

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

This guidance sets out the processes for obtaining feedback and seeking approval of planning for new courses (CA1), franchised course proposal (CA2a) course revisions (CA3), course withdrawals (CA5) and the introduction of credit bearing short courses (CA9 or CA3). The evaluation/revalidation approval process is carried out through the **Evaluation/Revalidation Units** area – see separate guidance.

New Course Proposal (CA1 internal or CA2a franchised)

Prior to starting the approval process for a new course, first create the programme/modular subject on the CMS. Only the minimum information needs to be input i.e. the Summary and Instances tabs, unless you are seeking approval without evaluation. Now follow the **Obtaining Approval** process set out on page 3.

Withdraw a Programme or Modular Subject (CA5)

[Note that withdrawal is a two-step process – setting a date for withdrawal is followed by creating an approval for that withdrawal.]

To **Withdraw a Programme or Modular Subject** (CA5) first complete and save the CA5 (CMS) form which is available on the CMS Guidance page or on the Academic Office website at: <http://www.ulster.ac.uk/academicoffice/Documents&Forms>

When saving the CA5 (CMS) 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.

To start the process:



Select **Programme/Modular Subject** from the blue area index.

Click **Withdraw** on the relevant programme/modular subject – this will start the withdrawal process.

Accounting (Pathways)	BSc (Hons)	Programme	Unapproved	Edit Details Edit Instances Withdraw History PDF
-----------------------	------------	-----------	------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Withdraw BSc (Hons) Accounting (Pathways)

Withdrawal Date

Insert the Withdrawal Date into the box provided. (The date should be the anticipated last graduation and must be on or after today's date. It cannot be a date in the past.)

Click Withdraw (or Cancel).

Accounting (Pathways)	BSc (Hons)	Programme	Unapproved	Edit Details Withdrawing 30/08/2017 History PDF PDF (with modules)
-----------------------	------------	-----------	------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

The programme/modular subject will now show as **Withdrawing with the effective date** on the Programme/Modular Subject Index.

If you create a withdrawal in error or want to cancel one, see page 2.

Now follow the **Obtaining Approval** process set out on page 3 to get approval for the withdrawal for which a date has been set.

Withdraw a Module (CA3)

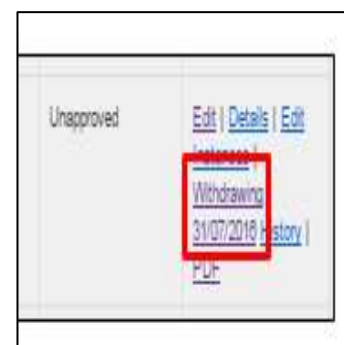
[Note that withdrawal is a two-step process – by first setting a date for withdrawal followed by creating an approval for that withdrawal.]

To **Withdraw a Module** that is no longer available for **any** course, follow the process as above but begin from the **Modules** index and use the CA3 (CMS) form which is available on the CMS Guidance page or on the Academic Office website at: <http://www.ulster.ac.uk/academicoffice/Documents&Forms>

Similarly, when saving the CA3 (CMS) 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.

Click **Withdraw** on the relevant module – this will start the withdrawal process. The module will show as **‘Withdrawing with the effective date’** but will remain as a live module that can be revised until the effective date of the withdrawal. You should also remember to revise the affected programme specification/s including the relevant future effective date as a result of the module withdrawal. (If the module has only ever existed in draft form and has never been approved, simply **Delete** it.)

If you are simply removing a module from a particular course but it remains in others, follow the process for “Revising and a Programme” or “Revising a Modular Subject”.



For other CA3 course revisions, make the changes to the course/modules and save **before** creating the approval. The relevant course/s and/or modules must be linked to the approval – refer to **Obtaining Approval** below.

Cancelling a Withdrawal

A withdrawal set for a programme/modular subject/module can be cancelled any time up to the effective date of the withdrawal.

To cancel a withdrawal (for a date which has been set but not yet approved or for a withdrawal which has already been approved) click on **Withdrawing (effective date)** on the index.



Click on **Cancel Withdrawal**.

Click on **Confirm** (or cancel). This will remove the withdrawal date and cancel the withdrawal.

Click on **Cancel** to return to the index.

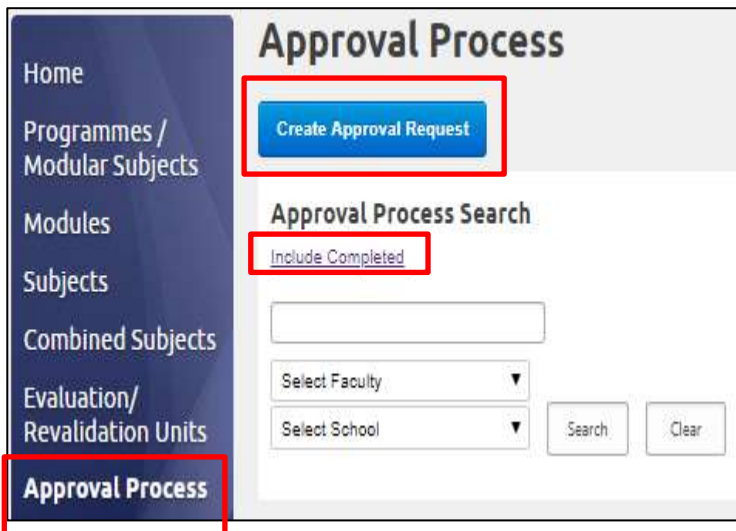
If a programme/modular subject/module is in an active approval process you will not be able to set it for withdrawal or modify an existing withdrawal until that process has been completed.

If you wish to **revise or cancel** an **approved withdrawal date**, you need to process a new CA3/CA5 approval request, as applicable. This can be done any time up to the date previously approved for withdrawal.

Obtaining Approval

The following sets out the process for **any** approval which is not part of evaluation/revalidation.

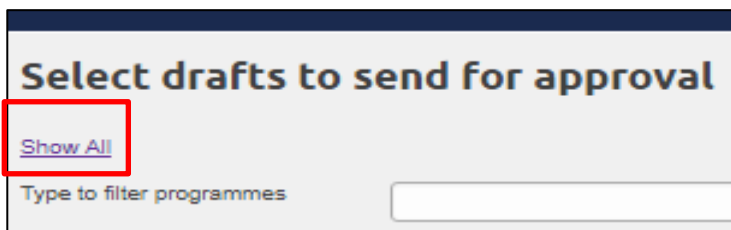
Select **Approval Process** from the blue area index. This will take you to the **Approval Process** screen which shows proposals awaiting approval. There is an option on this screen to view all completed approval requests and comment on previous approval requests – these can be viewed by clicking on **Include Completed**. You can use the search facility to search for a current or previous approval request for a course or module.



Click on **Create Approval Request**. This first screen relates to programmes/modular subjects.

If the relevant programme is not listed, click **Show All** – this screen will display **all** drafts yet to be approved.

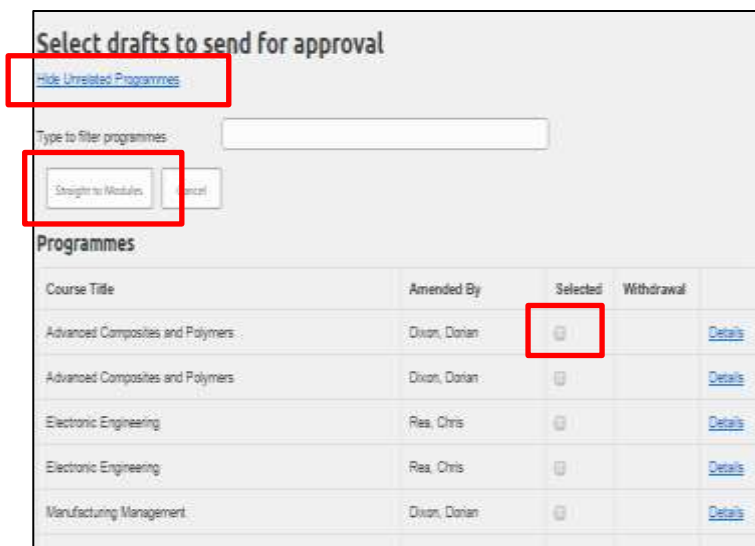
Show All is also available on the module selection screen.



If you wish to view only those for which you are responsible, click on **Hide Unrelated Programmes**. Selecting **Cancel** will cancel the approval process.

Select the programme(s) by ticking the box and click on **Modules** at the bottom of the screen to view and select modules, if applicable. If you are submitting a module or batch of modules only, select **Straight to Modules** at the top of the first screen to view the list of programmes or modules awaiting approval. (Note that if one module in a batch is not approved at the final authorisation stage, the whole batch will be rejected (returned) and will have to be resubmitted.)

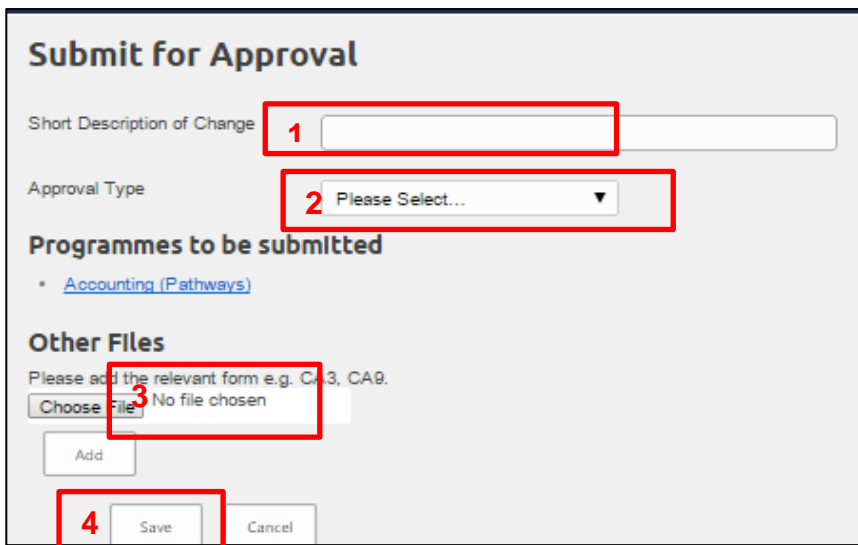
You can use the filter at the top of the screen to reduce the list.



Select the draft for the programme(s)/subject(s) you wish to send for approval by ticking the relevant box. Then Click **Modules** (even if there are no modules to be submitted) and select the draft module(s) in the same way, and click on **Next**. If there are no modules to be submitted, click on **Next**.



You will then be taken to the **Submit for Approval** screen. Here you are required **(1)** to enter a short description of the change (not to exceed 50 characters or include any special characters such as &, \, / etc) **(2)** select the **Approval Type** from the drop down list and **(3)** browse to attach other files – this is where the relevant form explaining the change and other documentation are attached by the appropriate person. Remember not to use characters including “&” or “/” or “\” in the filenames or an error will occur.



The template forms are available at <https://www.ulster.ac.uk/academicoffice/documents-and-forms> under Programme Approval and revision or under Guidance from the CMS menu.

Click **Add** to include an attachment and repeat if you want to add others. When the files have been attached, **(4)** click **Save**. This action ‘locks’ the relevant curriculum.



You can go directly to submit for approval (see below) but if you do not want to forward the submission for approval at this time, simply move out of the approval process after you have saved.

If you do not forward the submission, you (the originator) can cancel the approval from the **Approval Process** screen by clicking on **Cancel**. This will unlock the curriculum.

Also, if you wish to ask for feedback from other staff prior to submitting for approval, do not forward to approver as below but instead find the approval in the **Approval Process** screen and select **Feedback**. See pages 7 and 8 of this guidance for further details.

When ready to submit, find the approval in the **Approval Process** screen and select the **Start Approval** option.

Submit for Approval - School/Faculty

The various stages of the internal School and Faculty approval processes should be followed. (For award-bearing provision the Course/Subject Director, (Associate) Head of School and Executive/Associate Dean must approve).

Start Approval for Withdrawal of Accounting (Pathways)

Approval Process

Short Description of Change: Withdrawal of Accounting (Pathways)
 Approval Type: Course Withdrawal CA5

Programmes

- Accounting (Pathways) (View as PDF/View as Highlighted PDF)

Supporting Documents

[CA5 \(CMS\).docx](#)

Submit for approval to

Approver:

On the next screen start to type the name of the first approver in the box and select from the list which appears.

Select **Forward to Approver** to forward the request. The member of staff will receive an email providing a link to the approval.

Select **Cancel Process** if you wish to undo the request (and unlock the curriculum).

My tasks:

Outstanding approval processes:

[Withdrawal of Accounting \(Pathways\)](#)

This link will also show in the member of staff's personal dashboard on the Home page under **Outstanding approval processes**.

The approval request can also be viewed from the **Approval Process** screen. Find the approval and select **View Approval Tasks**. The person to whom the approval has been forwarded will have a **Complete** option. Select this to provide comments.

Approval for Withdrawal of Accounting (Pathways)

Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date	
CMS Admin	16/08/2016 11:28:14	Not complete					Complete

The proposal has been created and forwarded and will now appear in the **Approval Process** screen.

Approval Process

Approval Process Search

[Include Completed](#)

Select Faculty:

Select School:

|< < 1 > >|

Created Date	Programmes / Modules	Short Description	Approval Type	Proposed By	Outcome	
25/04/2017 12:50:00	Programme(s): Module(s):	BSc Hons Accounting (Pathways)	Course Revision CA3	McWall, Danielle		View Details Feedback Cancel Start Approval

Accounting (Pathways)	BSo (Hons)	Programme	Unapproved	Locked Details Edit Lock Withdrawal 01/07/2016 History PDF
-----------------------	------------	-----------	------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

The programme/modular subject/module will now also appear as **Locked** in the relevant index.

The lock is caused by the Approval Process

Short Description of Change: Withdrawal of Accounting (Pathways)

Approval Type: Course Withdrawal CA5

Proposed By: CMS Admin

Created Date: 16/08/2016 11:26:06

Programmes to be submitted

- Accounting (Pathways) (View as PDF/View as Highlighted PDF)

Supporting Documents

[CA5 \(CMS\).docx](#)

Close

If a programme/modular subject or module is showing as **Locked**, simply click on the word **Locked** to see details of the approval task causing the lock.

(The lock appears after an approval request is saved, not after it is submitted. Once the approval process is complete **Locked** will return to **Edit**. It can be cancelled before then by its originator.)

Approval for Withdrawal of Accounting (Pathways)

Approval by: CMS Admin

Approval Process

Short Description of Change: Withdrawal of Accounting (Pathways)

Approval Type: Course Withdrawal CA5

Programmes

- Accounting (Pathways) (View as PDF/View as Highlighted PDF)

Supporting Documents

[CA5 \(CMS\).docx](#)

Comments & Approval

No previous comments

Comments

B I U x x' [Rich Text Editor Icons]

The available options to the **approver** are: **Approve and Forward**, **Approve and Submit to the Academic Office**, **Return** or **Cancel**.

(**Approve and Submit to the Academic Office** is only for the use of the Executive/Associate Dean on behalf of Faculty Board.)

The first person in the approval chain will provide comments.

Use **Return** if more information is required – this will return the proposal to the originator with the comments.

If a proposal is returned, it will be automatically unlocked. When ready to be re-submitted you should start this process from the beginning.

If the proposal is satisfactory, click **Approve and Forward**.

Path: p

Approve and Forward | Return | Approve and Submit to Academic Office | Cancel

Approval for Withdrawal of Accounting (Pathways)

Select the next approver

Approve and Forward | Cancel

On the next screen you select the next in line in the approval chain. Click **Approve and Forward** to forward the proposal. Your comments are also forwarded and are displayed on the screen for the next approver (see below).

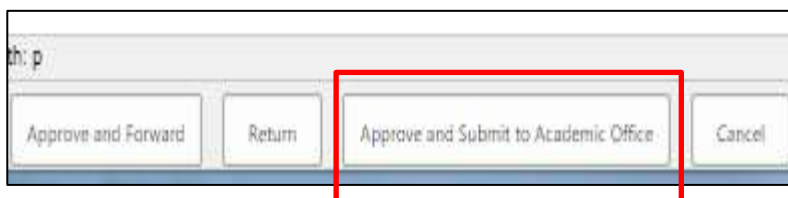
Previous comments can also be viewed by using **View Approval Tasks** on the **Approval Process** screen.

Approval for Withdrawal of Accounting (Pathways)						
Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date
Academic Office	16/08/2016 11:33:10	Not complete				
CMS Admin	16/08/2016 11:32:29	Completed	Submit	No further revisions required. I am happy to approve.	CMS Admin	16/08/2016 11:33:10
CMS Admin	16/08/2016 11:26:14	Completed	Approve	This is fine.	CMS Admin	16/08/2016 11:32:29

Back

The above is repeated as necessary within the School/Faculty approval process.

The final approver at Faculty level, the Associate or Executive Dean, will follow the same process. If satisfied with the proposal, **Approve and Submit to the Academic Office** is selected – this forwards the proposal to the Academic Office for University authorisation.



(If you click on **Approve and Submit to Academic Office** in error, simply click on **Cancel** on the next screen to return.)

Approval for Withdrawal of Accounting (Pathways)						
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	16/08/2016 11:38:59	Completed	Approve	This is fine.	CMS Admin	16/08/2016 11:37:43

Submit to Academic Office Cancel

Note: No proposals/revisions should be submitted for University authorisation without first being signed off at Faculty level by the Executive/Associate Dean. Any documentation submitted without the required approval will be rejected and returned. When the rejection relates to the absence of Faculty approval a new approval request should be created and forwarded to the next in line in the approval chain, finishing with the Dean.

View Approval Status of the Proposal

The status of the authorisation request can be viewed from the **Approval Process** screen by clicking on the **View Approval Tasks** beside the relevant request.

Approval Process Index

[Include Completed](#)

Approval Process Search

Accounting

Select Faculty ▼

Select School ▼

Search Clear

|< < 1 > >|

16/08/2016 11:38:50	Programme(s): Accounting (Pathways) Module(s):	Course Withdrawal CA5	CMS Admin	View Details Feedback Cancel View Approval Tasks
---------------------	---------------------------------------------------	-----------------------	-----------	------------------------------------------------------------------------------------------------------------------------

Approval for Withdrawal of Accounting (Pathways)

Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date
Academic Office	16/08/2016 11:41:14	Not complete				
CMS Admin	16/08/2016 11:37:43	Completed	Submit	No further revisions required. I am happy to approve.	CMS Admin	16/08/2016 11:41:14
CMS Admin	16/08/2016 11:38:59	Completed	Approve	This is fine.	CMS Admin	16/08/2016 11:37:43

Back

The proposal will be considered by the Academic Office – if incomplete or not appropriately approved by the Faculty it will be **Rejected** (returned) and must be re-submitted. If a proposal is returned by the Academic Office, you will receive a system generated notification email. This will **unlock** the proposal and enable you to go back and make any revisions through the relevant **Edit** option, before returning to the **Approval Process** to **Create** a new approval request. If the rejection relates to the absence of Faculty approval the same process should be followed. The CMS does not retain uploaded forms or supporting documents when an approval is returned.

Once authorised by the Academic Office, the revision will show as **Authorised** when you select **Include Completed** then the **View Approval Tasks** link from the **Approval Process** screen. A system generated notification email is automatically forwarded to the originator of the request (and others by adding names) to notify them of the outcome. The status of this version of the programme/modular subject or module changes to 'Approved' in the Programme/Modular Subject or Module Index.

Requesting Feedback (Except for a change relating to a course or module undergoing evaluation)

If you wish to request feedback from other staff through the CMS, find your proposal on the Approval Process screen and select **Feedback** - you are then taken to the **Feedback for ...** screen.

Feedback for Withdrawal of Accounting (Pathways)

Use this screen to ask for or give feedback

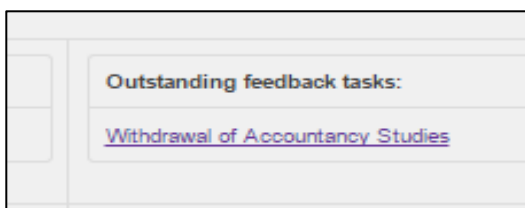
Feedback From	Requested Feedback	Feedback	Completed
Search for a person	<input type="text"/>		
What would you like feedback on?	<input type="text"/>		
		<input type="button" value="Add"/>	
<input type="button" value="Send"/>	<input type="button" value="Send and Close"/>	<input type="button" value="Cancel"/>	

Start to type the name of the relevant member of staff and select from the list which appears. Click **Add**. To request feedback from others, repeat this process and click **Add** each time. (**Send** will forward the request and remain on the Feedback screen; **Send and Close** will forward the request/s and return to the **Approval Process** screen.)

If you want to request feedback from more than one person with a different message in the 'What would you like feedback on?' box, after you insert the name and details of the feedback requested and **Add**, use the **Send** button after each one so that you remain on the Feedback screen. Repeat the above process as many times as required. After the last member of staff has been added, use the **Send and Close** option to be taken back to the **Approval Process** screen (see pages 4 and 5). Feedback can be requested from as many members of staff as you wish.

Providing Feedback

The staff who have been asked to provide feedback will receive a system generated email, advising them that feedback has been requested and providing a link to the request – clicking on this link will take them to a screen where comments can be provided.



This link will also be displayed in the member of staff's personal dashboard on the CMS home page under the heading **Outstanding feedback tasks**.

The request can also be accessed through the **Approval Process** screen and **Feedback** option beside the relevant request. The member of staff who has been requested to provide feedback will have a link to provide and forward comments.

The following screen is where feedback is provided by typing directly into the text box.

Provide Feedback

Feedback from: CMS Admin

Approval Process

Short Description of Change: Withdrawal of Accountancy Studies

Approval Type: Course Withdrawal CA5

Programmes

- [Accountancy Studies \(View as PDF/View as Highlighted PDF\)](#)

Supporting Documents

Feedback

Path:

Click on **Save and Complete** to send your feedback. The originator will receive an email to notify them that feedback has been provided.

Approval Process screen

Approval Process

[Create Approval Request](#)

Approval Process Search
[Include Completed](#)

Select Faculty

Select School

< < 1 2 3 4 > >|

Created Date	Programmes / Modules	Short Description	Approval Type	Proposed By	Outcome
27/06/2018 13:33:14	Programme(s): Business Technology Module(s): Information Systems Management, Digital Transformation and Innovation	Replace COM519 with ACF505 Business Technology	Course Revision CA3	Wylie, Judith	View Details Feedback Cancel View Approval Tasks
27/06/2018 15:41:15	Programme(s): International Business Module(s):	MSc InterBus Minor PT revisions as per AGE 27.5.18	Course Revision CA3	Gallagher, Damian	View Details Feedback Cancel

The search facility on the **Approval Process** screen allows you to search by programme, module code, module title or name of proposer and by Faculty and School.

Click on the **View Details** option on the **Approval Process** screen beside the relevant proposal and if applicable, **View Highlighted PDF** to see at a glance the summary and changes.

Approval Process Details

Short Description of Change: Withdrawal of Accounting (Pathways)

Approval Type: Course Withdrawal CA5

Proposed By: CMS Admin

Programmes to be submitted

- [Accounting \(Pathways\)](#) ([View as PDF](#)/[View as Highlighted PDF](#))

Supporting Documents

[CA5 \(CMS\).docx](#)

There is an opportunity here to add or revise supporting documentation e.g. CA3 form but not programme specifications or module descriptions.

From the **Approval Process** screen you can **View Approval Tasks**.

16/08/2016 11:36:50	Programme(s): Accounting (Pathways) Module(s):	Course Withdrawal CA5	CMS Admin	View Details Feedback Cancel View Approval Tasks
---------------------	-----------------------------------------------------------------	-----------------------	-----------	------------------------------------------------------------------------------------------------------------------------

View Approval Tasks will display a table showing who has been asked to provide feedback on the approval, details of any feedback given, and its current status.

Approval for Withdrawal of Accounting (Pathways)						
Assigned to	Date Assigned	Completed	Outcome	Comments	Completed By	Completed Date
Academic Office	16/08/2016 11:41:14	Not complete				
CMS Admin	16/08/2016 11:37:43	Completed	Submit	No further revisions required. I am happy to approve.	CMS Admin	16/08/2016 11:41:14
CMS Admin	16/08/2016 11:38:59	Completed	Approve	This is fine.	CMS Admin	16/08/2016 11:37:43

To make any further amendments in light of feedback, the programme/modular subject and/or module will have to be unlocked.

This is done by selecting **Cancel** beside the approval in the Approval Process screen and is only available to the original proposer of the approval.

Approval Process

[Create Approval Request](#)

Approval Process Search

[Include Completed](#)

Select Faculty ▼

Select School ▼

16/08/2016 11:38:50	Programme(s): Accounting (Pathways) Module(s):	Course Withdrawal CA5	CMS Admin	View Details Feedback Cancel View Approval Tasks
---------------------	---------------------------------------------------	-----------------------	-----------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Once unlocked and any further amendments have been made, a new approval needs to be created. This is done as before, following the process outlined on page 3 of this guidance. The approval process can then begin again.

Clicking on the word '**Locked**' on any locked programme or module will show details of the approval which is causing the lock. You can then also search for an approval in the **Approval Process** menu and check its status through '**View Approval Tasks**'.

The status of the programme/modular subject or module which has been approved will also show as **Approved** on the relevant index.