PIP User Guide

**University of Glasgow**

Information Services

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# Introduction to PIP

The PIP (“Programme Information Process”) system is the University of Glasgow’s information management system used to administer the programme and course approval process. Information from the system is published to the Course Catalogue and Programme Specification catalogue.

📄 This user guide is intended for academic and professional services staff who need to submit new, amend existing, withdraw or reinstate courses or programmes.

# Approval Procedures

At the University of Glasgow, the introduction of new programmes and courses (as well as changes and withdrawals) is subject to an approval process. College Boards of Studies have the authority to approve new programmes, programme amendments and programme withdrawals, with the process being monitored by the Academic Standards Committee (ASC). Schools have the authority to approve all new courses, amendments to existing courses and course withdrawals, and this process is overseen by ASC and the College Board of Studies.

The PIP approval procedures are document-based, and the core documents relating to this process are the Programme and/or Course Specifications. These specification documents are intended to provide core information to a range of users, including current and potential students, employers, academic/industrial reviewers and funding councils about a programme or course of study. These are presented to the School (and College in the case of programmes) via PIP, together with supporting documentation which normally includes a Programme or Course Support Document. The specification and support documents take the form of Microsoft Word templates.

Once academic approval of the proposal has been confirmed by the School or College (as appropriate) and administrative data entry in MyCampus is complete, the course or programme may be live for student enrolment and publication.

For more information on approval procedures, see the Academic Policy & Governance website.

It is understood that Schools might also have their own additional processes in place which they use for programme and course design, and which will sometimes be undertaken prior to Proposers engaging with the programme and course approval process managed through PIP. Further information about when and where this might apply can be sought from your School.

# Starting PIP

To access PIP, log in to the [MyGlasgow Staff](https://www.gla.ac.uk/myglasgow/staff/) portal using your GUID. On the Services sidebar you will see PIP System listed - click this link and you will be presented with the homepage.

⚠ PIP can be accessed either on campus or through a VPN-connected device. Please see the [VPN IT webpage](https://www.gla.ac.uk/myglasgow/it/vpn/) for further information on using a VPN with your device.

When you access PIP for the first time you may be prompted to accept a security certificate — you should select “Always trust content from this publisher.”

# Download Templates & Existing Specifications

Core course and programme information is provided in a specification document which conforms to a standard template. Any new course or programme proposal must be submitted using the supplied templates. The following templates are available for download from PIP:

|  |  |
| --- | --- |
| **Course** | Course Specification(s) & Course Support Document |
| **Programme** | Programme Specification(s) & Programme Support Document |

To amend a course or programme, an existing specification document must be downloaded, edited and submitted for approval. By default, PIP allows all academic staff to search and download specification documents based on desired criteria.

Professional services staff can [request access](https://www.gla.ac.uk/myglasgow/it/pip/) to PIP by creating a Helpdesk ticket for the Information Services PIP team and attaching a completed PIP Application Form detailing the access levels required.

## Download a Blank Word Template

From the homepage, select the Download Templates menu item on the left sidebar. This displays the Download Templates page with buttons to download the Specification and Support Document templates.

Clicking a button will download the linked file to your device’s Downloads folder.

## Download an Existing Specification

To amend an existing course or programme, you must first download the most recent version of the specification document from PIP.

Select Download Specifications from the left sidebar. This page contains a Search function to help find the existing course or programme specification document.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **Course/Programme Type** | Choose the type of specification from a drop-down list |
| **Course/Programme Level** | Choose the course level from a drop-down list |
| **Course/Programme Code**  | Input a valid live course code |
| **Course/Programme Title** | Search using known keywords from a course or programme title |
| **Academic Session** | Choose the academic session the specification applies to from a drop-down list. |
| **School** | Choose the School that the specification belongs to from a drop-down list. |

Once you have entered your search parameters, click on the Search button. This will load a page with a list of results.

⚠ Depending on your search criteria, this function can take some time to complete.

To download a specification, click on the Download button at the end of the row. This will download the document to your Downloads folder.

## Upgrade Documents

Specification documents require template changes from time to time to incorporate new fields or amendments. When this happens, new templates are released which means that specification documents you have saved to your device may be out of date. To ensure your specification documents stay compatible, PIP has the functionality to upgrade your documents.

Upgrade Document takes a specification document and upgrades it to the latest version of the specification template. Information is copied from the old version to new version, and PIP handles any of the field or data changes. Unless fields have been removed from the latest template, you will not lose any information from the old specification.

To upgrade a document, select Upgrade Document from the left sidebar. This will display the Upgrade Document page. Click the Uploadbuttonand select the course or programme specification file you wish to upgrade. Once complete, you will be prompted to save the new version of the document.

# Summary Documents

Summary Documents can be used to produce course or programme summaries based on the information contained in the fields of multiple specification documents. Users can search and select multiple courses, choose the required information from the fields on the Specification Document and export as individual or combined documents.

📄 Summary Documents allow you to reuse information stored in specification documents for other purposes. For example, as the basis of a Course Handbook.

From the PIP homepage, select Summary Documents on the left sidebar. On this page, you can search for courses or programmes you wish to generate summary documents from.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **Course/Programme Type** | Choose the type of specification from a drop-down list |
| **Course/Programme Code** | Input a valid live course code |
| **Course/Programme Title** | Search using known keywords from a course or programme title |
| **Academic Session** | Choose the academic session the specification applies to from a drop-down list. |
| **School** | Choose the School that the specification belongs to from a drop-down list. |

Once you have entered your search parameters, click the Searchbutton. This will load a page with a list of results.

You can select multiple results by clicking on the checkboxes under the rightmost column. Once click the Select button at the top of the page to proceed.

You will then be asked to select the fields you would like to appear in your summary document. You can choose from a list of the fields found in the specification templates.

When you have selected your field(s), click on the Generate Documents button. The system will now produce a summary document for each selected course or programme, as well as an option to Combine Documents.

Click on any of the buttons containing the course or programme name to save a copy of the summary to your Downloads folder.

You can also combine the documents into a single document using the Combine Documents button. This feature will stitch each of the listed documents into one file. When selecting Combine Documents a new page will load that allows you to include or exclude documents from the selected list and set the order in which they appear in the document.

Once the proposals are in the desired order, select Combine Documents to download the new summary document.

# Uploading Course Handbooks

Course Handbooks can be uploaded and attached to a course in PIP for each academic session. These documents can be made available for future reference should staff or former students require information regarding course content.

📄 There is no document template for Course Handbooks - any file type or format can be uploaded.

Select Course Handbooks from the left sidebar. A course search will appear, allowing the user to find the correct course and academic session for the course handbook document.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **Academic Session** | Choose the academic session the specification applies to from a drop-down list |
| **Course Name** | Search using known keywords from a course or programme title |
| **Course Code** | Input a valid live course code |
| **Include Withdrawn Courses** | Choose to include Withdrawn courses in your search results |

⚠ You can only search courses in your own School, or a School that you have [requested additional permissions](https://glasgow.saasiteu.com/Modules/SelfService/#knowledgeBase/view/1267C827A8D341128EA84BF1FDD02D1F) for.

Click on the Searchbutton to view your results.

Results are listed together with the filename of any existing handbooks in the Handbook column. To download a handbook, click on its filename under the Handbook column.

If no handbook is uploaded for a course, the Add Document button will display. Click this button and select a file to upload a handbook to PIP.

You can delete a handbook by clicking on the Delete button in the Edit column.

# New Course Proposal

To create a new course proposal in PIP you will require the following documentation:

* 1 Course Specification for each new course (you may submit up to 25 new courses on a single proposal)
* 1 Course Support Document for each specification
* (Optional) Consultation or other documents

The specification and support document templates are available via the Download Templates page. See Downloading Templates and Existing Specifications for more information.

There are two ways to create a new course in PIP:

* **Proposal Wizard** - recommended for those who are new or lapsed PIP users.
* **One-Step Proposals** - recommended for experienced PIP users.

## Create New Course — Wizard

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

The New Course(s) Proposal Wizard is a step-by-step process which takes a user through uploading and validating the correct documents necessary to submit a new course proposal.

To access the proposal wizard, select Create Proposal from the left sidebar. Once the page loads, the Proposal Wizards sidebar should appear on the right side of the screen. Select the New Course(s) option to launch the wizard.

### **Step 1 - Prepare**

Provides the user with all the requirements of a new course proposal, including required documentation and support on where to find templates or existing specifications before proceeding further.

### **Step 2 - Upload Course Specifications**

Click the Uploadbutton. This will launch a file browser - navigate to your course specification document. Once selected, press the **Open** button to upload the document to the wizard.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

After successful validation, the specification document(s) will appear on the list. Click the Next button to proceed.

### **Step 3 - Upload Course Support Document**

For each submitted course specification document, a course support document must be included in the proposal.

Click the Uploadbutton. This will launch a file browser - navigate to your course support document. Once selected, press the Open button to upload the document to the wizard.

Course support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the **Next** button to proceed.

### **Step 4 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Uploadbutton. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Nextbutton to proceed.

### **Step 5 - Upload Other Documents**

If you have any other documentation relevant to the approval of this course(s), click the Uploadbutton. This will launch a file browser - navigate to your other relevant file(s).

Once selected, press the **Open** button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the **Next** button to proceed.

⚠ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 6 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed.

### **Step 7 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

## Create New Course — One-Step Proposal

The New Course(s) - One-Step Proposal is a single-step method to create a new course proposal. This is designed for experienced PIP users who are familiar with proposal requirements and do not need to be guided through the process.

The one-step proposal is accessed from the Create Proposal page. To launch, click on New Course(s) under the One-Step Proposal heading on the right sidebar.

All documentation should be uploaded into the table, requiring at least one course specification and one course support document. You may also attach consultation documents or other relevant documents here.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

Click the Uploadbutton. This will launch a file browser - navigate to the folder containing your first document file. Once selected, press the Open button to upload the document to the wizard. Repeat this process for each document required by your proposal.

When you upload a consultation or other file, a drop-down option will appear under the Document Type column. Select the appropriate document type for each consultation or other document you attach to the proposal.

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

You can use the Cancelbutton to exit the proposal without saving it or you can click the **Save** buttonto save your proposal and return later.

To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# New Programme Proposal

To create a new programme proposal in PIP you will require the following documentation:

* 1 Programme Specification for each new programme (you may submit up to 25 new programmes on a single proposal)
* 1 Programme Support Document for each specification
* (Optional) Consultation or other documents

The specification and support document templates are available via the Download Templates page. See Downloading Templates and Existing Specifications for more information.

There are two ways to create a new programme in PIP:

* **Proposal Wizard** - recommended for those who are new or lapsed PIP users.
* **One-Step Proposals** - recommended for experienced PIP users.

## Create New Programme – Wizard

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

The New Programme(s) Proposal Wizard is a step-by-step process which takes a user through uploading and validating the correct documents necessary to submit a new programme proposal.

To access the proposal wizard, select Create Proposal from the left sidebar. Once the page loads, the Proposal Wizards sidebar should appear on the right side of the screen. Select the New Programmes(s) option to launch the wizard.

Before beginning the wizard, Programme Type options are presented. Select the drop-down option that best describes your proposal. The upcoming steps outline the process for a New PG or Non-Honours Programme(s) and New Single Honours Programme.

### **Step 1 - Prepare**

Provides the user with all the requirements of a new programme proposal, including required documentation and support on where to find templates or existing specifications before proceeding further.

### **Step 2 - Upload Programme Specifications**

Click the Upload button. This will launch a file browser - navigate to your programme specification document. Once selected, press the Open button to upload the document to the wizard.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

After successful validation, the specification document(s) will appear on the list. Click the Next button to proceed.

### **Step 3 - Upload Programme Support Document**

For each submitted programme specification document, a programme support document must be included in the proposal.

Click the Upload button. This will launch a file browser - navigate to your programme support document. Once selected, press the Open button to upload the document to the wizard.

Programme support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the Next button to proceed.

### **Step 4 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 5 - Upload Other Documents**

If you have any other documentation relevant to the approval of this programme(s), click the Upload button. This will launch a file browser - navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 6 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed.

### **Step 7 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

## Create New Combined Programme - Wizard

The Create New Combined Programme wizard contains additional steps not required by the New Programme wizard detailed above.

A combined programme is made up of two half programmes, each with their own specification document. The combined programme itself does not have a specification. The following section covers the additional steps when creating a new combined programme using the wizard.

### **Step 1 - Upload Common Half Specifications**

A proposal for a set of combinations must include one half programme common to all the combinations.

📄 The common half can be a new programme, or an existing one. Use the Download Specifications feature to download an existing common half.

Click the Upload button. This will launch a file browser - navigate to your specification document. Once selected, press the Open button to upload the document to the wizard.

### **Step 2 - Enter Search Criteria - Other Halves**

Search for and select the existing half programme(s) which make up the combination(s) with the common half.

### **Step 3 - Select Other Halves**

Select the existing half programme(s) by marking the checkbox under the Combine column on the table.

### **Step 4 - Enter Programme Titles**

Enter a name for the new combination(s).

Once names have been entered, the New Combined Programme(s) Wizard steps 5-10 are identical to steps 3-7 of the Create New Programme(s) wizard. Please see the previous section for details.

## Create New Programme – One-Step

The New Programme(s) - One-Step Proposal is a single-step method to create a new programme proposal. This is designed for experienced PIP users who are familiar with proposal requirements and do not need to be guided through the process.

The one-step proposal is accessed from the Create Proposal page. To launch, click on New Programme(s) under the One-Step Proposal heading on the right sidebar.

All documentation should be uploaded into the table, requiring at least one programme specification and one programme support document. You may also attach consultation documents or other relevant documents here.

Click the Upload button. This will launch a file browser - navigate to the folder containing your first document file. Once selected, press the Open button to upload the document to the wizard. Repeat this process for each document required by your proposal.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

When you upload a consultation or other file, a drop-down option will appear under the Document Type column. Select the appropriate document type for each consultation or other document you attach to the proposal.

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

You can use the Cancel button to exit the proposal without saving it or you can click the Save button to save your proposal and return later.

To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Amend Course Proposal

To amend a course (or courses) in PIP you will require the following documentation:

* A Course Specification document for each an existing course to be amended (up to 25)
* A Course Support document for each specification
* (Optional) Consultation or other documents

Existing course specification documents can be downloaded via Download Specifications and support document templates are available on the Download Templates page. See Downloading Templates and Existing Specifications for more information.

There are two ways to amend a course in PIP:

* **Proposal Wizard** - recommended for those who are new or lapsed PIP users.
* **One-Step Proposals** - recommended for experienced PIP users.

## Amend Course – Wizard

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

The Amend Course(s) Proposal Wizard is a step-by-step process which takes a user through uploading and validating the correct documents necessary to submit a proposal to amend a course.

To access the proposal wizard, select Create Proposal from the left sidebar. Once the page loads, the Proposal Wizards sidebar should appear on the right side of the screen. Select the Amend Course(s) option to launch the wizard.

### **Step 1 - Prepare**

Provides the user with all the requirements to create an amend course proposal, including required documentation and support on where to find templates or existing specifications before proceeding further.

### **Step 2 - Set as Correction**

The Type of Change field requires you to select the change type from the drop-down list.  The choices are:

* FULL
* CORRECTION
* NON\_SUBSTANTIVE

The definitions for each Type of Change are provided in the text box at the top of the page. Choose the correct change type and click the Next button to proceed.

### **Step 3 - Upload Course Specifications**

Click the Upload button. This will launch a file browser - navigate to your amended course specification document. Once selected, press the Open button to upload the document to the wizard.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

After successful validation, the specification document(s) will appear on the list. Click the Next button to proceed.

📄 If you are submitting a Correction the wizard will jump to Step 7 as you do not need to submit a Course Support document or other documents for this type of change.

### **Step 4 - Upload Course Support Document**

For each submitted course specification document, a course support document must be included in the proposal.

Click the Upload button. This will launch a file browser - navigate to your course support document. Once selected, press the Open button to upload the document to the wizard. Repeat this step until all required files are added to the table.

Course support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the Next button to proceed.

### **Step 5 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 6 - Upload Other Documents**

If you have any other documentation relevant to the approval of this course(s), click the Upload button. This will launch a file browser - navigate to your other relevant file(s).

Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 7 – Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed.

### **Step 8 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

## Amend Course – One-Step

The Amend Course(s) - One-Step Proposal is a single-step method to create a new course proposal. This is designed for experienced PIP users who are familiar with proposal requirements and do not need to be guided through the process.

The one-step proposal is accessed from the Create Proposal page. To launch, click on Amend Course(s) under the One-Step Proposal heading on the right sidebar.

All documentation should be uploaded into the table, requiring at least one course specification and one course support document. You may also attach consultation documents or other relevant documents here.

Click the Upload button. Navigate to the folder containing your first document file. Once selected, press the Open button to upload the document to the wizard. Repeat this process for each document required by your proposal.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

When you upload a consultation or other file, a drop-down option will appear under the Document Type column. Select the appropriate document type for each document you attach to the proposal.

Choose the Type of Change from the drop-down button that best describes the proposed amendment.

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

You can use the Cancel button to exit the proposal without saving it or you can click the Save button to save your proposal and return later.

To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Amend Programme Proposal

To amend a programme (or programmes) in PIP you will require the following documentation:

* A Programme Specification document for each an existing programme to be amended (up to 25)
* A Programme Support document for each specification
* (Optional) Consultation or other documents

Existing programme specification documents can be downloaded via Download Specifications and support document templates are available on the Download Templates page. See Downloading Templates and Existing Specifications for more information.

There are two ways to amend a programme in PIP:

* **Proposal Wizard** - recommended for those who are new or lapsed PIP users.
* **One-Step Proposals** - recommended for experienced PIP users.

## Amend Programme – Wizard

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

The Amend Programme(s) Proposal Wizard is a step-by-step process which takes a user through uploading and validating the correct documents necessary to submit a proposal to amend a programme.

To access the proposal wizard, select Create Proposal from the left sidebar. Once the page loads, the Proposal Wizards sidebar should appear on the right side of the screen. Select the Amend Programme(s) option to launch the wizard.

### **Step 1 - Prepare**

Provides the user with all the requirements to create an amend programme proposal, including required documentation and support on where to find templates or existing specifications before proceeding further.

### **Step 2 - Set as Correction**

The Type of Change field requires you to select the change type from the drop-down list.  The choices are:

* Academic Changes
* Corrections

The definitions for each Type of Change are provided in the text box at the top of the page. Choose the correct change type and click the Next button to proceed.

### **Step 3 - Upload Programme Specifications**

Click the Upload button. This will launch a file browser - navigate to your amended programme specification document. Once selected, press the Open button to upload the document to the wizard.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

After successful validation, the specification document(s) will appear on the list. Click the Next button to proceed.

📄 If you are submitting a Correction the wizard will jump to Step 7 as you do not need to submit a Course Support document or other documents for this type of change.

### **Step 4 - Upload Programme Support Document**

For each submitted programme specification document, a programme support document must be included in the proposal.

Click the Upload button. This will launch a file browser - navigate to your programme support document. Once selected, press the Open button to upload the document to the wizard. Repeat this step until all required files are added to the table.

Programme support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the Next button to proceed.

### **Step 5 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 6 - Upload Other Documents**

If you have any other documentation relevant to the approval of this programme(s), click the Upload button. This will launch a file browser - navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 7 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed.

### **Step 8 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

## Amend Programme – One-Step

The Amend Programme(s) - One-Step Proposal is a single-step method to amend an existing programme. This is designed for experienced PIP users who are familiar with proposal requirements and do not need to be guided through the process.

The one-step proposal is accessed from the Create Proposal page. To launch, click on Amend Programme(s) under the One-Step Proposal heading on the right sidebar.

All documentation should be uploaded into the table, requiring at least one programme specification and one programme support document. You may also attach consultation documents or other relevant documents here.

Click the Upload button. This will launch a file browser - navigate to the folder containing your first document file. Once selected, press the Open button to upload the document to the wizard. Repeat this process for each document required by your proposal.

⚠ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

When you upload a consultation or other file, a drop-down option will appear under the Document Type column. Select the appropriate document type for each consultation or other document you attach to the proposal.

Choose the Type of Change from the drop-down button that best describes the proposed amendment.

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – new Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

You can use the Cancel button to exit the proposal without saving it or you can click the Save button to save your proposal and return later.

To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Withdraw/Reinstate Courses or Programmes

You can submit a proposal to withdraw any course or programme. You can also propose to reinstate courses and programmes that have been previously withdrawn by yourself or others.

To submit a withdrawal or reinstate proposal, no specification or support documents are required. However, you can provide:

* Consultation document(s)
* Other relevant document(s)

These proposals can be actioned through use of the **Withdraw/Reinstate Course** and **Withdraw/Reinstate Programme** Proposal Wizards.

## Withdraw Courses or Programmes - Wizard

The Withdraw Course and Programme Wizards are step-by-step guides that takes a user through the process of submitting a withdrawal proposal.

To access the wizard, select Create Proposal from the left sidebar. The Proposal Wizards sidebar should appear on the right side of the screen. Select the Withdraw/Reinstate Course or Withdraw/Reinstate Programme option to launch the appropriate wizard.

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

### **Step 1 - Prepare**

Provides the user with all the requirements to create a withdrawal proposal, including suggested documentation in the form of Consultation or Other relevant documents.

To proceed, use the radio buttons to choose Withdraw. Then, click Start.

### **Step 2 - Enter Search Criteria**

Search for the courses or programmes you wish to withdraw.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **School** | Choose the School that the specification belongs to from a drop-down list. |
| **Course/Programme Code** | Input a valid course or programme code |
| **Course/Programme Title** | Search using known keywords from a course or programme title |
| **Academic Session** | Choose the academic session the course or programme applies to from a drop-down list. |

Click Next to proceed.

### **Step 3 - Select Course(s) / Programme(s) to Withdraw**

You can access the specification document for any listed course on the search results table by clicking the Download button.

Select the courses or programmes to include in your withdrawal proposal by clicking on the checkboxes on the right column. You can include up to 50 courses or programmes in a single proposal.

Click Next to proceed.

### **Step 4 - Confirm Selection**

Verify the academic session of the withdrawal shown in the text box and confirm the course(s) or programme(s) selected are correct.

Click Next to proceed.

### **Step 5 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 6 - Upload Other Documents**

If you have any other documentation relevant to the approval of this withdrawal, click the Upload button. This will launch a file browser - navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠️ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 7 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Maths – withdrawal of 4 Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however please note that they are not considered as part of the approval information.

Enter a reason for the proposal in the Reason for Withdraw - this will be used by the approvers to assess your proposal.

Click the Next button to proceed.

### **Step 8 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

## Reinstate Courses or Programmes - Wizard

To reinstate a withdrawn course, select Create Proposal from the left sidebar. The Proposal Wizards sidebar should appear on the right side of the screen. Select the Withdraw/Reinstate Course or Withdraw/Reinstate Programme option to launch the appropriate wizard.

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

### **Step 1 - Prepare**

Provides the user with all the requirements to create a withdrawal proposal, including suggested documentation in the form of Consultation or Other relevant documents.

To proceed, use the radio buttons to choose Reinstate. Then, click Start.

### **Step 2 - Enter Search Criteria**

Search for the courses or programmes you wish to reinstate.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **School** | Choose the School that the specification belongs to from a drop-down list. |
| **Course/Programme Code** | Input a valid course or programme code |
| **Course/Programme Title** | Search using known keywords from a course or programme title |
| **Academic Session** | Choose the academic session the course or programme applies to from a drop-down list.   |

### **Step 3 - Select Course(s) / Programme(s) to Reinstate**

You can access the specification document for any listed course on the search results table by clicking the Download button.

Select the courses or programmes to include in your reinstate proposal by clicking on the checkboxes on the right column. You can include up to 50 courses or programmes in a single proposal.

Click Next to proceed.

### S**tep 4 - Confirm Selection**

⚠️ Once the proposal receives final approval, all selected courses will be immediately reinstated.

Confirm the course(s) or programme(s) selected are correct.

Click Next to proceed.

### **Step 5 - Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser - navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 6 - Upload Other Documents**

If you have any other documentation relevant to the approval of this reinstate proposal, click the Upload button. This will launch a file browser - navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠️ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 7 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Maths – reinstate 4 Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Enter a reason for the proposal in the Reason for Reinstate - this will be used by the approvers to assess your proposal.

Click the Next button to proceed.

### **Step 8 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Bulk Update Courses

Using the **Bulk Update Courses** Proposal Wizard, you can select several courses, identify the fields to be changed and indicate what change needs to be applied to all specifications. The changed specifications are then submitted for approval as a proposal.

📄 Amend Course proposals allow users to submit multiple changes to specification documents. Amend Course is best used when making different changes to each specification. Bulk Update is best used when you wish to apply the same change to multiple specification documents. For example, changing the Location of multiple courses.

## Bulk Update Courses - Wizard

The Bulk Update Courses Wizard is a step-by-step process which takes a user through proposing bulk changes to specifications.

To begin, select Create Proposal from the left sidebar. The Proposal Wizards sidebar should appear on the right side of the screen. Select the Bulk Update Courses option to launch the wizard.

### **Step 1 - Prepare**

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

Provides the user with all the requirements to create a Bulk Update Courses proposal, including required documentation and support on where to find required document templates before proceeding further.

### **Step 2 - Enter Search Criteria**

Search for the courses or programmes you wish to make changes to.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **Academic Session** | Choose the academic session the course or programme applies to from a drop-down list. |
| **School** | Choose the School from a drop-down list. |
| **Course Title** | Search using known keywords from the course title. |
| **Credits** | Enter a credit value for the courses. |

Click Next to proceed.

### **Step 3 - Select Course(s) to Update**

Select the courses you wish to bulk update by ticking the box under the Change column.

Click Next to proceed.

### **Step 4 - Select Type of Change**

Select the Type of Change from the drop-down list. The choices are:

* Academic Change
* Correction

⚠️ Any proposed changes for the current academic session can only be categorised as a Correction.  This is due to restrictions on certain fields during the current session.

### **Step 5 - Select Fields**

Choose one or multiple fields to apply changes to by using the checkboxes under the Select column.

Click Next to proceed.

### **Step 6 - Define Changes**

The selected fields will populate this page in two columns: Find what and Replace with, matched side-by-side and organised by field.

These fields will match the data type stored in the specification document. For example, a drop-down value in the specification document will be presented as a drop-down option in both = the Find what and Replace with columns.

ℹ When making changes to drop-down data, you can use the ‘Any’ option under Find to replace any stored value with the Replace with selection.

Text boxes will be presented for any sections of the specification document that are text input. To replace all text in a field:

Enter an asterisk (\*) into a text box under the Find what column. The field’s contents will be replaced by the text entered in the corresponding Replace with text box. For example:

|  |  |  |
| --- | --- | --- |
| **Field** | **Find what** | **Replace with** |
| Timetable | \* | Two one-hour lectures a week in the first semester. |

To replace part of the text in a field:

You can enter a word, phrase or number in the Find what column to be replaced with the contents of Replace with. These values are case-sensitive and will not correct grammatical errors occurred by any changes. For example:

|  |  |  |
| --- | --- | --- |
| **Field** | **Find what** | **Replace with** |
| Summative Assessment Methods | distance learning | blended learning |

Once you have detailed your proposed changes, click Next.

PIP will check that the suggested changes are valid. If there are validation errors, they will appear on screen, and you will not be able to proceed until you resolve the problems. To proceed, you will need address one or more of the following:

* change the definition of the changes
* change the fields included in your proposal
* change the courses included in your proposal

Use the Back button to go back and change these if necessary.

### **Step 7 - Upload Course Support Document**

For each submitted change, a course support document must be included in the proposal.

Click the Upload button. This will launch a file browser - navigate to your course support document. Once selected, press the Open button to upload the document to the wizard. Repeat this step until all required files are added to the table.

Course support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the Next button to proceed.

⚠️ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

### **Step 8 – Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser – navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 9 – Upload Other Documents**

If you have any other documentation relevant to the approval of this bulk update, click the Upload button. This will launch a file browser – navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠️ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 10 - Preview Changes**

Click on the Preview button beside a course to see the specification document with the changes applied. This allows you to check the changes before submitting the proposal.

To make changes, use the Back button to navigate to the appropriate step before proceeding further.

Click Next to proceed.

### **Step 11 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – changes to Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed

### **Step 12 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Bulk Update Programmes

Using the **Bulk Update Programmes** Proposal Wizard, you can select several programmes, identify the fields to be changed and indicate what change needs to be applied to all specifications. The changed specifications are then submitted for approval as a proposal.

📄 Amend Programme(s) proposals allow users to submit multiple changes to specification documents. Amend Programme(s) is best used when making different changes to each specification. Bulk Update Programmes is best used when you wish to apply the same change to multiple specification documents. For example, changing the Location of multiple programmes.

## Bulk Update Programmes - Wizard

The Bulk Update Programmes Wizard is a step-by-step process which takes a user through proposing bulk changes to specifications.

To begin, select Create Proposal from the left sidebar. The Proposal Wizards sidebar should appear on the right side of the screen. Select the Bulk Update Programmes option to launch the wizard.

**🖱️ User Interface - Buttons**

**Save & Exit** – Exit this proposal at any time by pressing the Save & Exit button at the bottom of the wizard. You can access any saved proposals via the My Proposals menu option.

Your proposal will **not** be saved if you exit via any other method, such as clicking an option in the PIP menu or closing your browser window.

**Back** ⬅️ - The Back button navigates to the previous step.

**Next** ➡️ - The Next button will progress your proposal to the next step, provided all requested information has been input.

### **Step 1 - Prepare**

Provides the user with all the requirements to create a Bulk Update Programmes proposal, including required documentation and support on where to find required document templates before proceeding further.

### **Step 2 - Enter Search Criteria**

Search for the programmes or programmes you wish to make changes to.

Specify at least one of the following search criteria:

|  |  |
| --- | --- |
| **Academic Session** | Choose the academic session the programme applies to from a drop-down list. |
| **School** | Choose the School from a drop-down list. |

Click Next to proceed.

### **Step 3 - Select Programmes to Update**

Select the programmes you wish to bulk update by ticking the box under the Change column.

Click Next to proceed.

### **Step 4 - Select Type of Change**

Select the Type of Change from the drop-down list. The choices are:

* Academic Change
* Correction

Any proposed changes for the current academic session can only be categorised as a Correction.  This is due to restrictions on certain fields during the current session.

### **Step 5 - Select Fields**

Choose one or multiple fields to apply changes to by using the checkboxes under the Select column.

Click Next to proceed.

### **Step 6 - Define Changes**

The selected fields will populate this page in two columns: **Find what** and **Replace with**, matched side-by-side and organised by field.

These fields will match the data type stored in the specification document. For example, a drop-down value in the specification document will be presented as a drop-down option in both = the **Find what** and **Replace with** columns.

ℹ️ When making changes to drop-down data, you can use the Any option under Find to replace any stored value with the Replace with selection.

Text boxes will be presented for any sections of the specification document that are text input. To replace all text in a field:

Enter an asterisk (\*) into a text box under the **Find what** column. The field’s contents will be replaced by the text entered in the corresponding **Replace with** text box. For example:

|  |  |  |
| --- | --- | --- |
| **Field** | **Find what** | **Replace with** |
| Timetable | \* | Two one-hour lectures a week in the first semester. |

To replace part of the text in a field:

You can enter a word, phrase or number in the **Find what** column to be replaced with the contents of **Replace with**. These values are case-sensitive and will not correct grammatical errors occurred by any changes. For example:

|  |  |  |
| --- | --- | --- |
| **Field** | **Find what** | **Replace with** |
| Summative Assessment Methods | distance learning | blended learning |

Once you have detailed your proposed changes, click Next.

To change the value in the drop-down lists in all selected specifications regardless of the current selection, select 'Any' in 'Find what', for example:

Find What = Any Replace With = Full Time

PIP will check that the suggested changes are valid. If there are validation errors, they will appear on screen, and you will not be able to proceed until you resolve the problems. To proceed, you will need address one or more of the following:

* change the definition of the changes
* change the fields included in your proposal
* change the programmes included in your proposal

Use the Back button to go back and change these if necessary.

### **Step 7 - Upload Programme Support Document**

For each submitted change, a programme support document must be included in the proposal.

Click the Upload button. This will launch a file browser - navigate to your programme support document. Once selected, press the Open button to upload the document to the wizard. Repeat this step until all required files are added to the table.

Programme support documents are also subject to validation. Please follow the correction steps in the information box above if you receive any error messages. Once the required document(s) appear in the document list, click the Next button to proceed.

⚠️ When you upload a specification or support document, PIP validates the document to ensure there are no errors, missing information or issues that would impede a proposal’s progress to the next stage.

If a document fails validation, an error message will appear. In most cases the error message will specify the section of the document containing the issue. To address an error, either:

* Open the specification document in Microsoft Word to make changes and save the file.
* In the case of repeated errors, download a fresh template file and fill out the require information.

Repeat the upload process to continue with the proposal.

### **Step 8 – Upload Consultation Documents**

Consultation documents can be any filetype. For example, you can upload an email or a spreadsheet as a consultation document. You may upload as many consultation documents as required.

Click the Upload button. This will launch a file browser – navigate to your consultation document. Once selected, press the Open button to upload the document to the wizard.

There is no validation process for consultation documents, once you have uploaded your consultation documents click the Next button to proceed.

### **Step 9 – Upload Other Documents**

If you have any other documentation relevant to the approval of this bulk update, click the Upload button. This will launch a file browser – navigate to your other relevant file(s). Once selected, press the Open button to upload the document to the wizard.

There is no validation process for other documents, once you have uploaded your other documents click the Next button to proceed.

⚠️ While PIP does not perform validation on consultation or other documents, the system will verify that the files selected are **not** in a specification or support document template format.

If you accidentally attempt to upload a specification or support document, you may receive an error. Ensure that you select the correct consultation or other documents before proceeding.

### **Step 10 - Preview Changes**

Click on the Preview button beside a programme to see the specification document with the changes applied. This allows you to check the changes before submitting the proposal.

To make changes, use the Back button to navigate to the appropriate step before proceeding further.

Click Next to proceed.

### **Step 11 - Enter Proposal Information**

Enter a Description for your proposal. This description will be visible by all approvers throughout the process. Please include the School and level, e.g. “Economics – changes to Honours components”.

Comments can also be attached to the proposal. All approvers will have access to the comments, however the please note that they are not considered as part of the approval information.

Click the Next button to proceed.

**Step 12 - Submit For Approval**

This final step presents a summary of the proposal - verify the presented information.

* If you need to make changes to the proposal before submitting, use the Back button to return to previous steps.
* Use the Save & Exit button to save your progress and return to the proposal later.
* To submit the proposal, click the Submit for Approval button.

Once submitted, the confirmation screen will display a unique Proposal ID. Please note this for future reference.

# Re-submitting a proposal after rejection

## Inbox

If a proposal is returned for amendments to be actioned, use the **Inbox** feature to manage the proposal. An email notification will be sent with a link direct to the Inbox.

Alternatively, you can access it via the Inbox menu item on the left sidebar in PIP.

Proposals requiring amendments will be labelled Resubmit under the Task column. Click the Select button to open the proposal in the Task screen.

## Task screen

**🖱️ User Interface - Buttons**

**Back** – The Back to Inbox button takes you to the Inbox.

**Show History** – See a detailed history of the proposal.

**Delete Proposal** – The Delete Proposal button will completely remove the entire proposal and terminate the approval process. Only use this if you are sure you do not want to proceed with the proposal.

**Re-submit Proposal** – Re-submits the proposal to the approval process after it has been returned for review.

**Add Doc** – Add another document to the proposal.

**Combine Docs** – Combine the Word documents in the proposal into one larger document.

The heading details the proposal type (e.g., New Programme Approval) and the task type (e.g., Resubmit). Below the heading, each step in the proposal journey will be shown.

There are three tables on the Task screen:

* Proposal: Provides the Proposal ID, the GUID of the owner, the proposal’s description and the chosen academic year for the proposal.
* Documents: Contains all documents attached to the proposal.
* Comments: A journal of comments created by the owner and any of the approvers throughout the proposal journey.

To re-submit a proposal, update the documents table with any requested changes or additional information, then click the Re-submit Proposal button.

## Task screen – Updating Proposal Documents

There are three actions you can perform when updating the Documents table:

1. Edit an existing document:
* Click the Download button to download one of the listed documents to your computer.
* Once downloaded, a lock icon 🔒 will appear and two new buttons will be available on the table row – Cancel Lock and Upload.
* Make changes to the document using Microsoft Word, save it to your device and use the Upload button to save these changes to your proposal.
* To cancel this action, click Cancel Lock.

⚠️ You must either cancel the lock or upload the document. Otherwise, you will not be able to re-submit the proposal.

1. Add a new document:
* Click the Add Doc button to add an additional document to your proposal.
* Use your operating system’s file browser to locate the file and click Open.

📄 Any additional documents will be categorised as Other documents. Specification document or course support documents cannot be added after a proposal has been submitted.

1. Delete a document:
* Other documents and Consultation documents can be removed from the proposal using the Delete button.
* Mandatory documents such as specification documents and course support documents cannot be deleted after a proposal has been submitted.

## Task screen – Adding Comments

Use the Add Comment button to add comments to a proposal. These can be used as an informal method of communication between the proposal owner and any approvers.

Click the Show All Comments button on the Task screen to view all comments in more detail. From here, comments can be deleted to by clicking the Delete button at the end of the row.

## Task screen – Re-submitting the Proposal

Once you have made any requested changes, use the Re-submit Proposal button to forward the proposal for approval.

## Task screen – Combining Documents

**🖱️ User Interface - Buttons**

**Back** - The Back button takes you to the Inbox.

**Combine Documents** - Click the Combine Documents button to create a single document from the documents listed in the Included Documents list.

Combine Documents allows you to merge several documents into one, making it easier to print or send a copy of the proposal. To access, click the Combine Documents button on the Task screen.

There are two lists on this page:

* Excluded Documents
* Included Documents

When the page is loaded for the first time, all documents in the proposal will be contained within the Excluded Documents lists. To include them in a combined document, select the document(s) and use the arrow buttons on the centre of the page to move them to the Included Documents list.

**🖱️ User Interface - Buttons**

**Single Arrow (Right)** ➡️ - Moves the selected document from Excluded Documents to Included Documents

**Double Arrow (Right**) ➡️➡️ - Moves all the documents from Excluded Documents to Included Documents

**Single Arrow (Left)** ⬅️ - Moves the selected document from Included Documents to Excluded Documents

**Double Arrow (Left)** ⬅️⬅️ - Moves all the documents from Included Documents to Excluded Documents

You can reorder the documents by using the Up and Down buttons next to the Included Documents list.

You can also optionally append the documents to an existing document from your device. Using the Upload button, you can include an existing file in the list of Included Documents.

📄 Using the Append to existing document feature, you could combine multiple proposals into a single document for easy sharing or printing.

Once you have the Included Documents arranged as desired, click the Combined Documents button to download the new document to your device.

# My Proposals

You can view any information about proposals you have submitted via the **My Proposals** page. To access, click My Proposals on the left sidebar.

This screen allows you to view any proposals you have created whether they are Still in Draft or Awaiting Approval. These features are accessed on the right sidebar on the My Proposals page:

* Still in Draft: Any proposals in-progress which have not been submitted and still have required steps to complete in the proposal wizard.
* Awaiting Approval: Any proposals which have been submitted and are awaiting School, College or Registry approval.

## Still in Draft

To return to an in-progress proposal wizard, click the Select button next to the draft proposal. This will take you to the next required step in the process.

To delete a draft proposal, click the Delete button.

## Awaiting Approval

This page allows you to view the status of any in-progress proposals that have been submitted for approval. The following information is listed on this page:

* Proposal ID
* Proposal Type
* Description
* Approval Stage
* Status
* Started On (date)

You can view a more detailed Proposal History by clicking the View button next to a proposal. The information on this page cannot be edited and is for the purpose of providing an overview of the in-progress proposal.

# Search Proposals

On the **Search Proposals** page, you can specify criteria to search for proposals that have been submitted to PIP. To access, click the Search Proposals button on the left sidebar.

To search, you must specify one or more of the following search options:

|  |  |
| --- | --- |
| **Proposal ID** | Input a valid Proposal ID |
| **Course/Programme Code** | Input a valid live course code |
| **Course/Programme Title** | Search using known keywords from a course or programme title |
| **School** | Choose the School that the specification belongs to from a drop-down list (note: you can only choose Schools that you have permission to see) |
| **Approval Stage** | Choose the approval stage for the proposal |
| **Proposal Type** | Choose the proposal type from a drop-down list |
| **Created after** | View proposals created after a chosen date |
| **Created before** | View proposals created before a chosen date |
| **Include Historical** | Select to include results from previous academic sessions |

Click the Search button to continue.

## Results List

By default, search results are ordered in ascending Proposal ID order. To change the order, click on the column headings. If there are several pages of results, use the navigation arrows to scroll through them.

To retrieve any proposal, click on the History link adjacent to the proposal.

Use the Excel Download button above the results to download the results to a spreadsheet.

⚠️ Draft proposals are not included in the results.

## Proposal History

Opening the History link on a proposal lists further information about the chosen proposal and displays links to all documents submitted.  This includes dates, times and staff members involved in the approval process.

# Appendix A: Approval Levels in PIP

When creating, amending or withdrawing courses and programmes in PIP, a certain level of approval is required to confirm the action taken. The level of approval required can be School, College or Senate and depends on what you are doing and when you are doing it. This document outlines the rules that determine the approval level.

Note that the levels of approval are cumulative, so College approval requires School then College approval; and Senate approval requires School then College then Senate approval.

The table below shows the level of approval required for each type of proposal.

|  |  |  |
| --- | --- | --- |
| **Proposal Type** | **Approval Level** | **When** |
| New Course(s) | College | Always |
| New Programme (s) | Senate | Always |
| Amend Course(s) | School | Always |
| Amend Programme(s) | College | Always |
| Withdraw Course(s) | School | Always |
| Withdraw Programme(s)  | College | Always |

# Appendix B: Document Validation in PIP

When you upload a document in PIP, checks are made to ensure that the document conforms to certain conditions. We call this process document validation. If any of these conditions are not met a message is displayed telling you what is wrong with the document. For example, in the New Course Wizard when prompted to upload a course specification, the system checks that what you are uploading is in fact a course specification document and not some other file.

The validation rules are not always simple and depend on what you are doing (e.g. uploading a specification for a new course has different rules to an amended programme) but we hope to cast some light on the subject in this user guide.