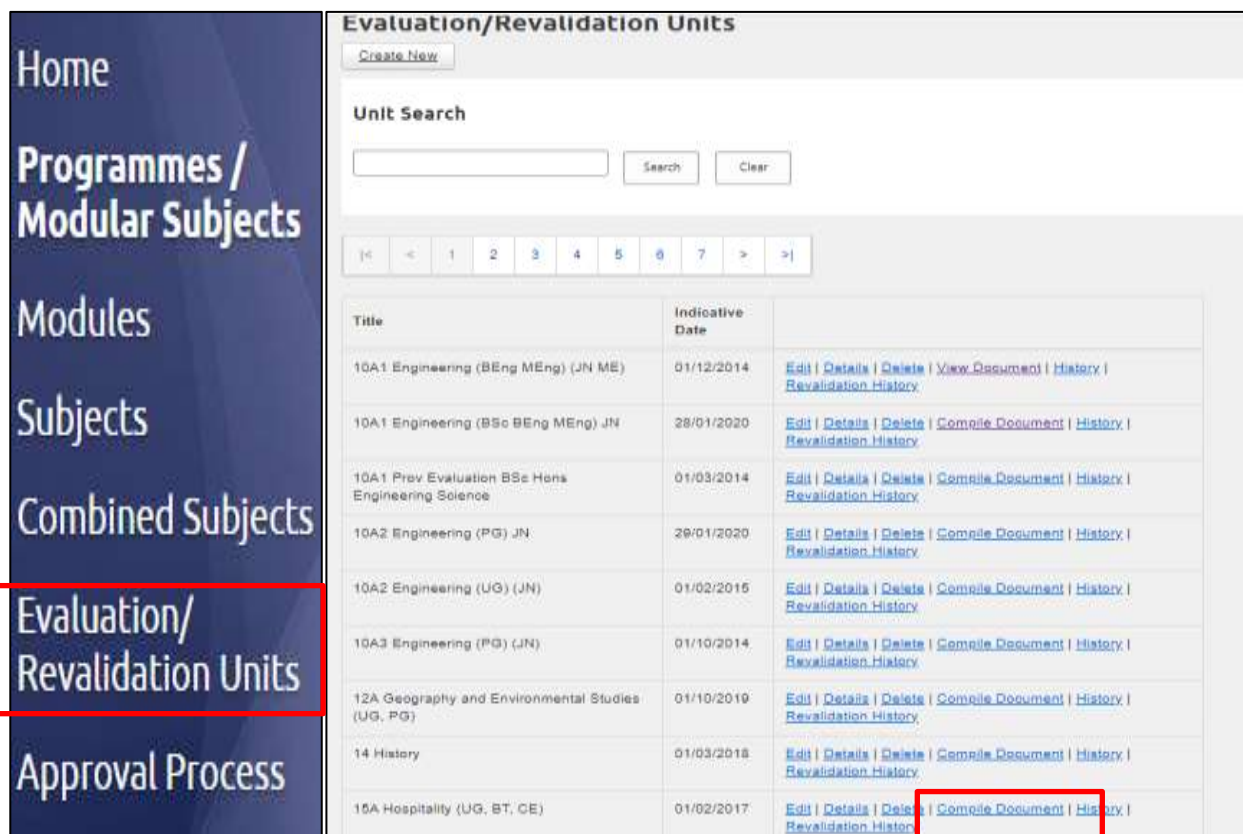


This guidance should be used alongside the Programme Approval, Management and Review (PAMR) Handbook, available on the Academic Office website at https://www.ulster.ac.uk/data/assets/pdf_file/0004/307822/PAMR-Handbook.pdf

The evaluation/revalidation process begins from the **Evaluation/Revalidation Units** area index – this process will allow you to compile and submit the course document. The Academic Office will have created a provisional Unit for your new course or a Revalidation Unit for existing provision. It can be viewed through the **Details** option. If the courses listed in the Unit need to be changed, contact the Academic Office. The **Indicative Date** in the Units index is indicative for the University event and not the actual date.

Before you can start the evaluation/revalidation approval process, the programme and module information must be available on the system and you must have all the other sections of the document ready to be uploaded.

Starting Evaluation/Revalidation



Title	Indicative Date	Actions
10A1 Engineering (BEng MEng) (JN ME)	01/12/2014	Edit Details Delete View Document History Revalidation History
10A1 Engineering (BSc BEng MEng) JN	28/01/2020	Edit Details Delete Compile Document History Revalidation History
10A1 Prev. Evaluation BSc Hons Engineering Science	01/03/2014	Edit Details Delete Compile Document History Revalidation History
10A2 Engineering (PG) JN	28/01/2020	Edit Details Delete Compile Document History Revalidation History
10A2 Engineering (UG) (JN)	01/02/2015	Edit Details Delete Compile Document History Revalidation History
10A3 Engineering (PG) (JN)	01/10/2014	Edit Details Delete Compile Document History Revalidation History
12A Geography and Environmental Studies (UG, PG)	01/10/2010	Edit Details Delete Compile Document History Revalidation History
14 History	01/03/2018	Edit Details Delete Compile Document History Revalidation History
15A Hospitality (UG, BT, CE)	01/02/2017	Edit Details Delete Compile Document History Revalidation History

Find your **unit** on the **Evaluation/Revalidation Units Index** – use the Search facility at the top of the screen. Click on **Compile Document**.

Compiling the Document

The next screen is where you compile your document. The CMS will generate the Programme Specification/s, Structure Diagrams for each mode of study and each exit award (B2); Module Descriptions (B4); and the Contribution table/s at the end of the Regulations (B3) from the information already input. These sections are ordered and paginated automatically and a contents page created for the Programme

Specification/s and Modules. You should ensure that the other sections below include page numbers in a similar format – A/1, A2; B1/1, B1/2; B3/1, B3/2; C1/1, C1/2; C2/1, C2/2 etc.

The other sections (A, B1, B3, C1 and C2) are uploaded from files held outside the CMS on your computer or elsewhere and found using the **Browse** function. You should include the evaluation or revalidation **title page** as the first page of **Section A**.

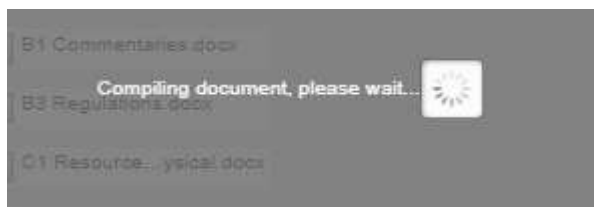
Additional files or supporting documentation in addition to the standard information can be uploaded through the **Other Files** option.

The compilation of the course documentation **must be carried out in one step** as the system will not allow you to proceed unless documentation has been uploaded to every section (A to C2 above).

You can only upload one document to each of these sections so all relevant information for each section must be compiled into one single document before you start uploading. You can upload either Word documents or PDF files.

Use **Other Files** to upload any other supporting documents – there can be more than one - then **Add**. If adding appendices or other documents, ensure that these are added in the order in which you want them to appear in the final document. Again, these can be Word documents or PDF files.

When all information has been added, click on **Compile Document** to save – the system will upload the documentation to SharePoint. (At this point all programmes/modular subjects and modules within the Unit will lock and show as 'Revalidating' on the relevant index i.e. 'Edit' will no longer be available.) You will be taken back to the **Evaluation/Revalidation Units Index**.



Depending on the size of the unit, you may see a message stating that the document is being compiled but do not click more than once.

(If you do not wish to proceed at this point, click on **Cancel** and you will be returned to the **Evaluation/Revalidation Units Index**. You can start the compilation process again at another time.)

Evaluation/Revalidation Units

[Create New](#)

Unit Search

15A

|< < 1 > >|

Title	Indicative Date	
15A Hospitality (UG, BT, CE)	01/02/202	Edit Details Delete View Document History Revalidation History

|< < 1 > >|

Find the **Unit** on the **Evaluation/Revalidation Units** index and click on **View Document**.

The next screen will display all the evaluation/revalidation files – the CMS generated sections and those which you have uploaded (the latter are now held in SharePoint).

Evaluation/Revalidation Unit
15A Hospitality (UG, BT, CE) - Aug-2019

Files

A - Introduction
[A Introduction.docx](#)

B1 - Commentaries
[B1 Commentaries.docx](#)

B2 - Specification
[B2 - Specifications](#)

B3 - Regulations
[B3 Regulations.docx](#)

B3 - Contribution
[B3 - Contribution](#)

B4 - Modules
[B4 - Modules](#)

C1 - Resources (Physical)
[C1 Resources Physical.docx](#)

C2 - Resources (Staff)
[C2 Resources Staff.docx](#)

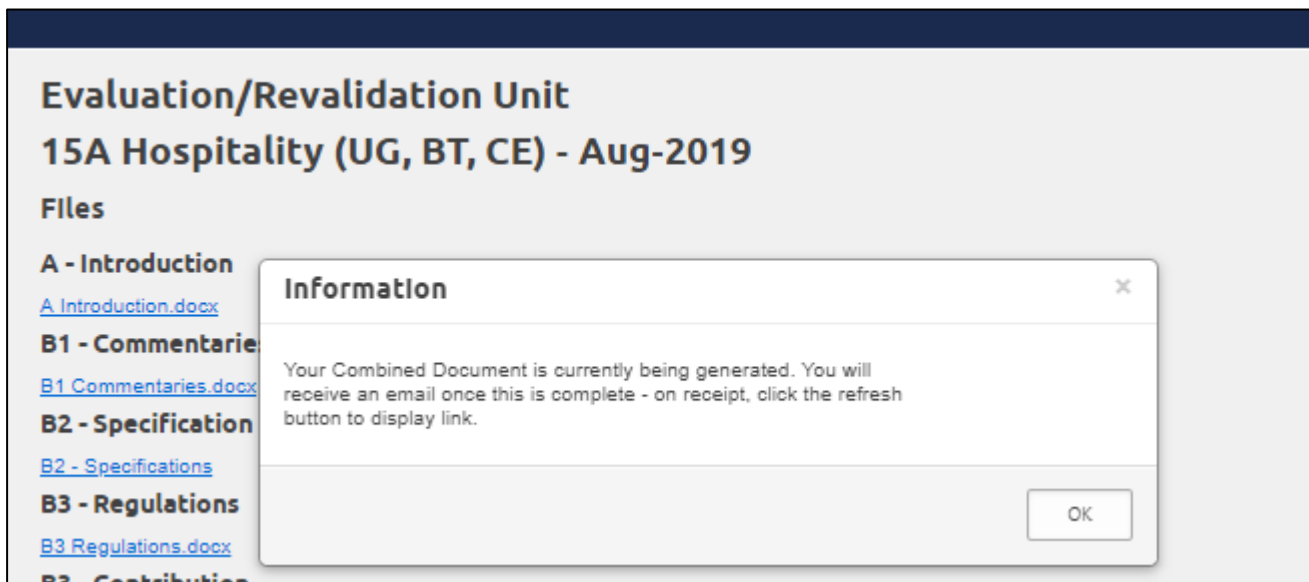
Other Files

Combined Document - All Sections

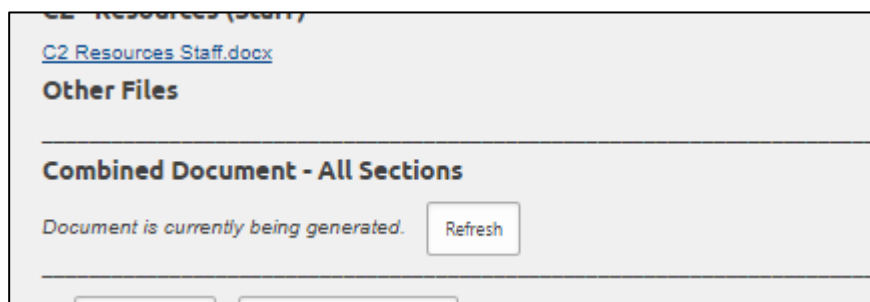
You now have several options as follows:
 (You should read each through before deciding how you want to proceed.)

- **Generate Document**

This will generate a complete document comprising all sections, including any **Other Files** which you have uploaded (e.g. appendices – these will appear in the order in which they have been uploaded). You will see a message notifying you that the document is being generated. Click on **OK**.



When it has been generated you will receive an email notifying you that the document is ready. You should then click on the **Refresh** button on the Evaluation/Revalidation Units screen. This will provide a link to the combined document.



If you need to make any changes once the document has been generated, you should **Cancel** (see page 6). This will cancel the process and take everything back to the start of the process and allow you to make further revisions before starting the process again, as on page 1. You can compile document and cancel as many times as you wish until the documentation is finalised and before you forward to an approver.

If you do not want to make any revisions, select **Request/View Feedback** or **Submit Approval** (guidance follows).

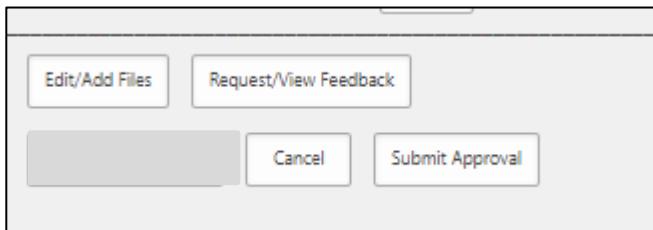
- **Edit/Add Files (making changes to uploaded files - Sections A, B1, B3, C1 and C2 and any additional documentation)**

If you wish to make changes to the other **uploaded files**, select Edit/Add Files. You will be taken to the SharePoint site where the system holds these files. Alternatively, you may wish to cancel the process, make the changes to these sections and then start the process again through **Compile Document** on the **Evaluation/Revalidation Units Index**. (The latter is recommended.)

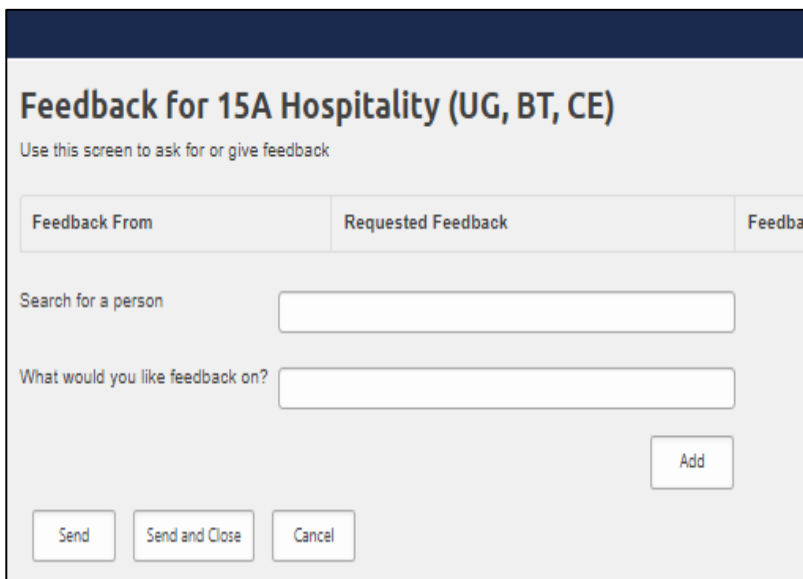
- **Request/View Feedback**

If you do not want to request feedback, and no revisions are required, go straight to **Submit Approval**.

To **Request Feedback** follow the steps below.



If you wish you can click on **Request/View Feedback** to ask for feedback from other staff before the document is submitted to the School/Faculty for final approval and submission to the Academic Office.



On the next screen, start to type the name of the relevant member of staff in the **Search for a person** field and select from the staff list which appears.

Insert details of the feedback being requested in the box provided.

To request the feedback from others, repeat this process and click **Add** each time. Feedback on different aspects can be requested from as many members of staff as you wish.

Click **Send** to forward the request/s and keep you on the feedback screen.

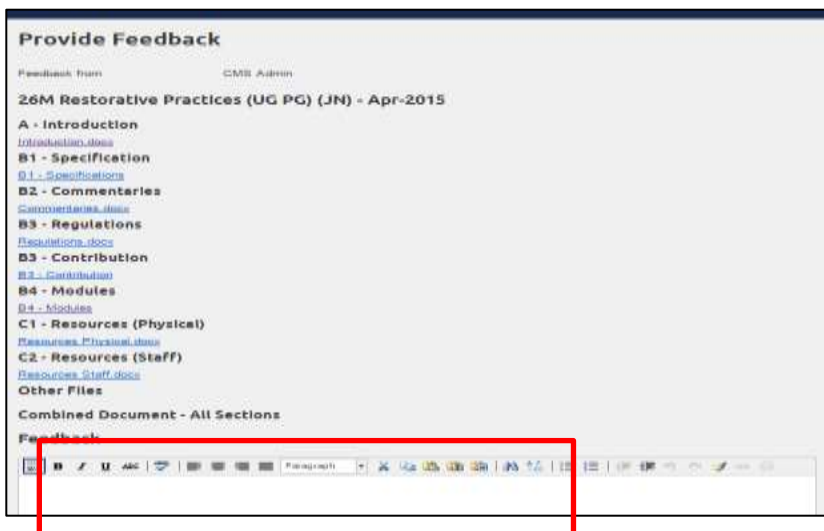
The member/s of staff will receive an email providing a link to where feedback/ comments can be provided. This link will also be visible on their own personal dashboard on the Home screen.

Selecting **Send and Close** will forward the request and return you to the Evaluation/Revalidation screen.

Selecting **Cancel** will return to the Evaluation/Revalidation screen and if you have not at any time selected either **Send** or **Send and Close** will cancel any feedback requested or staff inserted.

Details of feedback requested will display on a table when you select **Request/View Feedback** – this also shows if the feedback has been provided (completed).

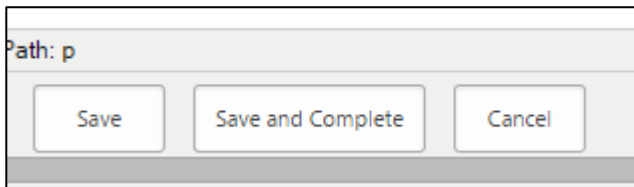
Providing Feedback (other staff)



The staff who have been asked to provide feedback receive a system generated email providing a link to the request.

Clicking on this link will take them to a screen where comments can be given.

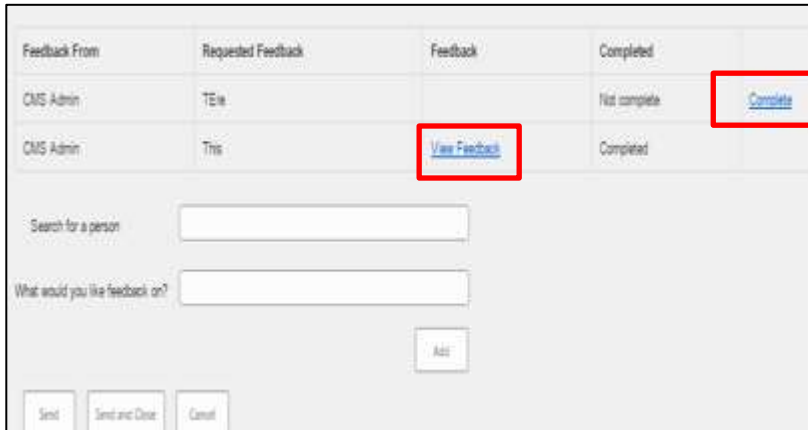
Insert the feedback/comments in the box.



Select **Save and Complete** to send your feedback.

Select **Save** to save the feedback and remain on the page without sending.

The originator will receive an email to notify them that feedback has been provided.



After providing and sending their feedback the member of staff will be taken to the feedback screen where they can see all feedback given (**View Feedback**) or outstanding on the request. The Complete option will only be available to the staff to whom that particular request has been sent.

If they wish they also have the option to forward a request to others.

If you need to **Edit** in light of feedback you should **Cancel** (as below) – this will cancel the validation process and take the process back to the start. When ready to restart the validation, you follow the process outlined on pages 1 - 4 as above.

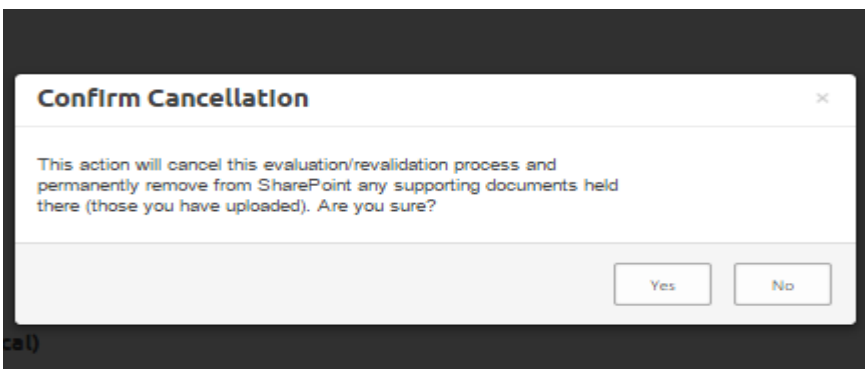
- **Submit Approval (go straight to page 7)**

If you have no changes to make and wish to start Faculty approval for the evaluation/revalidation, select **Submit Approval** (see page 7). The normal Faculty approval process should be followed (normally Head of School followed by the Executive/Associate Dean). The submission must have the Executive/Associate Dean's approval and it is they who will submit to the Academic Office.

- **Cancel**

If you have started evaluation/revalidation and compiled your document as set out above but then wish to cancel the process completely, select the **Cancel** option from the Revalidation screen.

This will cancel the evaluation/revalidation process and permanently remove from SharePoint any supporting documents you have uploaded.



You will be asked to confirm that you wish to cancel by selecting Yes or No.

You can start the process again at another time.

Submit Approval

The various stages of the internal School and Faculty approval processes should be followed. (For award-bearing provision the Course/Subject Director, Head of School and Executive or Associate Dean must approve). When the documentation is ready to be submitted select the **Submit Approval** option to forward to the first in line in the Faculty approval chain. This person will provide comments and select **Approve** (which forwards the documentation to the next approver) or, if further information or review is required, **Return** – it must then be re-submitted).

(A system generated notification email will be sent to the originator when comments have been given). The next in line will then forward to the next and so on until it reaches the Executive/Associate Dean's Office for final approval. The Executive/Associate Dean will also provide comments and, if satisfied that the proposal is ready to be submitted to the panel, will select **Approve and Submit to Academic Office** (which forwards the documentation to the Academic Office) or, if further information or review is required **Return** – it must then be re-submitted).

The screenshot shows the 'Evaluation/Revalidation Unit' interface for '15A Hospitality (UG, BT, CE) - Aug-2019'. It lists various files under sections A through C2. At the bottom, there is a 'Combined Document - All Sections' section with a 'Regenerate Document' button. Below that, there are buttons for 'Edit/Add Files', 'Request/View Feedback', 'Cancel', 'Submit Approval' (highlighted with a red box), and 'Close'.

When final revisions have been made in light of feedback provided, you are ready to proceed and forward the document to the first or next approver.

(Absence of feedback from staff will not prevent you from proceeding to the Submit Approval stage.)

Once the 'Combined Document – all Sections' is generated, select **Submit Approval** from the **Evaluation/Revalidation Units** screen.

The screenshot shows the 'Submit for approval to' dialog box. It has a title bar 'Combined Document - All Sections' and a subtitle 'Combined Document - all sections - 15A Hospitality (UG, BT, CE).pdf'. There is an 'Approver' text box. Below it, there are two buttons: 'Forward to Approver' (highlighted with a red box) and 'Cancel Process'.

A box will appear – start to type the name of the first approver and select from the staff list which appears.

Click on **Forward to Approver** to send the documentation. As with providing feedback, the approver will receive an email with a link to provide comments.

Comments are then given in the box provided. When ready for it to be forwarded to the next in line, they will select **Approve and Forward** or **Return**.

The screenshot shows the bottom of the dialog box with four buttons: 'Approve and Forward' (highlighted with a red box), 'Return', 'Approve and Submit to Academic Office', and 'Cancel'.

Note: 'Approve and Submit to Academic Office' is for the Executive/Associate Dean only to submit to the Academic Office.

Faculty Approval for 15A Hospitality (UG, BT, CE)

Select the next approver

A box will be displayed where the name of the next person in the approval process can be inserted. Start to type the name and select from the staff list which appears. Select **Approve and Forward**.

The above process is repeated until the document is forwarded to the Dean.

This will forward the documentation to that person who adds comments and forwards to the next approver or rejects it.

The **final approver** is the **Executive or Associate Dean** who gives comments and selects either **Return** if further information/revisions are required – this action sends an email to the originator. (When ready to re-submit for approval, return to the start of the process and begin again) - or if the document is ready to be submitted to the Academic Office, **Approve and Submit to Academic Office**.

Path: p

Faculty Approval for 15A Hospitality (UG, BT, CE)

Submit to Academic Office

This action confirms final Faculty approval for submission to the Academic Office.

Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date
CMS Admin	23/08/2019 15:25:05	Completed	Approve	Approved.	CMS Admin	23/08/2019 15:31:52

A message is displayed on the screen asking the Executive/Associate Dean to confirm that the documentation is ready for distribution to the panel.

The Executive/Associate Dean will then **Submit to Academic Office** – this will forward the documentation to the Academic Office.

The **Executive or an Associate Dean** are the only ones to use the '**Submit to Academic Office**' button.

If Faculty approval has not been provided through submission from the Executive/Associate Dean, the document will be rejected (returned by the Academic Office) and will have to be re-submitted after this is obtained i.e. submitted to the Academic Office by the Executive/Associate Dean.

Viewing Progress

You can view the status and detail of the **Approval Tasks** (requests for feedback from other staff and progression in the Faculty approval chain together with comments provided by approvers) from the **Units** screen by selecting **View Document** followed by **View Approval Tasks**.

Clicking on **View Approval Tasks** in the Evaluation/Revalidation screen will also show the status of the University's authorisation.

Evaluation/Revalidation Unit 15A Hospitality (UG, BT, CE) - Aug-2019

Edit/Add Files

Request/View Feedback

View Approval Tasks

Close

Evaluation/Revalidation approval for 15A Hospitality (UG, BT, CE)

Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date
Academic Office	23/08/2019 15:35:38	Not complete				
CMS Admin	23/08/2019 15:31:52	Completed	Submit	Approved.	CMS Admin	23/08/2019 15:35:38
CMS Admin	23/08/2019 15:25:05	Completed	Approve	Approved.	CMS Admin	23/08/2019 15:31:52

When the documentation is submitted to the Academic Office it will lock each of the programmes/modular subjects within the Unit and these will show as **Revalidating** on the **Programme/ Modular Subjects Index** to prevent any further changes being made to the submitted version. Similarly, all associated modules will also show as **Revalidating**.

Programme / Modular Subject Index

Create New Programme

Create New Modular Subject

Programme Search

[Show Programmes](#) | [Show Modular Subjects](#) | [Show All](#) |

[Show Withdrawn](#)

Consumer Management and Food Innovation	BSc (Hons) (Modular)	Modular Subject	Unapproved	Revalidating Details Withdraw History PDF PDF (with modules)
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Hard Copies

Hard copies of the course documentation submitted are no longer required to be provided to the Academic Office. Panel members access all revalidation/evaluation documentation electronically through a dedicated SharePoint site set up by the Academic Office for each Unit.

After the Event

Following the revalidation or evaluation meeting, the Panel report detailing conditions and recommendations, along with analysis and appendix matrices, will be sent separately to the Unit Co-ordinator/Chair of Course Planning Committee. The document will be formally 'rejected' in the CMS by the Academic Office. This 'rejection' will unlock the documentation to allow revisions to be made. The Unit Co-ordinator/Chair of Course Planning Committee or other relevant staff will receive a system generated email notifying them of this.

The documentation will then be re-submitted to the Academic Office through **Evaluation/Revalidation Units** using the same process as for the original submission, as outlined on pages 1-8 of this guidance.

When the documentation has been signed-off by the Panel Chair, it will be **authorised** by the Academic Office and both the programme and associated modules will display as **Approved** in the **Programme/Modular Subjects Index** or **Modules Index**. This will also unlock the data for the programme and modules and allow updates and course revisions to be made. The Unit Co-ordinator/Chair of Course Planning Committee and other relevant staff indicated will each receive a system generated email notification of authorisation.

Evaluation/Revalidation History

Authorised evaluation/revalidation documents can be viewed from the **Evaluation/Revalidation Units Index** by selecting **Revalidation History** and **Details**.

Edit Current Approved

Approval Status	
Unapproved	Revalidating Edit Current Approved Details Withdraw History PDF

When the programme has been submitted for validation, the option **Edit Current Approved** will appear against it (if a previously approved version exists on the system).

This option will allow you to revise the current approved version only. This earlier approved version may be some ago so check that it is the one you want.

If a change is required for a module or programme before the 'effective from' date of the new programme, this is carried out as a **CA3** revision through the **Edit Current Approved** option.

Make the required revision/s through the **Edit** option on the programme or module, and follow the guidance relating to the **Faculty Approval Process**.

Remember to ensure to insert the relevant '**Effective From**' date in the new version.

Shared/Common Modules in separate Evaluation/Revalidation Processes

A module which is in a current evaluation/revalidation process will lock (show as 'revalidating') when the evaluation/revalidation process is created. If another evaluation/revalidation process is commenced at the same time the most recent version of any shared modules will be used for both processes.

When one of the Units is then authorised (or rejected) by the Academic Office, all programme and module information will unlock. Further revisions can then be made.