Date Submitted	Comments (emailed to Proposer)	Status	Change Status
Management changes Dec 2013	m3y9d	John McCormack	06/12/2013		No Decision	<input type="checkbox"/>
New Unit GERM Y2 Spotlights SD	e7p5ks	Rachel Wilson	18/12/2013		No Decision	<input type="checkbox"/>
SPAIS New Proposal Sept 2014	w7ladq	Sophie Billings	09/10/2014	Approved with conditions on 01/10/2014: assessment needs to be clearer	Conditionally Approved	<input type="checkbox"/>
Test_lo	uscbzs	Jo Purdie	09/10/2014	yes	Conditionally Approved	<input type="checkbox"/>

1. Tick the 'change status' box
2. Update the status to either 'approve', 'approve with conditions' or 'reject'.

Approve

Once approval has been received from every relevant committee (i.e. the joint schools for joint honors programmes) this option can be selected and the proposal will then move to the next stage in the workflow. The following wording should be used in the comments field;

- a. **Approved:** 'Proposal approved at Committee meeting dd/mm/yy' or 'Proposal Approved by Chair's Powers on dd/mm/yy'
- b. **Approved (Joint Honours):** ' Proposal approved by SCHOOL.1 Committee meeting dd/mm/yy; SCHOOL.2 by Chair's Powers on dd/mm/yy; SCHOOL.3 meeting dd/mm/yy' (**note: the school names must be specified**)

Approve with conditions

This proposal will not progress in the approval workflow until full approval has been given. The comments will be emailed to the proposer; they should therefore inform the proposer why their proposal was not approved and instruct them on the action required. The following format should be used;

- a. **Approved with Conditions:** 'Proposal approved at Committee meeting dd/mm/yy/by Chair's Powers on dd/mm/yy with the condition XXXXXXXX' (**note: the condition for approval must be specified**)
- b. **Approved with Conditions (Joint Honours):** 'Proposal approved by SCHOOL.1 Committee meeting dd/mm/yy; and SCHOOL.2 by Chair's Powers on dd/mm/yy. SCHOOL.3 approved the proposal at meeting dd/mm/yy with the condition that XXXXXXXX' (**note: the condition for approval must be specified**)

Once this option is selected it becomes possible for the proposer (or anyone else with permissions to that proposal) to re-edit the proposal and make the amendments required for approval by the committee. The proposer must then inform you as Committee Secretary that the changes have been made and, following discussion with the Chair, you can then update the status to '**Approved (conditions met)**' with the relevant approval dates using the format provided in sections a-b above, or Rejected.

Reject (with comments)

This option will take a proposal completely out of the approval workflow. Please be very sure you want this option as it will mean that the proposer would have to start from scratch to re-do the proposal.

Please note that once you have updated the status this cannot be undone.

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5: All Outcomes

If you need to refer back to the outcomes of the Committee's decisions, you can do so by navigating to the 'All Outcomes' screen. This will display the outcomes from every meeting that Committee has held and the approval outcome:

Proposal	Recorded on	Outcome	Workflow Status	Comments (emailed to Proposer)
CR003621 - changing programme code	25/08/2011	APPROVED	Check Approval Forms	
Changes to units in BIOC - for training	10/11/2011	APPROVED	Awaiting approval from 2 authorisors at stage 'All Signatures Required'	
Test 003953 - email prompt new PWY code	16/11/2011	APPROVED	Assign Programme Code For New Programmes	Send to PAG
testing_Med&Vet proposals	29/11/2011	APPROVED	Awaiting approval from 2 authorisors at stage 'All Signatures Required'	
Committee testing - MVFAC 15/11/11	29/11/2011	APPROVED	Awaiting approval from 2 authorisors at stage 'All Signatures Required'	
Testing 8Feb12	16/05/2012	APPROVED	Awaiting approval from 1 authorisors at stage 'All Signatures Required'	
testing on 28/11/12	28/11/2012	APPROVED	Awaiting approval from: [Education Committee]	ALL FINE
some major changes for 13/14	15/07/2013	APPROVED WITH CONDITIONS	Awaiting approval from: [Medical and Veterinary Sciences Faculty - Undergraduate Studies Committee]	new unit needs more info

All Outcomes lists all proposals that have been through the committee. The view is split into proposals that are not yet fully approved and are **still in the workflow** and proposals with **outcomes completed**.

6: Outstanding Proposals & using the Workflow Details

If you have any proposals that are awaiting an approval decision or that have been approved with conditions, these will appear in the Committee 'home' page under the heading "Outstanding Proposals". These proposals will not progress to the next stage of approval workflow until the status has been updated.

A helpful screen to regularly refer back to is the Workflow Details for a specific proposal. You can navigate to this by selecting a proposal and then you should see a link to Workflow Details on the left hand side. This will tell you what stage a proposal has to go to in the approval workflow.

In the following screenshot you can see that this proposal is waiting for School Committee approval before it can progress onwards to Faculty and Education Committees.

Stage	Start	End	Detail
Submitted	08/10/14	08/10/14	SUCCESS
Check Approval Forms	08/10/14	08/10/14	Approval Forms Valid
School Committees	08/10/14		Awaiting approval from: Law School Committee School of Chemistry - Undergraduate Teaching Committee School of Physiology & Pharmacology - Undergraduate Teaching Committee
Assign Unit Codes For New Units			2 units are awaiting codes: <ul style="list-style-type: none"> CHEM1NEW1 CHEM1NEW2
Faculty Committees			Medical and Veterinary Sciences Faculty - Undergraduate Studies Committee Science Faculty - Undergraduate Studies Committee Social Sciences and Law Faculty - Undergraduate Studies Committee
EDC			Education Committee
Apply to the Catalogue			

School Committee approval must be complete before the proposal can progress to the faculty for approval. The same applies at Faculty level for a proposal to Education Committee (where required).

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Hints and Tips for Navigating the System:

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.

Permissions

Prior to submission, a proposal will only be visible to the proposer unless another user is given access. This can be done by setting up 'Permissions'. Once a proposal has been successfully submitted into the approval workflow it can be viewed by everyone.

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 or authorisations and if 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 proposal. PLEASE NOTE that this does not copy the items, it will delete them from the current proposal and add them to the new one.

Help and queries

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