The University of Manchester

Campus Solutions
Training Guide

Course Marketing

IT Services Training Team
The University of Manchester
email: its.training@manchester.ac.uk
www.itservices.manchester.ac.uk/trainingcourses/coursesforstaff
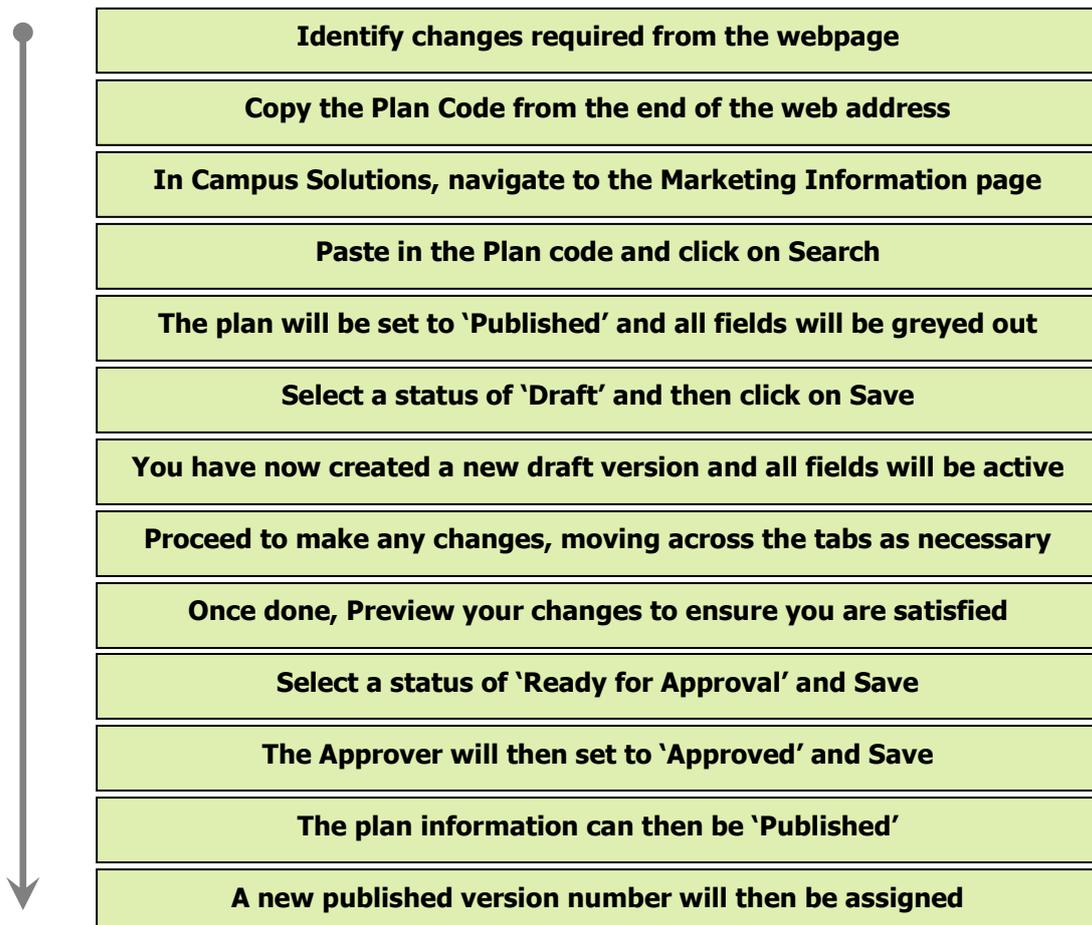**Version:** 1.0

Table of Contents

Introduction

As prospective students are constantly browsing the University web pages for information on the programs & plans we offer, this needs to be actively maintained so that the most up-to-date information is always available. In the past, this maintenance task has been carried out centrally, however the University has now taken the decision to devolve this task out to Faculties and Schools, so that they themselves are responsible for the upkeep of this material.

The Course Marketing module in Campus Solutions has been specifically designed to the requirements of the University. It is thought that users will work on Campus solutions in conjunction with viewing the published information on the University website.

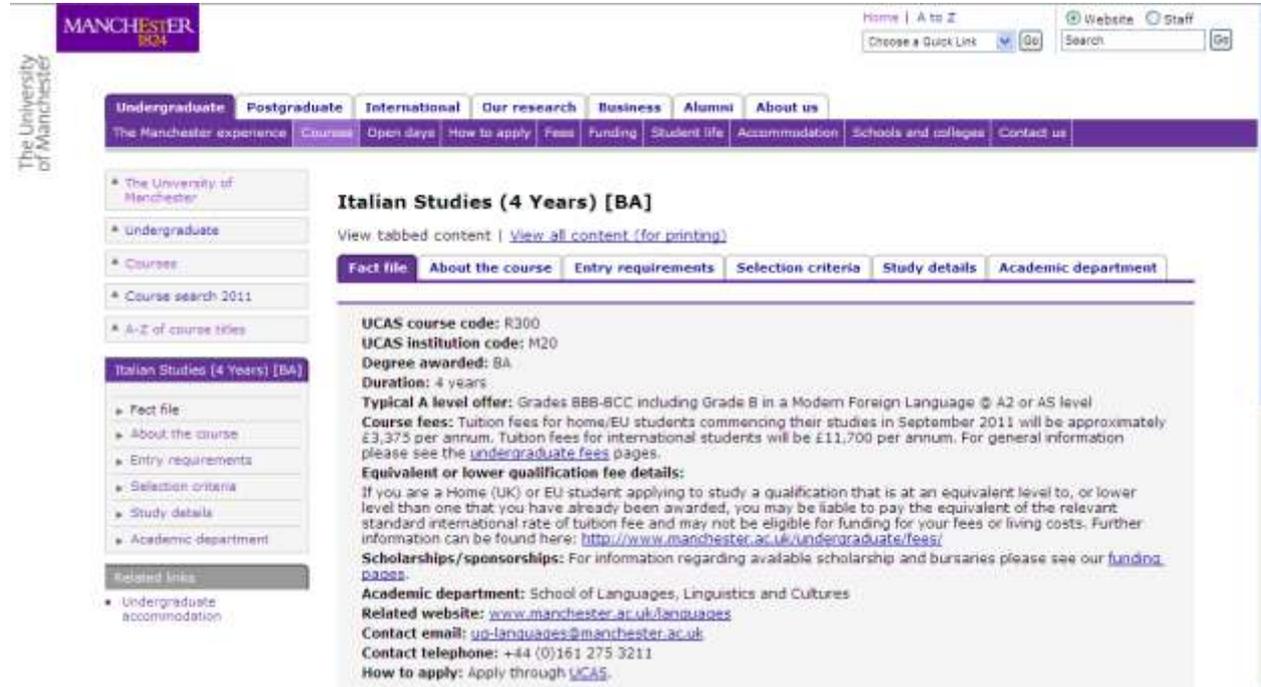The procedure follows 4 main process steps – **Draft > Ready for Approval > Approval> Publish**

The editing of a publishing plan must be made in the Draft stage (this is the only stage at which changes can be made) and then the process follows to approve and finally publish the data.

A brief outline of workflow is detailed below.

Identify changes required from the webpage

Copy the Plan Code from the end of the web address

In Campus Solutions, navigate to the Marketing Information page

Paste in the Plan code and click on Search

The plan will be set to 'Published' and all fields will be greyed out

Select a status of 'Draft' and then click on Save

You have now created a new draft version and all fields will be active

Proceed to make any changes, moving across the tabs as necessary

Once done, Preview your changes to ensure you are satisfied

Select a status of 'Ready for Approval' and Save

The Approver will then set to 'Approved' and Save

The plan information can then be 'Published'

A new published version number will then be assigned

Viewing the Existing Published Data

- You can view the existing published plan data on the University webpages. Navigating from the main University Homepage www.manchester.ac.uk, locate your chosen plan to view.

- You will see that the page is divided up into various tabbed sections that can be navigated through.

ⓘ   **NOTE**: The final 5 digits of the web-page address relate directly to the Plan code within Campus Solutions. You can therefore 'copy and paste' this into the search page when locating this specific plan in the system.
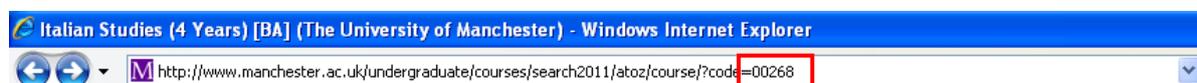
Making Changes

Calling up the Publishing Plan Data

After having identified the changes you wish to make from the web-page, copy the plan code from the end of the web address (as shown on the previous page) so that you can use it to search as detailed below.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Copy in the **Academic Plan** code and then click on the **Search** button. (The Academic Organization value will default in, as you will only have access to update records for your own school).

   Marketing Information

   Enter any information you have and click Search. Leave fields blank for a list of all values.

   | Find an Existing Value | Add a New Value |

   Limit the number of results to (up to 300): 300
   Academic Institution: begins with   UMANC
   Academic Plan: begins with   00268
   Academic Year: begins with   2011
   Description: begins with
   Academic Organization: begins with   1000
   Academic Career: begins with
   Publishing Status: =
   ☐ Case Sensitive

   Search   Clear   Basic Search   Save Search Criteria

2. The publishing plan details will then be displayed. You will see that most of it appears greyed out however, as the **Publishing Status** is set to 'Published' and the **Version** is set to a whole number.

   | Fact File | About the Plan | Plan Content | Entry Requirements | Selection Criteria | Study Details | Contacts |

   Academic Institution   UMANC   The University of Manchester
   Academic Plan   00268   BA(Hons) Italian Studies
   Academic Year   2011   2011/12 Academic Year

   Find | View All   First 1 of 6 Last

   Version   3.000   *Publishing Status   4. Published
   Effective Date   18/01/2011   UCAS Code   R300   Re-Publish
   Plan Title (Web)   Italian Studies (4 Years) [BA]
   *Subject Area   LL   Modern Languages and Cultures
   Related Subject Area(s)
   *Qualification Award   BA
   *Duration   4 years

3. You will see that the page is split into tabbed sections, similar to that on the web-pages for ease of use and familiarity.

   | Fact File | About the Plan | Plan Content | Entry Requirements | Selection Criteria | Study Details | Contacts |

Creating a New Draft

In order to make changes to the plan information, you will need to firstly create a new 'Draft' version (as the plan is currently set to 'Published' and so no more changes to this version are permitted).

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan data as described on page 6.

2. Change the **Publishing Status** to be 'Draft' from the drop-down menu.

3. Scroll down and click on the **Save** button at the foot of the page. You will see that the **Version** now increments to .001 to signify a new draft, and that the fields now become available.

Editing Information

Once a 'Draft' version has been established, you can then begin to edit the fields.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan and create a new draft version, as described across pages 6.

2. You can now begin to amend information across the various tabs. You may wish to keep the webpage open whilst working in Campus Solutions, for your reference. Below is a table of how the information both across the webpage and in Campus Solutions is stored. Be aware that this may alter slightly however, depending on any future changes made by the web team.

Webpage Tab	Possible Content	Campus Solutions Tab(s)
Fact File	UCAS code; Degree awarded; Duration; Typical A level offer; Number of places/applicants; Academic department; Related website; Contact email; Contact telephone; How to apply; Course fees; Additional expenses; Scholarships/Sponsorships; Open days; Academic Entry Qualification	Fact File; Entry Requirements
About The Course	Course Description; Special features; Module details; Course aims; Course units overview; Course content for year 1; Course content for year 2; Course content for year 3; Course content for year 4; Course content for year 5; Career opportunities; Scholarships & Bursaries; Student opinions; Accrediting organisations; Associated organisations; Course collaboration(s)	About The Plan; Plan Content; Fact File
Entry Requirements	Application requirements; English language requirements; A-level entry requirements; AVCE entry requirements; BTEC entry requirements; GCSE entry requirements; Intl. Baccalaureate entry req.; Irish entry requirements; Other Intl. entry requirements; Other/Mature entry req.; Professional entry qual.; Scottish entry requirements	Entry Requirements
Selection Criteria	Advice to Applicants; How Apps are Considered; Non-academic Criteria; Interview Requirements; Returning to Education; Aptitude Test Requirement; Fitness to Practice; Criminal Records Bureau Check; Deferrals; Re-sit Applicants; Multiple Sitting Applicants; Re-Applications; Transfers; Portfolio Requirements; Overseas (non UK) Applicants	Selection Criteria
Study Details	Teaching and learning; Course work and assessment; Facilities; Disability support	Study Details
Academic Department	Admitting department; Contact name; Telephone; Fax; Email address; Website; Overview; Related research; Subject area; Related courses	Contacts; Additional Information
Career Opportunities (PG only)	Career Opportunities	About the Plan

3. To change a **field value** click the **look-up** button. You will be presented with a list of values to select from.

4. To change **basic entry text fields**, simply delete and re-enter the relevant data.

ⓘ   **NOTE:** *The information populated directly from Campus Solutions (Qualification Award & Duration) should only be reformatted and not changed completely. If this information is incorrect this means that the plan has been set up incorrectly and you will need to contact the relevant plan administrator to have this corrected.*

5. For **bigger blocks of text**, there is an **HTML editing facility**. Clicking on this notepad icon will open up a full text entry and editing facility – allowing you to format the text exactly as you wish for it to appear on the final webpage, using standard Microsoft Word functionality.

Course Fees (Short Version)   Max: 1000

Fees for entry in 2011 have not yet been set. For entry in 2010, the tuition fees are £3,290 per annum for home/EU students, and are expected to increase slightly for 2011 entry. For general fee information, please visit: Undergraduate fees.

Edit HTML

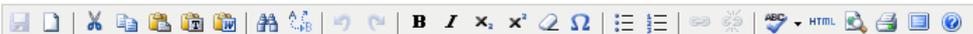| Academic Institution | UMANC | The University of Manchester |
Academic Plan	00268	BA(Hons) Italian Studies
Academic Year	2011	2011/12 Academic Year
Text Data Code	PLANFEES	Course Fees (Short Version)

Max: 1000

Fees for entry in 2011 have not yet been set. For entry in 2010, the tuition fees are £3,290 per annum for home/EU students, and are expected to increase slightly for 2011 entry. For general fee information, please visit: Undergraduate fees.

6. Once you have finished editing, you will need to click on the **Save** (disk) icon to verify your changes and return to the main page.

Edit HTML

Academic Institution	UMANC	The University of Manchester
Academic Plan	00268	BA(Hons) Italian Studies
Academic Year	2011	2011/12 Academic Year
Text Data Code	PLANFEES	Course Fees (Short Version)

Max: 1000
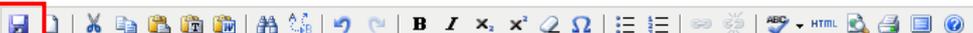
Fees for entry in 2012 have not yet been set. For entry in 2011, the tuition fees are £3,290 per annum for home/EU students, and are expected to increase for 2012 entry. For general fee information, please visit: Undergraduate fees.

7. Most text fields are also able to use **look-ups**, known as **Text Blocks**. This allows for a pre-defined piece of text to be set up and then pulled in via the look-up, without the need to type it in from scratch.

*How to Apply   SYS386   Max: 2000

Apply through UCAS.

8. A good example of this is the 'How to Apply' text. Clicking on the **look-up** provides a list of pre-defined text blocks for you to use.

9. Click on the Text Block Code Description you wish to use.

10. There is also a **Help Tip** facility set up for some fields (question mark icon) which will provide additional field information as the mouse is hovered across them.

11. Finally, the editing of a Draft does not have to be completed in one 'sitting'. You can save all changes thus far by clicking on the **Save** button at the foot of the main page, enabling you to close it down and re-access it at a later date to continue.

ⓘ   **NOTE:** *There is a Preview facility that will allow you to view your changes, exactly as they will appear on the final published webpages. You can use this as and when you make changes to ensure that you are happy with what you are doing. The use of this feature is detailed on page 19.*

Further Data Tabs

In addition to the tabs that appear both on the webpage and in Campus Solutions (as detailed on page 8), there are also some further tabs in Campus Solutions for you to use when updating publishing plan data.

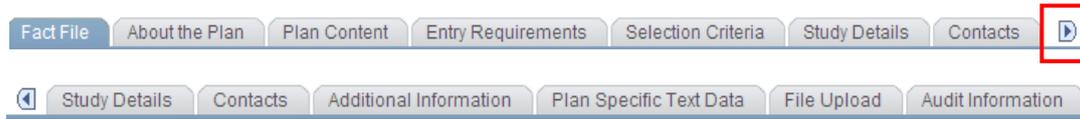To access them, click on the **More Tabs** icon as shown, to scroll across and reveal 4 other sections. These are *Additional Information, Plan Specific Text Data, File Upload and Audit Information*. You can then click on the **More Tabs** icon again to access the final section, *Audit Information*.

Additional Information

The top half of this page is simply a set of tick-boxes to denote where on the University webpages the course content should appear. For example, this plan below is selected to be available as a Combined Studies course, so in addition to the plan information appearing on the full A-Z listings by default, it will also be included in the specific 'Combined Studies' course listings.

The lower section of the page allows you to specify the following:

- **Linked Academic Plans** – View Only (these would be defined in the Plan set-up, elsewhere). Linked Plans are other academic plans that are able to adopt the same plan information. An example of this would be a plan that is offered both full time and part time – the part time plan may be linked to the full time plan. This information will then appear in the Course Options section at the foot of the published webpage. (In the example below there are no linked plans).
- **Other Related Academic Plans** – This allows you to specify any other related plans that may be of interest to the student, if they have similar content/aims.
- **Sources of Funding** – This allows you to specify one or more possible funding sources for the plan which are then able to be displayed as links on the final published webpage (on the Fact File tab), taking the user directly to the relevant section of the funding source information on the website. *Note that this is only applicable for PG courses at present.*
- **Keywords** – The use of this at the University has yet to be established.
- **Further Information** – Any additional information that is not able to be specified elsewhere.

Plan Specific Text Data

This section allows you to specify further information about the plan, for inclusion on the **School webpages only**. Text entered here will not be displayed on the main University course listings.

1. To use this feature, lookup an appropriate **Text Data Code** for the type of information you wish to enter.

2. Click on the **Add Text Data Code** button to insert this as an actual field on the page. You can then click on the HTML editor (notepad) icon to enter your text as detailed previously on page 10.

File Upload

This enables you to add a link to an additional document for inclusion on the published webpages (such as a sample timetable). You can upload a maximum of 5 documents.

1. Start by selecting the 'Document' radio button (ignore the 'Image' option, as this is not in use) and then click on the **Upload File** button.

2. Browse to the location of the document and then click on the **Upload** button. Files can be in either **DOC or PDF format** (although PDF is preferable). Each file must be **1 megabyte** in size (or smaller). After clicking 'Upload' there will be a short delay whilst a virus-scan takes place.

3. The file is then added. You must then change the **File Label** (the name of the link as it will appear on the webpage). This is to ensure that it is obvious to the user what the file is, without the help of surrounding text. You also have the option of adding a **File Description**, which can be used to give a full description of the file contents.

Audit Information

This section logs each stage of the publishing plan process (Draft, Approval, Publish, etc) with time, date & user. It also allows for you to enter your own comments for your own tracking purposes.

| Study Details | Contacts | Additional Information | Plan Specific Text Data | File Upload | Audit Information |

Academic Institution	UMANC	The University of Manchester
Academic Plan	00268	BA(Hons) Italian Studies
Academic Year	2011	2011/12 Academic Year

- The Comment section for your own use is in the top section of the page.

Find | View All   First ◄ 1 of 7 ► Last

Version	3.001	*Publishing Status 1. Draft
Effective Date	14/04/2011	Publish
Comment	Converted from SITS IPP Code UMBF1-H1R300	
	Sample Timetable added by Kim Graakjaer 14/4/2010	

1. The lower section of the page is where the automatic **Audit Information** will be displayed.
Each time publishing plan information crosses another stage in the process, it will be logged here.

Audit Information

Last Update User ID	mpcisse2	Last Published User ID	
Last Update Date/Time	14/04/2011 15:13:44	Last Published Date/Time	
Last Approved User ID		Deleted User ID	
Last Approved Date/Time		Deleted Date/Time	

ⓘ   **NOTE:** *There may be more than one record for a publishing plan, depending on version, so it may be necessary to scroll through these pages to get the complete history.*

Find | View All   First ◄ 1 of 7 ► Last

Version	3.001	*Publishing Status 1. Draft
Effective Date	14/04/2011	Publish

Comparing & Previewing

Comparing Versions

There is a facility to enable you to run a quick comparison between different versions of publishing plan information which you may find useful when editing.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan, as detailed on page 6.
2. Click on the **Compare** icon (resembling 2 sheets of paper), located just underneath the Publishing Status field. (This is available within each of the tabbed sections).

3. You will now be taken to a page where the existing **Version** (that you are working with) will be displayed at the top, along with a drop-down field for you to select the Version that you wish to compare this current one to. All published versions will be in whole numbers and drafts will be in decimals, as follows:

Version Number	Status
0.001	First Draft
1.000	First Published
1.001	Second Draft
2.000	Second Published
2.001	Third Draft
3.000	Third Published, and so on…

4. Click on the **Compare** button. A webpage will now open up (in a new window) displaying the differences between the two, highlighted by different coloured blocks.

Version: 3.001	
Version: 3.000	
Last modified: Thu, 14 Apr 2011 14:13:44 GMT	
Last modified: Tue, 18 Jan 2011 14:54:00 GMT	
Last modified by: mpcisse2	
Last modified by: MQBSSRSG	
Last approved:	
Last approved: Tue, 18 Jan 2011 14:56:10 GMT	
Last approved by:	
Last approved by: MQBSSRSG	
Last published:	
Last published: Tue, 18 Jan 2011 14:58:35 GMT	
Last published by:	
Last published by: MQBSSRSG	

Audit comments

Converted from SITS IPP Code UMBF1-H1R300

Converted from SITS IPP Code UMBF1-H1R300

Degree awarded: BA (Hons)
Degree awarded: BA
Duration: 4 Years
Duration: 4 years
Course fees: Element: feesShort - Unable to display element. Data must be XMTHL compliant - Exception: XML parser error CreateXmlDoc Fatal Error: at file Integration Server line: 1 column: 371 message: Expected an attribute value (159,5)
Course fees:
Fees for entry in 2011 have not yet been set. For entry in 2010, the tuition fees are £3,290 per annum for home/EU students, and are expected to increase slightly for 2011 entry. For general fee information, please visit: Undergraduate fees.

ⓘ   **NOTE:** Only the sections that have differences between the two compared versions will be displayed (this is not a preview of the final pages). In this example we can see that we have differences in the Course Description and the Subject Area.

Previewing Data

There is a facility to enable you to preview your publishing plan information, as it would appear on the published webpages, at any point.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan, as detailed on page 6.
2. Click on the **Preview** icon (resembling a sheet of paper with a pair of glasses), located just underneath the Publishing Status field. (This is available within each of the tabbed sections).

3. A webpage will now open up (in a new window) displaying the information that will appear on the final webpages.

ⓘ   **NOTE:** *You will see that the tabbed sections do not run across this Preview pane, as they would on the actual published webpage. Instead here they are listed one underneath another and so you will need to scroll down the page to view all the different sections.*

Approving & Publishing

Making 'Ready for Approval'

Once you have finished making your changes, you will need to set the draft to be approved. If you have access on the system as an 'Approver' yourself however, you may skip this step and move directly on to setting the status to be 'Approved', as detailed on page 21.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan, as detailed on page 6.

2. Change the Publishing Status to be 'Ready for Approval'

3. Click on the **Save** button at the foot of the screen.

Approving

This is the final stage prior to publishing. If you have access on the system as an 'Approver' yourself, you may apply this stage directly upon completing your draft.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan, as detailed on page 6. The status should be 'Ready for Approval', (unless you are applying this stage directly from the 'Draft' stage, if you are an 'Approver').

2. Change the Publishing Status to be 'Approved'.

3. Click on the **Save** button at the foot of the screen.

Publishing

Finally now, after approval, you are able to publish the plan information.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

1. Call up the publishing plan, as detailed on page 6. The status should be 'Approved'. Click on the **Publish** button.

2. You will be presented with a warning message to confirm that you wish to Publish. Click on the **Yes** button (or the **No** button if you wish to go back without publishing).

3. You will now be returned to the main page, with all of the information greyed out, as nothing else may now be amended.   The data should now update to the webpages immediately, but you can verify that everything has run successfully by clicking on the **Process Monitor** link.

4. This will then open up the Process List and your **User ID** should default in (enter it if not). Upon clicking on the **Refresh** button, you will be presented with your process(es). Eventually, you should see that the **Run Status is set to 'Success'**

Bulk Processing

Bulk Copy

You will start by searching for existing published plans and then proceed to run a process which will create new 'Draft' copies of them for you to work with.

 Navigate To: Student Recruiting > Publishing Plans > Process > Bulk Copy.

1. Click on the **Add a New Value** tab. (If you have already created a Run Control ID here previously, search for it on the 'Find an Existing Value' tab and proceed to step 3). Specify a **Run Control ID** (to refer to your bulk copy settings) and then click on the **Add** button.

Publishing Plans Bulk Copy
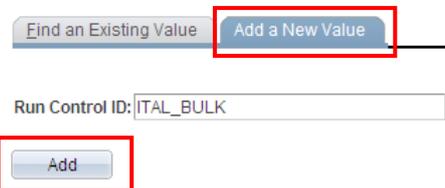
Find an Existing Value | Add a New Value

Run Control ID: ITAL_BULK

Add

2. You will be taken to the Bulk Copy page to specify your selection criteria. Enter the **Academic Organisation**; **Academic Career**; **Academic Year From** and **Academic Year To**.

3. The **Allow Overwrite** setting (Yes or No) determines whether or not you wish to overwrite existing Draft material. In other words, if within your selection of Published Plans retrieved there is a Plan that is already set to 'Draft', do you want the system to overwrite this existing Draft and create a new one as part of this bulk process. In the majority of cases it is assumed that you would set this to be 'Yes', but this is your decision.

4. Once done, click on the **Search** button.

Bulk Copy

Run Control ID: ITAL_BULK   Report Manager Process Monitor   Run

*Academic Institution   UMANC   The University of Manchester
*Academic Organization   4058   Italian Studies
*Academic Career   UGRD   Undergraduate
*Academic Year From   2011
 Publishing Status From   Published
*Academic Year To   2011
 Publishing Status To   Draft
*Allow Overwrite   Yes

Search   Reset

5. You should then have returned a list of Published Plans matching your selection criteria.

	Academic Plan	Formal Description	Published By	Published Dttm
☐	00077	BA (Hons) Modern Language and Business & Management (Italian)	MQBSSRSG	18/01/2011 14:57:49
☐	00216	BA(Hons) English Literature and a Modern Language (Italian)	MQBSSRSG	18/01/2011 14:58:16
☐	00223	BA(Hons) European Studies and Modern Languages (Italian)	MQBSSRSG	18/01/2011 14:58:20
☐	00254	BA(Hons) History of Art and a Modern Language (Italian)	MQBSSRSG	18/01/2011 14:58:29
☐	00259	BA(Hons) History and Italian	MQBSSRSG	18/01/2011 14:58:32

6. You can individually select which plans you wish to create Draft copies of; or you can select them all by clicking on the **tick** icon. You can also de-select them all by clicking on the **un-tick** icon.

7. Once satisfied with your selection, click on the **Run** button at the top of the page.

8. You will then be taken through to the **Process Scheduler Request** page where your process will be listed. Click on the **Ok** button to confirm that you wish to run that process and then be returned to the main Bulk Copy page.

9. You will now need to click onto the **Process Monitor** link.

Bulk Copy

Run Control ID: ITAL_BULK   Report Manager   Process Monitor   Run

Process Instance:2937277

10. The **Process Monitor** is where you can view the status of any processes running. Ensure that your **User ID** is specified and then click on the **Refresh** button until your process is listed with a **Run Status** of 'Success'.

11. Your process should now be completed, but you can verify this by clicking on the **Details** link to take you to the **Process Detail** page.

Process List   Server List

View Process Request For

User ID: mpcisse2   Type: Last   1   Days   Refresh
Server: Name: Instance: to
Run   Distribution   ☑ Save On Refresh
Status: Status:

Process List   Customize | Find | View All | | First ◄ 1-2 of 2 ► Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	2937277		Application Engine	UMPRC051	mpcisse2	15/04/2011 11:19:46 BST	Success	Posted	Details

12. Click on the **View Log/Trace** link to take you to a list of process log files.

Actions

Parameters   Transfer
Message Log   View Locks
Batch Timings
View Log/Trace

13. Click on the **Report.txt** link to open up a report of the process for you to check through.

File List

Name	File Size (bytes)	Datetime Created
AE_UMPRC051_2937277.stdout	290	15/04/2011 11:22:26.820095 BST
Report_2937277.txt	1,053	15/04/2011 11:22:26.820095 BST

```
***********************************
* * * BEING BULK COPY REPORT * * *
***********************************

The following report is for the Bulk Copy Process
Process Instance:    2937277
Operator ID:         mpcisse2
Run Control ID:      ITAL_BULK
```

ⓘ   **NOTE**: You may also wish to check your Plans in the Marketing Information pages to verify that they have indeed had new Draft copies created.

Bulk Update

This is where you will now apply the updates & changes to the plan data.

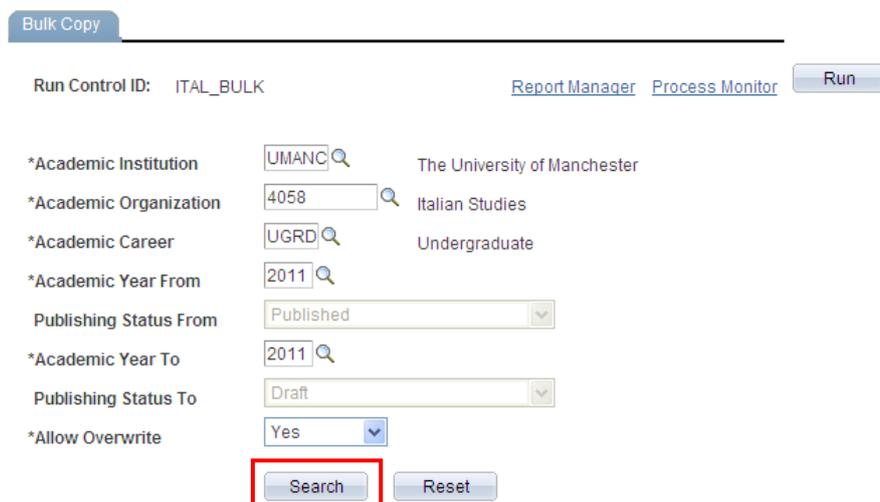**Navigate To: Student Recruiting > Publishing Plans > Process > Bulk Update.**

1. Click on the **Add a New Value** tab. (If you have already created a Run Control ID here previously, search for it on the 'Find an Existing Value' tab and proceed to step 3). Specify a **Run Control ID** (to refer to your bulk update settings) and then click on the **Add** button.

    Publishing Plans Bulk Update

    Find an Existing Value | Add a New Value

    Run Control ID: ITAL_UPDATE

    Add

2. You will be taken to the Bulk Update **Select Records** tab to specify your selection criteria. Enter the **Academic Organisation**; **Academic Career**; and **Academic Year** (the **Effective Date** will default to today's date). Click on the **Search** button.

    Select Records | Select Fields | Edit Fields

    Run Control ID: ITAL_UPDATE   Report Manager   Process Monitor   Run

    *Academic Institution   UMANC   The University of Manchester
    *Academic Organization   4058   Italian Studies
    *Academic Career   UGRD   Undergraduate
    *Academic Year   2011
    Publishing Status   Draft
    *Effective Date   15/04/2011

    Search   Reset

3. You should retrieve the same list of course as you did previously. Use the **tick-boxes** to select the plans that you wish to update.

    | Select Marketing Records | | Customize \| Find \| First 1-3 of 3 Last | |
Academic Plan	Formal Description	Updated By	Update Dttm
☑ 00077	BA (Hons) Modern Language and Business & Management (Italian)	mpcisse2	15/04/2011 11:22:14
☑ 00216	BA(Hons) English Literature and a Modern Language (Italian)	mpcisse2	15/04/2011 11:22:15
☑ 00223	BA(Hons) European Studies and Modern Languages (Italian)	mpcisse2	15/04/2011 11:22:14

4. Click across to the next tab, **Select Fields**.

    Select Records | Select Fields | Edit Fields

    Run Control ID: ITAL_UPDATE   Report Manager   Process Monitor   Run

5. Here you will be able to select the fields that you wish to update, using the **tick-boxes**.

6. Now click across to the Edit Fields tab. Here you will see that you are now able to edit your selected fields.

7. Using **Text Blocks** and/or the **HTML Editor**, proceed to define the information in the fields.

8. Once done, click on the **Run** button.

9. You will then be taken through to the **Process Scheduler Request** page where your process will be listed. Click on the **Ok** button to confirm that you wish to run that process and then be returned to the previous page.

10. You will now need to click onto the **Process Monitor** link.

11. The **Process Monitor** is where you can view the status of any processes running. Ensure that your **User ID** is specified and then click on the **Refresh** button until your process is listed with a **Run Status** of 'Success'.

12. Your process should now be completed, but you can verify this by clicking on the **Details** link to take you to the **Process Detail** page.

13. Click on the **View Log/Trace** link to take you to a list of process log files.

14. Click on the **Report.txt** link to open up a report of the process for you to check through.

File List		
Name	File Size (bytes)	Datetime Created
AE_UMPRC054_2937312.stdout	290	15/04/2011 13:31:15.140048 BST
Report_2937312.txt	1,394	15/04/2011 13:31:15.140048 BST

```
*************************************
* * * BEGIN BULK UPDATE REPORT * * *
*************************************

The following report is for the Bulk Update Process
Process Instance: 2937312
Operator ID:      mpcisse2
Run Control ID:   ITAL_UPDATE


*************************************
* * *   PLAN SEARCH CRITERIA   * * *
*************************************

Institution:     UMANC
Acad Org:        4058
Acad Year:       2011
Status:          DFT
Effective Date:  2011-04-15


*************************************
* * *        ACADEMIC PLANS      * * *
*************************************

Plans that were updated
-----------------------
00077 - BA (Hons) Modern Language and Business & Management (Italian)
00216 - BA(Hons) English Literature and a Modern Language (Italian)
00223 - BA(Hons) European Studies and Modern Languages (Italian)


*************************************
* * *          FIELDS            * * *
*************************************

Fields that were updated on the plans listed above
```

ⓘ   **NOTE**: You may also wish to check your Plans in the Marketing Information pages to verify that they have indeed now been updated.

Bulk Status Change

This is where you will now change the status of the publishing plan from 'Draft' to 'Ready for Approval' (or 'Approved').

Navigate To: **Student Recruiting > Publishing Plans > Process > Bulk Status Change.**

1. Click on the **Add a New Value** tab. (If you have already created a Run Control ID here previously, search for it on the 'Find an Existing Value' tab and proceed to step 3). Specify a **Run Control ID** (to refer to your bulk status change settings) and then click on the **Add** button.

2. You will be taken to the Bulk Status Change page to specify your selection criteria. Enter the **Academic Organisation**; **Academic Career**; and **Academic Year**.

3. Click on the **Search** button. This should then return the set of publishing plans that you have been working with thus far.

4. Select the appropriate **Status From** and **Status To** (probably from 'Draft' to either 'Ready for Approval' or Approved') and then select the publishing plans that you wish this status change to be applied to.

5. Click on the **Run** button to take you to the **Process Scheduler Request** page where your process will be listed. Click on the **Ok** button to confirm that you wish to run that process and then be returned to the previous page.

6. You will now need to click onto the **Process Monitor** link.

7. The **Process Monitor** is where you can view the status of any processes running. Ensure that your **User ID** is specified and then click on the **Refresh** button until your process is listed with a **Run Status** of 'Success'.

8. Your process should now be completed, but you can verify this by clicking on the **Details** link to take you to the **Process Detail** page.

9. Click on the **View Log/Trace** link to take you to a list of process log files.

Actions	
Parameters	Transfer
Message Log	View Locks
Batch Timings	
View Log/Trace	

10. Click on the **Report.txt** link to open up a report of the process for you to check through.

File List		
Name	File Size (bytes)	Datetime Created
AE_UMPRC049_2937316.stdout	290	15/04/2011 13:53:39.660170 BST
Report_2937316.txt	876	15/04/2011 13:53:39.660170 BST

```
**********************************************
* * * BEGIN BULK STATUS CHANGE REPORT * * *
**********************************************

The following report is for the Bulk Status Change Process
Process Instance: 2937316
Operator ID:      mpcisse2
Run Control ID:   ITAL_STATUS


**********************************************
* * *      RUN CONTROL PARAMETERS      * * *
**********************************************

Institution:
Academic Org :
Academic Year:
Status From:
Status To:
```

ⓘ **NOTE**: *You may also wish to check your Plans in the Marketing Information pages to verify that they have indeed now had their statuses changed.*

Bulk Publish

This process will locate all your publishing plans that are set to be 'Approved' and then proceed to publish them.

Navigate To: Student Recruiting > Publishing Plans > Process > Bulk Publish.

1. Click on the **Add a New Value** tab. (If you have already created a Run Control ID here previously, search for it on the 'Find an Existing Value' tab and proceed to step 3). Specify a **Run Control ID** (to refer to your bulk publish settings) and then click on the **Add** button.

2. You will be taken to the Bulk Publish page to specify your selection criteria. Enter the **Academic Organisation**; **Academic Career**; **Academic Year** and **Publishing Status** (this will be 'Approved').

3. Click on the **Search** button. This should then return the set of publishing plans that you have been working with thus far.

4. Select the publishing plans that you wish to proceed to publish and then click on the **Run** button.

5. This will take you to the **Process Scheduler Request** page where your process will be listed. Click on the **Ok** button to confirm that you wish to run that process and then be returned to the previous page.

Process Scheduler Request

User ID: mpcisse2   Run Control ID: ITAL_PUBLISH

Server Name: Run Date: 15/04/2011
Recurrence: Run Time: 15:39:27   Reset to Current Date/Time
Time Zone:

Process List
Select | Description | Process Name | Process Type | *Type | *Format | Distribution
☑ | Bulk Status Update | UMPRC049 | Application Engine | Web | TXT | Distribution

OK   Cancel

6. You will now need to click onto the **Process Monitor** link.

Bulk Status Change

Run Control ID: ITAL_PUBLISH   Report Manager   Process Monitor   Run

Process Instance:2937409

7. The **Process Monitor** is where you can view the status of any processes running. Ensure that your **User ID** is specified and then click on the **Refresh** button until your process is listed with a **Run Status** of 'Success'.

Process List | Server List

View Process Request For

User ID: mpcisse2   Type: Last   1   Days   Refresh
Server: Name: Instance: to
Run Status: Distribution Status: ☑ Save On Refresh

Process List   Customize | Find | View All | First 1-6 of 6 Last

Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details
☐ | 2937409 | | Application Engine | UMPRC049 | mpcisse2 | 15/04/2011 15:39:27 BST | Success | Posted | Details

8. Your process should now be completed, but you can verify this by clicking on the **Details** link to take you to the **Process Detail** page.

9. Click on the **View Log/Trace** link to take you to a list of process log files.

Actions

Parameters   Transfer
Message Log   View Locks
Batch Timings
View Log/Trace

10. Click on the **Report.txt** link to open up a report of the process for you to check through.

File List		
Name	File Size (bytes)	Datetime Created
AE_UMPRC049_2937409.stdout	290	15/04/2011 15:40:27.362293 BST
Report_2937409.txt	1,094	15/04/2011 15:40:27.362293 BST

```
*********************************************
* * * BEGIN BULK STATUS CHANGE REPORT * * *
*********************************************

The following report is for the Bulk Status Change Process
Process Instance: 2937409
Operator ID:      mpcisse2
Run Control ID:   ITAL_PUBLISH


*********************************************
* * *     RUN CONTROL PARAMETERS     * * *
*********************************************

Institution:      UMANC
Academic Org :    4058
Academic Year:    2011
Status From:      RFA
Status To:        APP


*********************************************
* * *             REPORT BODY         * * *
*********************************************

The following plans had their status changed
---------------------------------------------
00077 - BA (Hons) Modern Language and Business & Management (Italian)
00216 - BA(Hons) English Literature and a Modern Language (Italian)
00223 - BA(Hons) European Studies and Modern Languages (Italian)
```

ⓘ   **NOTE**: You may wish to check the webpages to see if the updated plans have been published. In most cases the publishing should be fairly instant, unless new indexes need to be created or removed, in which case updates will occur overnight.

Further Features

Creating a Text Block

Text Blocks are pre-defined blocks of text. Once set up, they can then be accessed via a look-up table and re-used to save you from entering the same piece of text several times over.

Navigate To: Student Recruiting > Publishing Plans > Set Up > Text Block Codes.

1. Click on the **Add a New Value** tab.

2. Look-up and enter a **Text Data Code**, (this refers to the category of Text Block you are going to add). You will also need to enter a **Text Block Code** to define your text block. In the example below we are adding a text block containing fee information for the School of Law, so a Text Block Code beginning with the letters 'LAW' has been specified.

ⓘ   *NOTE: You should always create your Text Blocks with a code beginning with the 3-character reference assigned to your school. These are detailed on page 48.*

3. Once done, click on the **Add** button to be taken to the Text Block Codes page.

4. The **Effective Date** will default in. Enter a **Description** of your Text Block.

5. Click on the **Notepad** icon to open up the HTML Editor to enter your text into.

6. Enter your text in the box provided. Once done, click on the **Save** button (disk icon).

7. You will no be returned to the main page where you will need to click on the **Save** button at the foot of the screen.

Editing an Existing Text Block

Text Blocks are pre-defined blocks of text. Once set up, they can then be accessed via a look-up table and re-used to save you from entering the same piece of text several times over. You may at times need to edit one of your Schools Text Blocks. See the note about updating Text Blocks in the **Final Pointers** section at the end of the document.

Navigate To: Student Recruiting > Publishing Plans > Set Up > Text Block Codes.

1. Enter the required **Text Block Code** as your search criteria and click on the **Search** button. You should find that all of your own Schools Text Blocks begin with the 3-character reference assigned to your School, as detailed on page 48. Select your required Text Block from the returned list (if applicable).

2. You will then be presented with the existing Text Block configuration. Click on the **little plus sign** to insert a new row.

3. This will have an **Effective Date** of today's date and will replicate the existing information, ready for editing.

4. Now proceed to edit the text via the **HTML Editor** and save your changes to completion, as detailed in steps 5-7 on page 38.

Exporting Data

Campus Solutions offers you the facility to export the Publishing Plan data (in the form of an XML file) to then use as you wish (say, to import into Excel or Word). This session covers how to export the data from Campus Solutions, but does not elaborate on what to do with the extracted data thereafter.

Navigate To: Student Recruiting > Publishing Plans > Process > Bulk Extract.

1. Enter the **Institution**; **Acad Org**; **Career** and **Academic Year** required to identify the Publishing Plans that you wish to extract.

2. You will also need to select which **Version** you wish to extract - either the last **Published** version or the **Latest** version (the latest version could be a new draft copy for example).

3. Click on the **Search** button to return a list of corresponding Publishing Plans.

4. Use the **tick-boxes** to select which Publishing Plans you actually wish to extract and then click on the **Export** button.

5. You will be presented with a message on-screen asking you to confirm your actions by clicking the **Ok** button.

6. You will now be asked whether you wish to open the file directly or save it. Choose to **Save**.
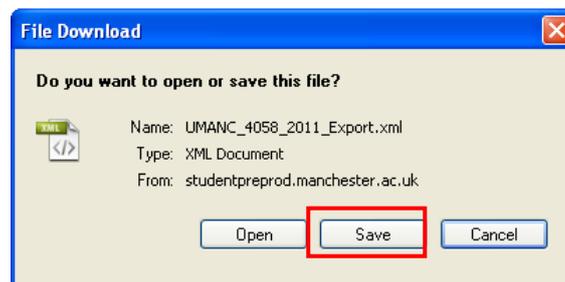
7. You will now be presented with a standard Windows **Save As** dialogue box to enable you to save the file to your chosen location and choose an appropriate filename.

8. When you now access the **XML file** it will look similar to that shown below. You can now import this file into another application (such as Excel or Word) for further use.
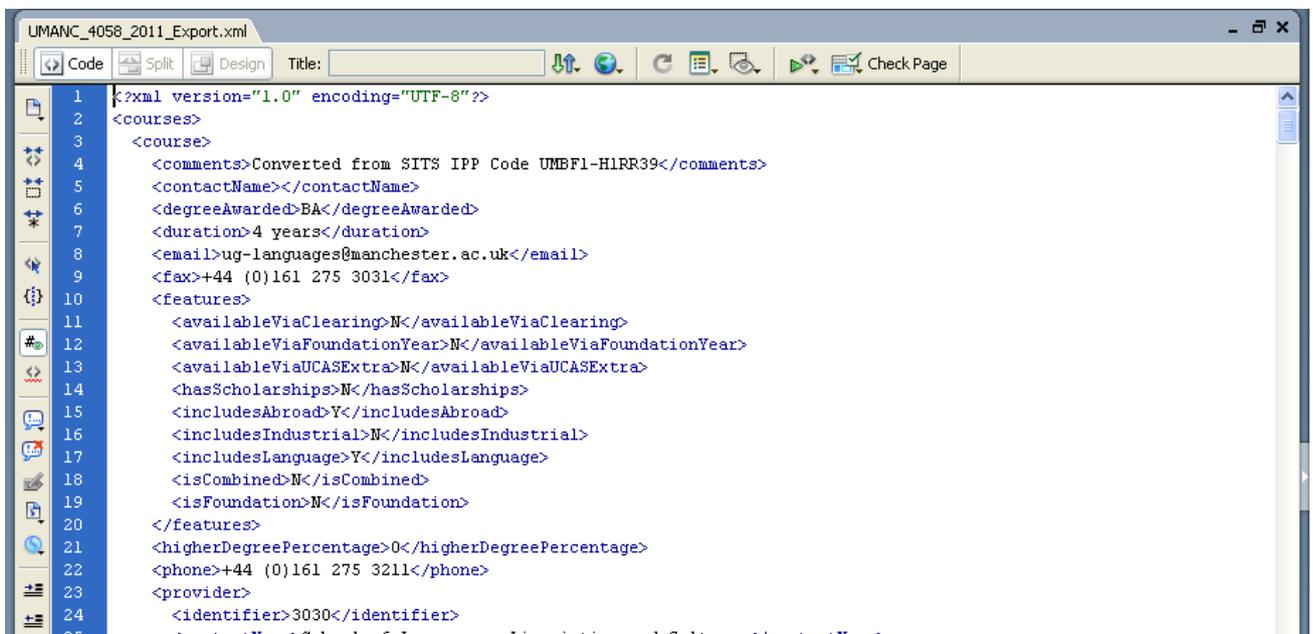
Linked Plans

As part of the Publishing Plan settings, you can specify that some plans are 'linked' to others, so that they adopt the same publishing plan information. Examples of this would be where a plan is offered both full-time and part-time and the part-time plan is linked to the full-time plan; or where there are other qualification outcomes (such as Postgraduate Certificate and Postgraduate Diploma) and the two are linked together. On the final published webpage the full-time plan would then be listed as having an equivalent part-time option, as part of the Course Options section at the foot of the page.

Navigate To: Student Recruiting > Publishing Plans > Setup > Academic Plan Settings.

1. Enter some criteria to locate your chosen plan (either by entering the plan code directly or using the look-up) and then click on the **Search** button.

Academic Plan Settings

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	Add a New Value

Limit the number of results to (up to 300): 300

Academic Institution: begins with

Academic Plan: begins with 04269

Plan Title (Web): begins with

☐ Include History   ☐ Correct History   ☐ Case Sensitive

Search   Clear   Basic Search   💾 Save Search Criteria

2. You will then be taken to the **Academic Plan Settings** page. You will see here that we have accessed a full-time plan for MSc Environmental Biotechnology, which currently has 5 linked plans.

Academic Plan Settings

Institution	The University of Manchester
Academic Plan	04269 MSc Environmental Biotechnology
Mode of Attendance	Full-time

Find | View All First ◄ 1 of 1 ► Last

*Effective Date 07/08/2007   *Status Active

*Plan Title (Web) Environmental Biotechnology MSc

Linked Plans   Customize | Find | 📊 📋 First ◄ 1-5 of 5 ► Last

	*Plan Code	Description	Mode of Attendance		
1	07365 🔍	MSc Environmental Biotechnology	Part-time	➕	➖
2	07366 🔍	PG Diploma Environmental Biotechnology	Full-time	➕	➖
3	07367 🔍	PG Diploma Environmental Biotechnology	Part-time	➕	➖
4	07368 🔍	PG Certificate Environmental Biotechnology	Full-time	➕	➖
5	07369 🔍	PG Certificate Environmental Biotechnology	Part-time	➕	➖

3. To link another plan, simply click on the **little plus sign** (in the upper section of the screen) to insert a new effective dated section. You can then enter the plan code in the **Linked Plans** section and then click on the **Save** button to complete.

4. When the Plan is next Published, it will now display all of the available options within the **Course Options** section at the foot of the page.

5. When you have linked plans together, remember to also go and update the 'master' plan **Marketing Information** with all of the available options for the linked courses. For example, you may now need to update the 'Duration'; 'Fees' and 'Entry Qualifications' fields (amongst others) so that there is information on all available plan options (as shown on the published webpage below).

Degree awarded: MSc, PG Diploma, PG Certificate
Duration: MSc FT - 12 months, PT up to 60 months
Entry requirements: MSc - At least a 2(ii) (lower second class honours) degree or equivalent in a relevant subject. Postgraduate Diploma - At least a third class degree or equivalent in a relevant subject Postgraduate Certificate - Any degree (or equivalent) in a relevant subject. Applicants without prior formal qualifications will be considered taking into account a combination of career experience and performance in Units attended as individual training courses Examples of relevant disciplines for your first degree are: analytical chemistry, analytical science, bioscience, biochemistry, bioengineering, chemical engineering, chemistry, electronic engineering, electrical engineering, environmental technology, food science, manufacturing engineering, mathematics, offshore engineering, petroleum engineering, pharmacology, pharmacy, physics and process engineering. Please enquire about the relevance of your first degree or career experience.
Course fees:
For the 2008/09 academic year the tuition fees are as follows for all students.

- MSc – £13,480
- Postgraduate Diploma – £13,480
- Postgraduate Certificate – £6,740
- Individual Unit – £1,685

New Plans

When a new Academic Plan is created in Campus Solutions, this will need to have a Publishing Plan record created against it so that it can be advertised along with the other plans, on the university website.

Navigate To: Student Recruiting > Publishing Plans > Setup > Academic Plan Settings.

1. Click across to the **Add a New Value** tab and enter the Academic Plan code that you wish to create the publishing plan record for (you can use the look-up to search for this if you wish). Click on the **Add** button.

2. You will then be taken to the **Academic Plan Settings** page. Here you will need to specify any linked plan information (as detailed in the previous section from page 42). If there are no linked plans to enter, simply click on the **Save** button.

Navigate To: Student Recruiting > Publishing Plans > Marketing Information.

3. Click across to the **Add a New Value** tab and enter the Academic Plan code (you can use the look-up to search for this if you wish), along with the Academic Year you wish to create the publishing record for. Click on the **Add** button.

4. You will now be taken through to the Marketing Information page for this new plan, in a first draft mode (Version 0.001 - as no previous published version exists). You can now proceed to enter the information across the tabbed sections (as detailed in the Publishing Plans training guide) and work through to publish the information.

Additional Content

Creating Publishing Plans for the next Academic Year

You can use the Bulk functionality to create Publishing Plans for the following academic year. To do this, when creating new 'Draft' copies at the Bulk Copy stage – simply enter the forthcoming academic year in the **Academic Year To** field, as shown below.

Navigate To: Student Recruiting > Publishing Plans > Process > Bulk Copy.

1. Click on the **Add a New Value** tab. (If you have already created a Run Control ID here previously, search for it on the 'Find an Existing Value' tab). Specify a **Run Control ID** (to refer to your bulk copy settings) and then click on the **Add** button.

(i) **NOTE**: *This is essentially the same process as that covered in the Bulk Copy section of the guide, as detailed from page 24.*

2. You will be taken to the Bulk Copy page to specify your selection criteria. Enter information as you would do for the usual Bulk Copy process, however specify the **Academic Year To** as the next sequential year (eg: instead of copying from 2010 to 2010 to make copies of the 2010 records; instead copy from 2010 to 2011 to create new 2011 records based on the existing 2010 set-up).

3. **Continue with the Bulk Copy 'Run' Process** as detailed from page 24. This will then create new 'Draft' copies (copies of the current years records) and set them to be for the following academic year (2011 in our example).

Text Block School Codes

Here is a list of 3-character reference codes for which should always be used at the start of the coding for any new Text Blocks that are created.

Faculty / School / Area	Code
Combined Studies Centre	CST
Manchester Business School	MBS
Faculty of Life Sciences	LSC
School of Arts, Histories and Cultures	AHC
School of Chemical Engineering and Analytical Sciences	CES
School of Chemistry	CHM
School of Computer Science	CSC
School of Dentistry	DEN
School of Earth, Atmospheric and Environmental Sciences	EAS
School of Education	EDU
School of Electrical and Electronic Engineering	EEE
School of Environment and Development	SED
School of Languages, Linguistics and Cultures	LLC
School of Law	LAW
School of Materials	MAT
School of Mathematics	MTH
School of Mechanical, Aerospace and Civil Engineering	MAC
School of Medicine	MED
School of Nursing, Midwifery and Social Work	NUR
School of Pharmacy and Pharmaceutical Sciences	PHM
School of Physics and Astronomy	PHY
School of Psychological Sciences	PSY
School of Social Sciences	SOC

Final Pointers

As we have now come to the end of the training session, here are a few final points to note about the Publishing Plans module in Campus Solutions:

1. You can only update Publishing Plan information for your own school

2. Changes can only be made to a publishing plan when it is in **Draft** status

3. Remember to make use of the **Preview** facility as you are making changes

4. **Effective Dates** in this module are only used to ensure the latest versions of any **Text Blocks** (look-up values) are used. Effective Dates here DO NOT control the entire publishing plan.

5. When publishing, ensure that you only click on the **Publish** button once.

6. When running processes, ensure that you only click on the **Run** button once.

7. Ensure that a process step has completed successfully before moving onto the next stage. If a process does not run to **Success**, click on the **Details** link to find out where the problem lies.

8. When editing **Text Blocks**, only ever edit Text Blocks for your own School. **NEVER** edit Text Blocks beginning with the characters 'SYS' as these are system/central Text Blocks.

9. When you have edited an existing Text Block, be aware that this **WILL NOT** automatically update the text on any plan using this same block, as Text Blocks, along with the Publishing Plans themselves are **Effective Dated**. The Publishing Plans will need to be updated in order to reflect a new Effective Date which will in turn then incorporate the latest edition of the Text Block. You can do this as follows:

    o **In Bulk** – Follow the steps as outlined in this guide, creating new drafts and then going on to edit/update. At the editing stage, select the field for which you need to pull in the new Text Block and then select this Text Block Code. Continue to amend the status and then publish in bulk.
    o **Singularly** – Call up the Publishing Plan individually (as covered in the Publishing Plans training guide) and create a new draft version. This new draft will be dated with today's date and so you should then see that the updated version of the Text Block will have pulled in for you. You can therefore save this as is (assuming no additional changes are required) and continue to approve and publish singularly.

10. **Requesting Access** - To request access to the Publishing Plans module, please complete the online BAS Access Request form, available via the following link:

http://www.itservices.manchester.ac.uk/trainingcourses/corporateapplications/campus/access/

Funding Sources Introduction

Just as prospective students are constantly browsing the University web pages for information on the Academic Programs & Plans we offer, they also look for information relating to any sources of funding for their studies (such as Scholarships and Bursaries) that they may be eligible for. This 'Funding Source' information therefore needs to be actively maintained so that the most up-to-date information is always available to them.
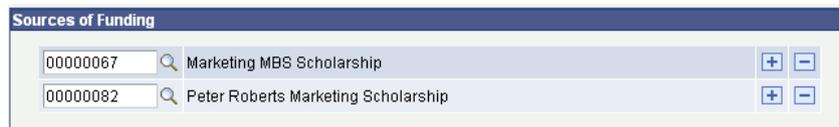
The Funding Sources module in Campus Solutions has been specifically designed to the requirements of the University, enabling users to update the information easily and efficiently and then automatically uploading any new data to the website on a daily basis (including updating the Postgraduate Funding search facility), without any other intervention.

Those of you already familiar with the Publishing Plans aspect of Campus Solutions will find this module very intuitive as it is built around the same principles and functions; however this module does have some key differences in that it does not make use of Version Numbers or the Draft/Approved/Published status sets.

How does this module interact with the Publishing Plans component?

A new field has been added into the Publishing Plans component entitled 'Sources of Funding'. This now allows you to link a plan directly to one or more relevant funding sources. This in turn means that on the final published webpage (of Publishing Plan data) one or more links will appear underneath a heading of 'Scholarships/sponsorships', allowing the user to move directly from the Plan information to further details of any relevant funding.

This is where the real advantage is, from a marketing perspective – providing a direct link from an academic plan to its relevant funding sources.

*The new 'Sources of Funding' field within the Publishing Plans component*

An excerpt from a published webpage, showing links to the Funding Source data

Viewing Funding Sources on the Website

- You can view the existing published Funding Sources data on the University website. Navigating from the main University Postgraduate Homepage (http://www.manchester.ac.uk/postgraduate/) to your relevant area (PGT/PGR) and then to the 'Funding' section. This displays a search facility that displays all published Funding Sources and allows you to search by level of study, subject area and nationality; or simply display all sources.

ⓘ **NOTE:** *Currently, detailed information about individual funding sources is only provided at Postgraduate level.*
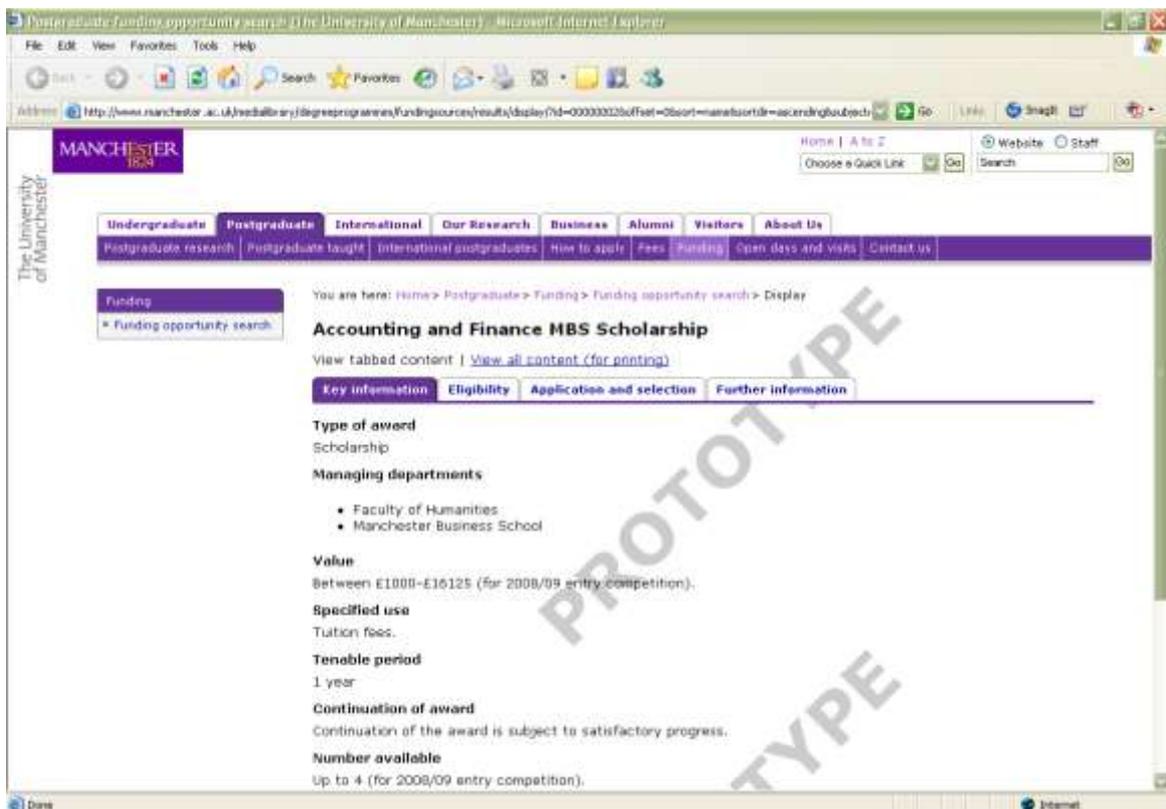
- You will see that information about different aspects of the funding source is displayed under numerous headings (Type of Award, Value, etc). These headings translate directly to Campus Solutions, making them the fields that you will use to update the information. So for example, to change the 'Value' information on the webpage you would need to update the information held in the 'Value' field for the corresponding Funding Source in Campus Solutions.

- If you now look to the URL at the top of the page, you will see that a section of it says **id=**. This relates to the **Funding Source ID** (in Campus Solutions) for that particular set of funding source data. So for example, in the screenshot shown below, the Funding Source ID is 00000002.

- This means that you can locate the information on the website that you wish to update, **Copy** this numeric value and then **Paste** this into the Campus Solutions search dialog (as shown over the page) in order to locate the corresponding information easily, ready for you to amend.

Editing Information

Calling up the Funding Sources Data

After having identified the changes you wish to make from the web-page, copy the Funding Source ID from within the web address (as shown on the previous page) so that you can use it to search as detailed below.

Navigate To: Student Recruiting > Funding Sources > Funding Information.

4. Copy in the **Funding Source ID** and then click on the **Search** button. (The Academic Organization value will default in, as you will only have access to update records for your own school).

Funding Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

Limit the number of results to (up to 300): 300

Academic Institution:	begins with	UMANC
Funding Source ID:	begins with	00000002
Formal Title of Funding Source:	begins with	
Academic Organization:	begins with	1000

☑ Include History   ☐ Correct History   ☐ Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

5. The funding sources information will then be displayed. You will also notice that there is an **Effective Date** and **Status** displayed, along with the familiar Navigation Bar to scroll between records. This allows you to verify that you are viewing the most recent data.

| Key Data |

Academic Institution   UMANC   The University of Manchester
Funding Source ID   00000002

Find | View All   First ◄ 1 of 7 ► Last

Effective Date 09/12/2009   Status Active

*Formal Title of Funding Source
Accounting and Finance MBS Scholarship

*Type of Award   Scholarship
*Owner   3016   Manchester Business School
*Managing Dept(s)   2001   Faculty of Humanities
    3016   Manchester Business School

*Value
£3000 contribution towards tuition fees (for 2010/11 entry competition).

*Tenable Period
1 year

6. To aid you in navigating around the **Key Data** tab to locate specific fields, below is a reference table showing all of the editable fields available within the tabbed section:

Funding Sources Section Tab Reference Table

Tabbed Section	Fields Available	Special Notes
Key Data	Effective Date Status Title Type of Award Owner Managing Depts Value Tenable Period Continuation Specified Use Number Available Funding Provider	See page 24 for explanation of the difference between 'Owner' and 'Managing Depts'.

Adding a New Row

Each time an update is required to a set of funding sources data, a new 'row' of information will need to be created with a corresponding Effective Date.

Navigate To: Student Recruiting > Funding Sources > Funding Information.

12. Call up the funding source data, as described on page 6.

13. Click on the **little plus sign** at the right-hand side of the page to insert a new Effective Dated row. You should see that today's date is now present in the Effective Date field and that you have an extra 'page' showing on the Navigation Bar (in this example '1 of 8' as opposed to the previous '1 of 7').

14. This is the systems way of keeping track of the latest **version** of the data – it simply 'looks' to the most recent Effective Date. By adding a new dated section you are telling the system that you are about to make changes to the data, applicable from this date forward. You can now begin to amend information across the various tabs, using the various editing methods discussed over the coming pages.

Amending Field Values

1. To change a **field value**, click on the look-up icon (magnifying glass) to be presented with a new list of values to select from. Once the new value has been selected it will then appear in the field, in place of the previous one.

2. To change **basic entry text fields**, simply delete and re-enter the relevant data.

3. For **bigger blocks of text**, there is an **HTML editing facility**. Clicking on this notepad icon will open up a full text entry and editing facility – allowing you to format the text exactly as you wish for it to appear on the final webpage, using standard Microsoft Word functionality – including **bullet points, numbered lists, italics and hyperlink text**.
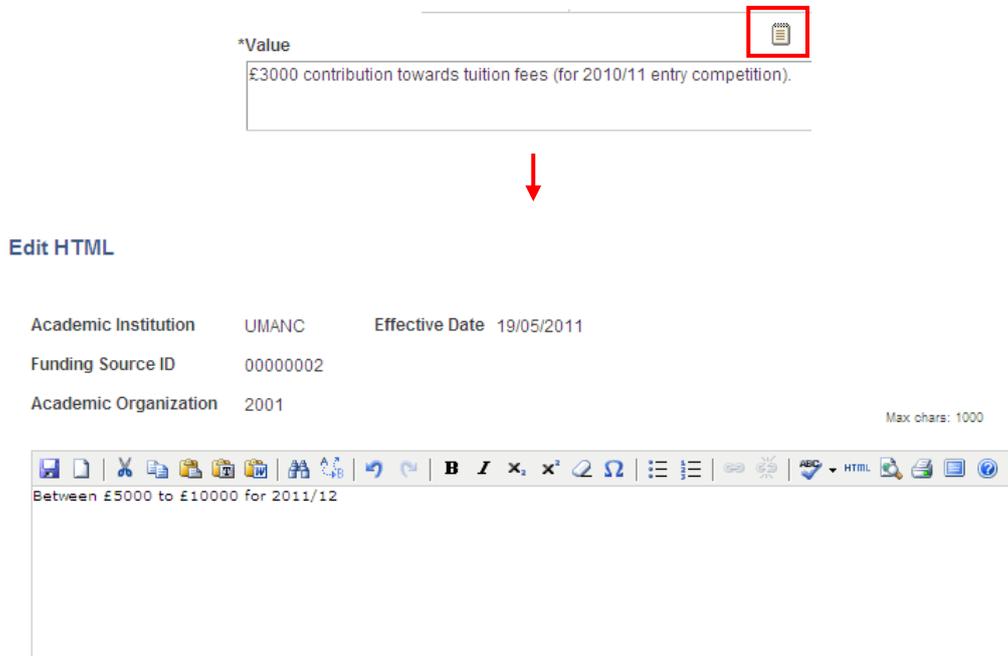
4. Once you have finished editing, you will need to click on the **Save** (disk) icon to verify your changes and return to the main page. If you wish to discard your changes, click the **Cancel** button instead.

5. Some other field values are selected via a simple **drop-down menu**.

6. Finally, there is a **Help Tip** facility set up for some fields (question mark icon) which will provide additional field information as the mouse is hovered across them.

Saving Data

Because the Funding Sources module uses Effective Dating (by adding a new 'Effective Dated' row in order to begin editing); once you click on the **Save** button all edits thus far will be 'logged' to that particular date.

If you navigate away from the Funding Sources page after saving, you will NOT then be able to re-access the same page on the same date and continue editing. This is because in order to edit, you need to add an Effective Dated row, and it is not possible to add more than one row for the same date.

**You should try to make all of your changes in 'one sitting' without navigating away from the page**

In a nutshell... You can edit and save repeatedly whilst within the Funding Sources component, but once you move away from that page, you will not then be able to edit the same data again until the following day

Comparing & Previewing

Comparing Versions

There is a facility to enable you to run a quick comparison between different versions of funding source data which you may find useful when editing. Note that these functions will only be available once you have made a change to the record and saved.

5. Click on the **Compare** icon (resembling 2 sheets of paper), located just underneath the Navigation Bar. (This icon is available within each of the tabbed sections of the page).
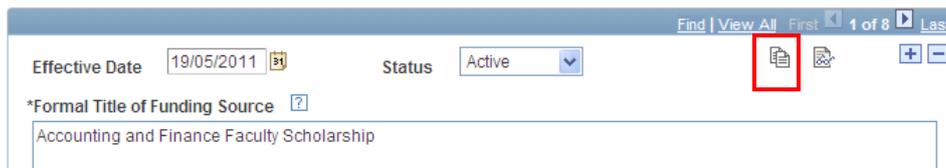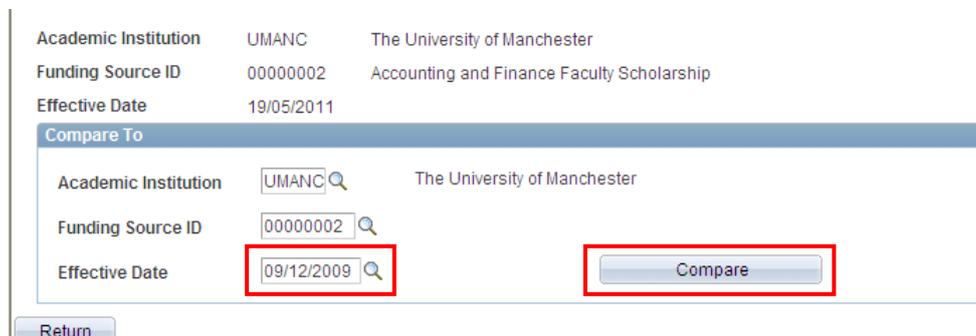

6. You will now be taken to a page where the latest version that you are working with (identified by the **Effective Date**) will be displayed at the top, along with some options for the previous version(s) you wish to compare it to below.
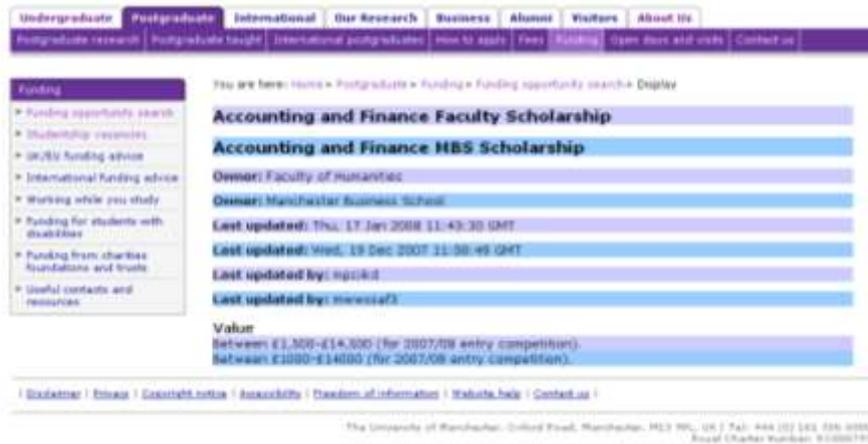

7. Select the **Effective Date** for the previous version you wish to compare with (you can do this via the **look-up**) and then click on the **Compare** button.

8. A webpage will now open up (in a new window) displaying the differences between the two versions, highlighted by different coloured blocks – purple for the latest version and blue for the earlier version.

9. Only sections that have differences between the two compared versions will be displayed (**this is not a preview of the final web page**). In this example we can see that we have differences between the *Funding Source Title*; Owner; *Date Updated*; *User*; and the *Value* of the funding source.

10. Once you have finished viewing this page, you can **close this window**. You will then be returned to the Compare Funding Sources page within Campus Solutions where you need to click on the **Return** button to be taken back to the main Funding Sources page.
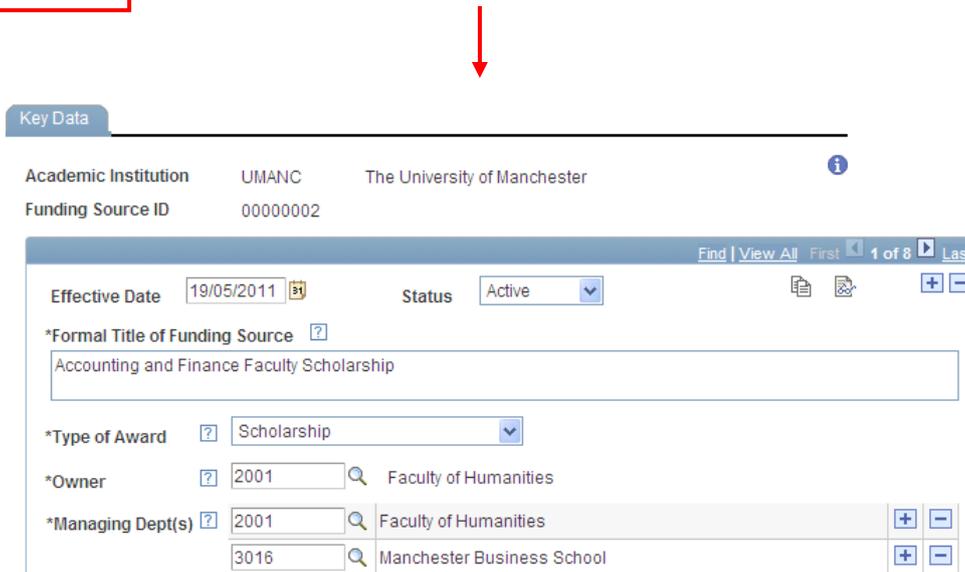
Previewing Data

There is a facility to enable you to preview your Funding Source information, as it would appear on the final published webpage. You can do this at any point after you have made changes to the record, to verify that you are happy with it.

(i) **NOTE:** *It is advised that you always preview the webpage after making any changes.*

4. Click on the **Preview** icon (resembling a sheet of paper with a pair of glasses), located just underneath the Navigation Bar.

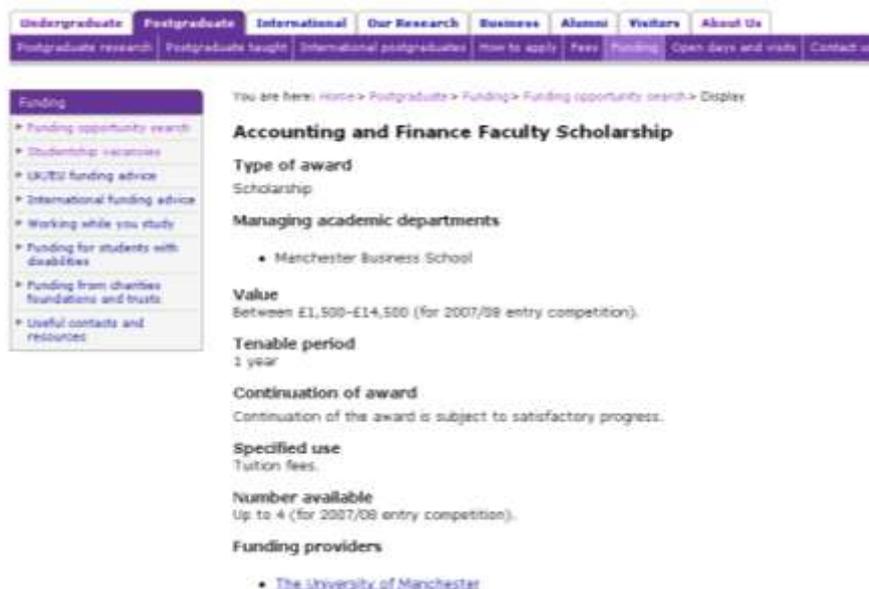5. A webpage will now open up (in a new window) displaying the Funding Source information, as it would appear on the final published webpage.

6. Once you have finished viewing this page, you can **close this window**.

Making a Funding Source Inactive

Before you inactivate a particular funding source, you should always check to see if it is being referenced by a set of Publishing Plan data. You do not want to inactivate a funding source if it is linked to a specific plan, as this will then lead to broken web links.

1. Call up the publishing plan, as detailed on page 6.

2. Click on the **blue Information icon** – this will the display a page showing if this particular funding source is currently being referenced by a set of Publishing Plan data. If it is, then you will need to make a note of the Academic Plan(s) listed, as these will need to be amended before the Funding Source can be made inactive. Click on the **Return** button to exit this page.

ⓘ **NOTE:** If you need to amend some Publishing Plan records and have access to the Publishing Plans module, click on the New Window hyperlink at the top-right of the screen. Navigate to the Marketing Information screen; call up the relevant Publishing Plan record; create a new Draft and amend the 'Sources of Funding' field accordingly; Approve and Publish the updated record; repeat as required for additional Plans.

ⓘ **NOTE:** If you need to amend some Publishing Plan records and do not have access to the Publishing Plans module, contact your relevant administrator.

3. Back on the Funding Sources page, click on the **little plus sign** to insert a new Effective Dated row.

4. On this new Effective Dated row, change the **Status** to be 'Inactive' from the drop-down list. If the system detects any linked Publishing Plan records it will display a warning message – see Step 2 on the previous page.

5. Scroll down to the bottom of the page and click on the **Save** button.

Publishing

Automatic

There is an automatic publishing facility built within the Funding Sources module. The system automatically detects any updates that have been made and then proceeds to pick these up and publish them to the University website.

- This happens **Monday – Friday at 6.00pm**.

This means that after editing and saving a set of Funding Source information you need do nothing else.

Manual

Should you have an urgent update that needs to go live immediately and cannot wait until 6.00pm, you can manually publish your updated information to the website.

ⓘ   **NOTE:** *There may be cases where the changes you have made to a set of data require the re-creation of 'indexes' on the University website (namely when you create a new Funding Source or make an existing one 'Inactive'). In these scenarios your data would not appear on the website until the main system update at 6.00pm, regardless of whether or not you publish the record manually.*

Navigate To: Student Recruiting > Funding Sources > Process > Bulk Publish.

5. Click across to the **Add a New Value** tab and enter a **Run Control ID**. This is simply an identifier for your process. Click on the **Add** button. (If you have created a Run Control ID here previously you can re-use this one as opposed to creating another, by searching for it under the 'Find an Existing Value' tab).

Funding Sources Bulk Publish

Find an Existing Value | Add a New Value

Run Control ID: MBS_PUBLISH

Add
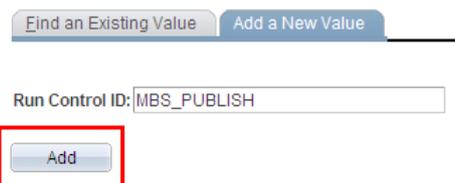
6. On the resulting screen you will need to enter the **Academic Organization** that owns the Funding Sources you wish to publish. You can use the **look-up** to do this. You will then need to select the **Funding Sources to Publish** – there are two options in the drop-down list:

     a. **Updated Funding Sources Only** – This will publish all updated Funding Sources (since 6.00pm the previous evening) only.
     b. **All Funding Sources** – This will publish all active Funding Sources within the specified Organization, regardless of whether or not they have been updated recently.

Bulk Publish

Run Control ID: MBS_PUBLISH   Report Manager   Process Monitor   Run

Search Criteria

*Academic Institution   UMANC 🔍   The University of Manchester
*Academic Organization   2001   🔍   Faculty of Humanities
*Funding Sources to Publish   Updated Funding Sources Only ▾

Search   Reset
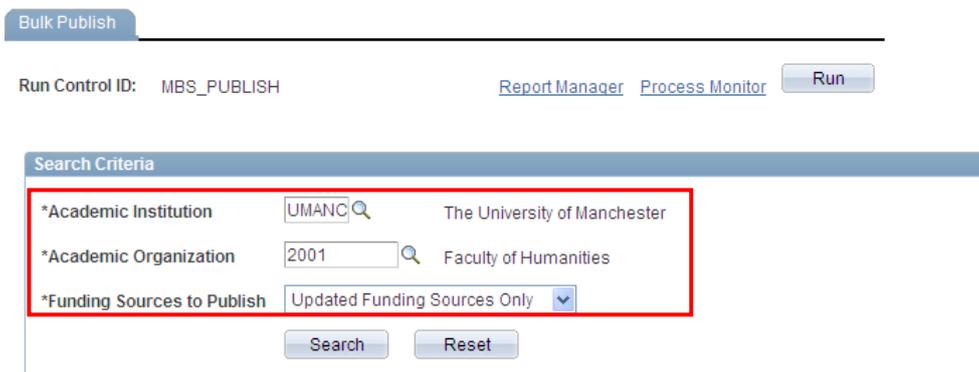
7. Once you have those options entered, click on the **Search** button to list all Funding Source records matching that criteria. **Tick** the record(s) that you wish to publish and click on the **Run** button.

8. You will now be taken to the Process Scheduler Request page where you should see the task 'Publish Funding Sources' listed and ticked. Click on the **OK** button to confirm.

9. You will be taken back to the Bulk Publish page where you now need to click on the **Process Monitor** hyperlink at the top of the page.

10. This will then open up the Process List and your **User ID** should default in (enter it if not). Click on the **Refresh** button until you see the task listed with a **Run Status** of 'Success' and a **Distribution Status** of 'Posted'.

ⓘ   *NOTE: As soon as the Run Status is set to 'Success', the publishing task has completed. We should verify this however by checking the Funding Sources Publishing Report.*

11. Click on the **Details** link at the far-right of the task.

12. On this page, click on the **View Log/Trace** link in the bottom-right corner, and then on the resulting **Report_xxxxxx.txt** link.

13. This will then open up the **Funding Sources Publishing Report** (as a pdf file) in a new window. You can verify here that the task has completed successfully.

```
***************************************************************
* * *              RUN CONTROL PARAMETERS              * * *
***************************************************************

-----                Running in Bulk mode              -----

Publishing All Active Funding Sources (limited to those selected by user)

Institution:  UMANC
Academic Org: 2001



***************************************************************
* * *                    REPORT BODY                   * * *
***************************************************************

The following funding sources were published
-------------------------------------------------------
NO FUNDING SOURCES WERE PUBLISHED



***************************************************************
* * *      END FUNDING SOURCES PUBLISHING REPORT       * * *
***************************************************************

00000006 - Art Gallery and Museum Studies Gallery Updated
```

Creating a New Funding Source

Navigate To: Student Recruiting > Funding Sources > Funding Information.

1. Click across to the **Add a New Value** tab. You will see that the **Academic Institution** defaults in for you and that the **ID** field is greyed-out and set to be 'NEXT'. This means that the system will automatically assign the next available ID to your new Funding Source. Click on the **Add** button.

Funding Information

Find an Existing Value | Add a New Value

Academic Institution: UMANC
Funding Source ID: NEXT

Add

2. Proceed now to populate the fields across the various tabs with your new funding source data. Note that you DO NOT need to add a new row here, as the record is already **Effective Dated**. Note also that the ID is still set to be 'NEXT', as this will not assign until you save the data.

Key Data

| Academic Institution | UMANC | The University of Manchester |
| Funding Source ID | NEXT | |

Find | View All First 1 of 1 Last

Effective Date 19/05/2011   Status Active

*Formal Title of Funding Source

*Type of Award

*Owner

*Managing Dept(s)

*Value

*Tenable Period

3. Click on the **Save** button at the foot of the page to complete.

Save | Notify   Add | Update/Display | Include History | Correct History

4. If you attempt to save the record whilst there is still some mandatory data left unpopulated, then a **warning message** will display on screen asking you to go back and correct it.

5. When you click on the Save button and the system verifies that all mandatory fields are populated, then the Funding Source ID will be assigned.

Further Information & Final Pointers

As we have now come to the end of the training session, here are a few final points to note about the Funding Sources module in Campus Solutions:

2. As this is a new module in Campus Solutions, **a number of existing funding sources have been made inactive**, as they haven't been updated in a while. Therefore before creating a new funding source you should check through your existing entries – it may be that the funding source you require already exists and simply needs to be updated and made active again.

3. You can only update the Funding Source information for your own school.

4. Changes made are **Effective Dated**, and so multiple changes to the same record cannot be made on any one day.

5. The **Owner** field on the Funding Sources page relates to the faculty/school that is responsible for managing/updating that set of Funding Sources data. There can only be one value entered here - there is no shared ownership of the data. This field is not displayed on the final published webpage.

6. The **Managing Dept(s)** field related to the faculties/schools that deal with these particular funding source applications and handle the awards. Multiple values can be selected here and this information is included on the final published webpage.

7. The **International Eligibility** field allows you to select one or more international options that are eligible for the award. The international options are hyperlinked, allowing you to view a list of countries under each title. If you select options within this field, then the Nationality Restrictions field will no longer be available to you.

8. The **Nationality Restrictions** field allows you to select one or more individual countries to which the award is eligible to. If you select options within this field, then the International Eligibility field will no longer be available to you.

9. The **Project Summary** field is only used to enter details of a project-specific studentship.

10. You can use the **Information Icon** at any time to check if a Funding Source is linked to any Academic Plans.

11. **When specifying URLs within fields** (such as in the 'Other Links' section of the 'Contacts' tab) you need to ensure that you specify the http:// at the start of the address. If the system cannot detect this, a warning message will be displayed.

12. **Requesting Access** - To request access to the Funding Sources module, please complete the online BAS Access Request form, available via the following link:

    http://remedy.manchester.ac.uk/cgi-bin/BASUserAccess/controlpanel.cgi

Reference Glossary

Accessing Documentation

All of the Campus Solutions Training Guides and Reference Materials can be downloaded from the IT Services Training Team website at:

www.itservices.manchester.ac.uk/trainingcourses/coursesforstaff

   ⓘ   **NOTE:** *Reference Glossaries no longer contain details of functions such as User Defaults; Adding a Row; or explanations of widely used system terminology. For details of these basic functions please refer to the* **Campus Solutions Introduction**.