

CMS

Frequently Asked Questions

Staff should also refer to the detailed step by step CMS Guidance, available from the CMS homepage <https://curriculum.ulster.ac.uk/> to assist with each process, alongside the Programme Approval, Management and Review Handbook available at https://www.ulster.ac.uk/_data/assets/pdf_file/0004/307822/PAMR-Handbook.pdf

General

What is the CMS used for?

The CMS is used to create, maintain and print programme specifications, module descriptions and other documentation for internal and franchised provision.

How do I access the CMS?

It is accessed through the Staff area on the University Portal using your normal log in credentials (staff e-code and password). It can also be accessed directly and saved to your internet 'Favourites' at <https://curriculum.ulster.ac.uk/>

Can I access the CMS externally from outside the University?

Yes. CMS is accessible through your University Office 365 account. Log in using your normal credentials. You will see a link in SharePoint to the CMS.

Can I cut and paste information into the CMS from another source?

You can cut and paste text into the free text boxes throughout the input areas in the CMS but you need to check the PDF to ensure that the formatting is maintained and go back and revise if necessary. It is always preferable to type directly into the CMS where possible rather than pasting from elsewhere.

If you cut and paste a table or a picture, for example, from another source into any of the text boxes, the PDF will generate but a red message alerting you to the specific issue will appear at the place which is causing the problem. You will need to remove or fix this before sending for approval.

Do not input or cut and paste either the programme Structure diagram/s or the Contribution Table in the Section B3 Regulations as part of the 'Narratives'/Structure and Requirements' tab in the input/edit screens – both of these are generated by the CMS from the information input through the Modules tab for programmes or Module and Single Honours/Major/Main/Minor tabs for modular subjects.

Also remember to check the PDF of programme specifications and module descriptions to ensure that formatting is correct and headings not duplicated before starting an approval process.

Can I be assigned as an 'Approver' on the CMS?

All University staff have the same access rights on the CMS and normal faculty approval chains should be followed. You should only make changes where you have the right to do so but remember that the CMS programme/module history will retain details of the member of staff who made a change.

Why is my programme appearing as a Modular Subject in the CMS?

Programmes where there is a single honours as well as major/main/minor subject strand/s are held in the CMS as modular subjects. This allows the modules to be added for all strands in one entry.

Where can I see the subject combinations?

All approved subject combinations can be viewed from the Combined Subjects Index. The Academic Office is responsible for creating subject combinations approved by APAG/ASQEC. This index is also searchable.

Each Faculty/School is responsible for inputting information in respect of its own discipline only through Modular Subjects.

How do I make changes to a programme or module and will this replace information already on the CMS?

You should always work from the programme or module already on the system. First find it in the programme or module index. Select 'Edit' to make any changes or add new information. It is important to ensure that the correct 'Effective From' date is inserted and saved to relate to the version of the programme/module and when it will be first taught – this can be a date in the future and may result in two approved versions with different effective dates existing at the one time.

Any change will simply create a new version of the programme or module. All previous versions will be retained and can be viewed through the programme or module 'History'. From 'History' you can also view a version of a programme or module on a particular date.

I have created a new programme/modular subject/module in error or which no longer needs to be progressed. What should I do?

If you have an unwanted draft which has never been approved, you can simply delete it from the system by selecting the 'Delete' option beside it on the relevant index.

Why is there no 'live' link to the approval against an approved version of a module or programme/modular subject in the history?

A 'live' link will only be available where there is an approval process to link to. Some changes including those made to module reading lists or staff, do not require an approval process and do not affect the 'approved' status. Although these versions are approved, they do not have an approval process which is why the link is not live. This is also the case for programmes/modules which have been approved through evaluation/revalidation rather than through the 'Approval Process'.

Can I add non-University staff as (associate) course/subject Director, module co-ordinator or member of teaching staff?

Yes. Type the external user's email address into the relevant box. A text box will appear in which you enter the user's details and then 'Create new external user' to confirm.

Faculty Approval Process

A programme or module is appearing as 'Locked' on the index. Why?

When an approval process is started (created) for a programme or a module it will show as 'Locked' on the index to prevent any further changes being made to it during the process.

Clicking on the link 'Locked' will show the details of the approval/s causing the lock. You can then search for this approval in 'Approval Process' on the index and click on 'View Approval Tasks' to check its status.

How do I unlock a programme or module to make changes?

Once the approval process is completed in the Faculty and the programme/module authorised or rejected by the Academic Office, everything in that approval will unlock.

Clicking on 'Locked' will show the details of the approval/s causing the lock.

If you want to make changes before the approval process is completed, find the programme/module on the Approval Processes Index, and click the 'Cancel' option beside it (this option will only be available to the proposer of the approval process).

Selecting 'Cancel' will not delete any of the information already input, it will simply cancel the approval.

Why can I not 'Cancel' an approval?

The 'Cancel' option on the Approval Processes Index will only be available if you are the proposer of the approval i.e. you 'created' the approval on the system.

You can see what is causing the lock by clicking on 'Locked' in the index – this will also show the name of the proposer.

I am getting an error message in the approval process when I try to create the approval request.

First check the filename of the CA3 (CMS) form and also that of any other supporting files you are wanting to upload. Do not use any characters such as '&' or '/' or '\' in the filename or in the 'Short description of change' or an error will be thrown when you try to create the approval.

Can I check progress of an approval?

Yes. Find the approval in the Approval Processes Index by searching by programme/module title, module code or name of proposer and select 'View Approval Tasks' to check progress.

If you select 'Include Completed' prior to searching you will also be able to look at details of approvals which have been completed (this includes those which have been authorised or rejected). 'Exclude Completed' will return you to current approvals only.

Where can I see feedback provided by staff on an approval?

Find the approval in the Approval Processes Index by searching by programme/module title, module code or name of proposer and select 'Feedback' and then 'Show Feedback' to view any feedback provided. Select 'View Approval Tasks' to view comments from staff in the approval chain. If you select 'Include Completed' prior to searching you will also be able to look at approvals which have been completed (authorised or rejected) or cancelled. 'Exclude Completed' will return you to current approvals only.

I can't find the email I was sent asking me for approval. What do I do?

A link to your last 10 outstanding approval processes is provided on your personal dashboard on the CMS homepage.

You can also find the approval by searching by programme/module title, module code or name of proposer from the 'Approval Process' index. Select the 'View Approval Tasks' option against it

and you will see the word 'Complete' to the right hand side – select this and the approval screen to which the original email linked will appear. You should insert your comments and then forward to the next approver or reject.

What is the difference between 'Approve and Forward' and 'Approve and Submit to Academic Office' in the approval screen?

'Approve and Forward' is used to forward the approval to the next approver. 'Approve and Submit to Academic Office' should only be used by the Executive/Associate Dean to submit the approval to the Academic Office.

CA1/CA2a/CA3/CA5/CA9 Revisions and Proposals

Where do I find the CMS CA1, CA2a, CA3, CA5 or CA9 forms?

The forms are available through the 'Guidance' link on the CMS index or on the Academic Office website at <http://www.ulster.ac.uk/academicoffice/Documents&Forms.htm>

The relevant form should be completed and saved on your computer to allow you to upload it along with the revised programme(s)/module(s) as part of the Faculty Approval Process. When saving the relevant form, do not use any characters such as '&' or '/' or '\' in the filename or an error will be thrown when you try to create the approval.

Why am I getting an error message when I try to create the approval for my CA1, CA2a, CA3, CA5 or CA9?

Check that you have not used any characters in the filename such as '&' or '/' or '\' when you saved the form or in the 'Short description of change'. If you have, rename the file without these, save and attach it to the approval process and save.

How do I withdraw a module?

This is a two-step process. Find the module in the Module Index and select the 'Withdraw' option. You can only withdraw a module if it has at least one approved version. Otherwise, you can simply 'Delete' an unapproved draft. You then follow the Faculty Approval Process 'Creating Approval Request', uploading the completed CA3 (CMS) and follow the process outlined in the Faculty Approval Process guidance.

How do I withdraw a programme?

This is a two-step process. Find the programme in the Programmes/Modular Subjects Index, select 'Withdraw' (as before, it must have at least one approved version to be able to withdraw or simply 'Delete' an unapproved draft). You then follow the Faculty Approval Process 'Creating Approval Request', uploading the completed CA5 (CMS) form and follow the process outlined in the Faculty Approval Process guidance.

How do I cancel a withdrawal?

To cancel a withdrawal (for a date which has been set or a withdrawal which has already been approved), click on the 'Withdrawing (effective date)' against it on the relevant index. Click on 'Cancel Withdrawal' followed by Confirm. Click on Cancel to return to the index. The date and the withdrawing status will now have been removed.

If a programme/module has been set for or already approved for withdrawal but is part of an active approval process, you will not be able to cancel the withdrawal until that process has been completed.

If you are revising or cancelling an already approved withdrawal, you need to process a CA3/CA5 approval, as applicable. The proposed withdrawal can be cancelled/revised any time up to the date of withdrawal.

Can I view a withdrawn programme or module?

Yes. Any programme or module which is withdrawn will remain on the CMS. These can be viewed from the relevant index by selecting the 'Show Withdrawn' option to the top left of the screen.

What is the process for a new course proposal and CA1 (or new franchised proposal CA2a)?

The new programme should be created on the CMS with the summary and at least one instance completed. An approval should then be created, linking the programme and attaching the completed CA1/CA2a form, as applicable as well as any other supporting documentation. Once authorised, the programme will have a 'provisional' flag until it is authorised following the evaluation meeting.

Modules should not be attached to a CA1 approval process unless the proposal is to be without an evaluation event.

Revalidation/Evaluation

How do I assign a programme to an Evaluation/Revalidation Unit?

Programmes can only be assigned to a Unit, or an existing Unit revised, by the Academic Office. The Academic Office is also responsible for setting up new Units.

Where do I carry out the revalidation/evaluation process?

Revalidation and evaluation is undertaken through 'Evaluation/Revalidation Units' on the CMS index. The CMS will facilitate the compilation of your document.

What is the 'Indicative Date' stated in the Units index?

As it states, this date refers to the proposed month and year in which the event will take place, not the actual date. The date will be agreed in the normal way with the member of staff from the Academic Office responsible for servicing the event and in line with the availability of panel members.

When do I start evaluation/revalidation ('Compile Document')?

Evaluation/revalidation is the very last step and should only be started when all sections of the document are finalised for all courses within the Unit. This includes revisions to existing programme and module information, creation of new programmes/modules on the CMS and the other five sections and any other supporting files which are to be uploaded. This is because the compilation process must be undertaken in one step. There is, however, an option to make revisions or cancel the process once started and before submitting to the Academic Office (refer to *Evaluation/Revalidation Guidance*).

Is the entire evaluation/revalidation document produced from information on the CMS?

The CMS will generate the Programme Specification/s (Section B2), Structure Diagram/s (B2, Section 11), Contribution Table (B3 Regulations table) and Module Descriptions (Section B4) within the particular Unit through the compilation process, when you 'Compile Document'. You

can also generate the full document, including any additional files which, such as appendices, which you have uploaded.

The CMS will automatically include page numbers at the bottom of each page in the format A/1, A/2; B2/1, B2/2; C1/1, C1/2 etc, and a date.

'Commentary and Supporting Files' (sections A, B1, B3, C1, C2) are prepared in the normal way outside of the CMS and are uploaded as word documents as part of the evaluation/revalidation process. Headings and page numbering of these sections should be included in the files being uploaded, using the format as in the CMS generated sections (A/1, B1/1/, B1/2; B3/1; C1/1, C1/2 etc.) The relevant title page for evaluation or revalidation should also be inserted as the first page of Section A.

Does the programme and module information have to go through the Faculty Approval Process on the CMS and be approved before evaluation/revalidation?

No. The revisions made to the programme/modules in preparation for revalidation/evaluation will result in everything being in an 'unapproved' state on the CMS (any change, however small, creates a new unapproved version). The evaluation/revalidation is the approval process for all information relating to the Unit undergoing evaluation/revalidation.

Can I look at the full document before it is submitted for University authorisation?

Yes. After you have clicked on 'Compile Document' you can select 'Generate Document' from the 'View Document' link on the Evaluation/Revalidation Units Index. This will generate the full document – you will receive an email when the document is ready to view. You will need to refresh your screen to display the link to the file.

You can view the CMS generated sections only by selecting 'Preview B2, B3, B4' from the Units Index before you 'Compile Document'. (This option disappears once you 'Compile Document' (i.e. start evaluation/revalidation, and save.)

The individual PDF of a Programme Specification (Section B2 which includes system generated structure diagram/s) and individual Module Descriptions (Section B4) can also be viewed from either the Programme/Modular Subjects Index or Module Index at any time.

The Contribution Table in Section B3 Regulations which is generated from the programme/module information input into the system can be viewed through both the 'Preview B2, B3, B4' option or in the 'generated' document as above.

Do I still need to provide the Academic Office with hard copies even though I have submitted the documentation through the CMS?

No. Academic Office no longer requires hard copies of the documentation. This is taken directly from the CMS and held on a SharePoint site for panel members to access electronically.

If I start evaluation/revalidation ('Compile Document') can I cancel it?

Yes. Once you start the process 'Compile Document' and the document is compiled, you should search for the Unit in the Evaluation/Revalidation Units Index and select 'View Document'. When the Unit opens on screen, select 'Cancel' to cancel the process. After you have cancelled, 'View Document' against the Unit on the Evaluation/Revalidation Index will then revert back to 'Compile Document' allowing you to begin the process again.

I started evaluation/revalidation and then want to make further revisions – what do I do?

When the Evaluation/Revalidation process is created (Compile Document), everything in the Unit will show as 'Revalidating' (locked) on the Programme/Modular Subjects Index and Module Index.

No further changes to the CMS derived sections of the validation document can be made after this point until it is either cancelled by a user or returned/authorised by the Academic Office.

If you want to make further changes to the documentation after you have started the validation process, you should 'Cancel' to cancel the process. As above, after you have cancelled, 'View Document' against the Unit on the Evaluation/Revalidation Index will then revert back to 'Compile Document' allowing you to begin the process again when ready to do so.

Can I make further revisions to the five sections that I prepared outside of the CMS without having to start the process over again?

Yes. This is done by selecting 'Edit/Add Files' on the Evaluation/Revalidation screen. This will take you to the SharePoint site which is where these files are held by the CMS. Click on the file, then select 'Edit Document' in toolbar. Click on 'Edit in Word Web App' or 'Edit in Word', make your changes then save.

If you do not wish to edit the documents on SharePoint you can 'cancel', make your changes, 'Compile Document' and upload the five sections and any other supporting files to the CMS.

Reporting

Cognos reports can be extracted from the CMS. Access to Cognos is via the following link.

https://bi.ulster.ac.uk/ibmcognos/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/cc.xts&gohome=