

COURSE AND UNIT MANAGEMENT SYSTEM (CUOS)

BASIC NAVIGATION

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1. About this Handbook

All the tabs and screens in CUOS use the same basic navigation, this handbook covers the following functions:

- Searching
- Customising the View
- Using the scroll tool
- Adding New / Updating Information
- Save and Undo Edits
- Deleting Information
- Export to Excel
- Audit
- Reports

1.1 Background

The Course and Unit Offering System (CUOS) is the primary data collection point and repository for Course Offerings, Unit Offerings, Timetable Actuals, Timetable Requests, Exams, Blackboard and the Unit Teaching Evaluation Instrument (UTEI). It also includes a number of reports and administrative tools to aid ECU business processes.

CUOS integrates with a number of other systems such as CMIS (timetable system), UTEI and Blackboard and CAPS. CUOS is an extension of Callista, the same information is visible on Callista and CUOS.

1.2 Data Collection Periods

Each area has its own definable data collection periods. These are set up and maintained in Callista after consultation between the relevant business area and Business Support.

The status of data collection periods and their opening and closing dates can be viewed at any time by clicking on the Home tab in CUOS. This information can also be printed out in a system report.

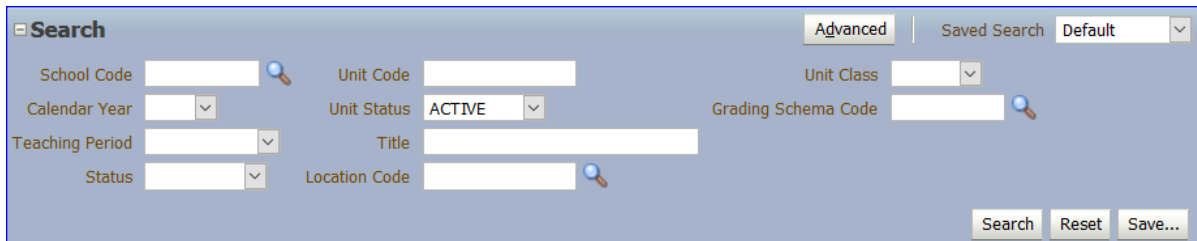
1.3 Rollovers

Data is typically rolled over from one year to the next. The assumption being that the majority of data will apply one year to the next and schools will then only need to maintain the data by exception.

All rollovers are done by Business Support with the exception of timetable requests, which is done by the Schools.

2. Searching

At the top of each tab there is a Search section. Search criteria can be saved and / or set as a default to alleviate the need to repeatedly enter the same criteria for common searches.



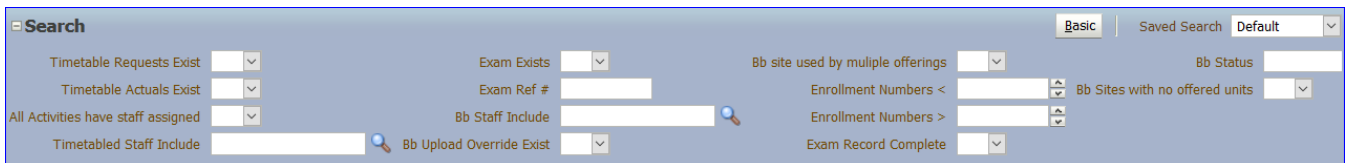
The screenshot shows the 'Search' section in the 'Basic' tab. It features a search bar with a magnifying glass icon. Below the search bar are several input fields: 'School Code', 'Unit Code', 'Unit Class', 'Calendar Year', 'Unit Status' (set to 'ACTIVE'), 'Grading Schema Code', 'Teaching Period', 'Title', 'Status', and 'Location Code'. At the bottom right, there are three buttons: 'Search', 'Reset', and 'Save...'. The 'Advanced' tab is also visible at the top right.

2.1 Basic Search

- Enter the search criteria;
- Click the Search button or press Enter on the keyboard;
- Enter further search criteria to narrow down results or click the Reset button to clear all data from the search criteria.

2.2 Advanced Search

Extra search criteria is available by clicking the Advanced button. The Basic / Advanced button is a toggle that will switch between screens.

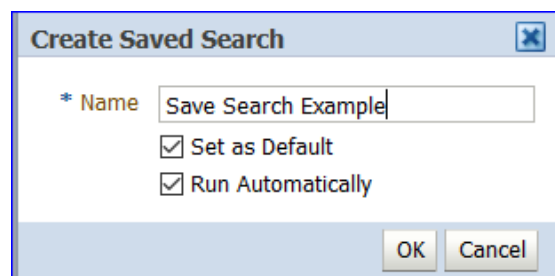


The screenshot shows the 'Search' section in the 'Advanced' tab. It features a search bar with a magnifying glass icon. Below the search bar are several input fields: 'Timetable Requests Exist', 'Timetable Actuals Exist', 'All Activities have staff assigned', 'Timetabled Staff Include', 'Exam Exists', 'Exam Ref #', 'Bb Staff Include', 'Bb Upload Override Exist', 'Bb site used by multiple offerings', 'Enrollment Numbers <', 'Enrollment Numbers >', 'Exam Record Complete', 'Bb Status', and 'Bb Sites with no offered units'. At the bottom right, there are three buttons: 'Basic', 'Saved Search', and 'Default'. The 'Basic' tab is also visible at the top right.

- Click on the Advanced button.
- Enter the required search criteria.
- Click the Search button or press Enter on the keyboard.
- Click the Basic button to return to the standard search criteria.

2.3 Saving Searches

By clicking "Save ..." searches can be saved and / or set as a default to alleviate the need to repeatedly enter the same criteria for common searches.



The screenshot shows the 'Create Saved Search' dialog box. It has a title bar with a close button. Inside, there is a text input field for the name, which contains 'Save Search Example'. Below the name field are two checkboxes: 'Set as Default' and 'Run Automatically', both of which are checked. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

- Enter the required search criteria and click the “Save ...” button.
- Enter a name for the search.
- Check boxes:
 - Set As Default – will make the search the default i.e. when the tab is first opened the search criteria will be filled in automatically and can be activated by clicking the Search button.
 - Run Automatically – will fill in the search criteria and run the search, instead of having to press the “Search” button.
- Click OK. This will save the search. The search can then be selected at any time from the Saved Search drop down list.

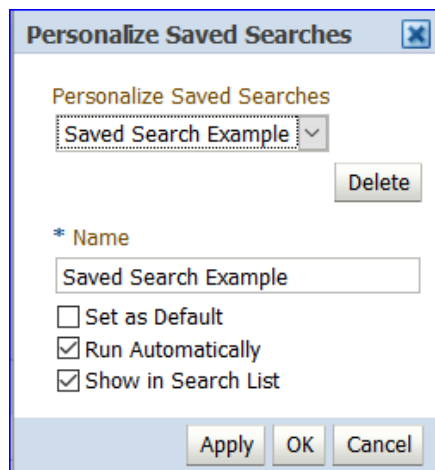
The Saved Search drop down list has a number of options:

- Able to select Saved Searches using the name entered.
- Able to select Default, if a saved search hasn’t been set to default, it will blank out all the search criteria same as the reset button.
- Able to select Personalise, this will pop up a window that allows access to all saved searches so you can delete or edit them.

2.4 Deleting a Saved Search

A saved search can only be deleted when it is not in use.

- Select another saved search or Default from the drop down list.
- In the Saved Search drop down menu select “Personalise”
- Select the Saved Search name to be deleted
- Press Delete, then OK.

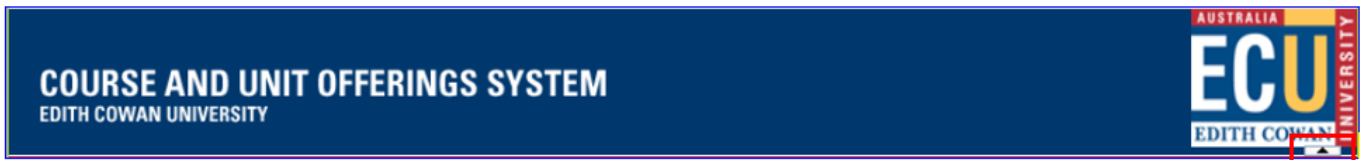


3. Customising the View

3.1 Hiding the Banner

The ECU banner appears at the top of every screen in CUOS. This banner can be hidden to allow more screen space.

- To hide click the small arrow under the ECU logo.
- To show the arrow again to display the banner.



3.2 Hiding the Search Screen.

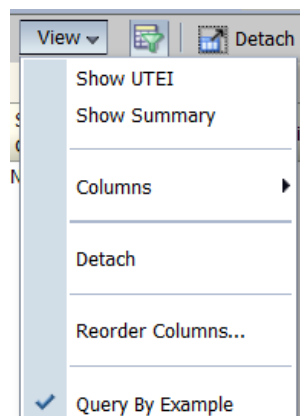
The Search screen can be hidden to obtain more screen space.

- To hide click the minus button next to the word “Search”.
- To show click the plus button next to the word “Search”



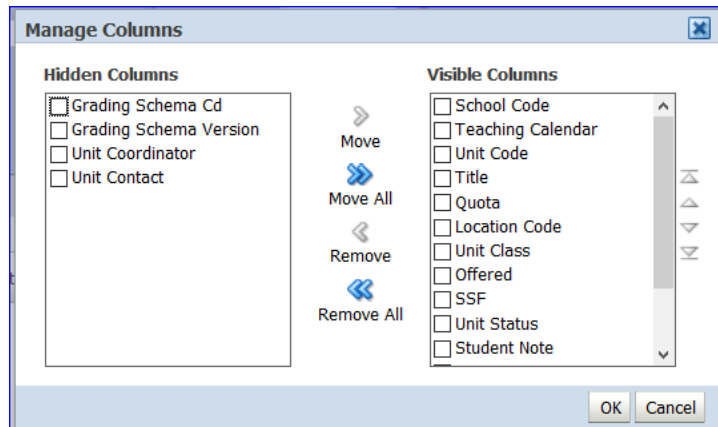
3.2 Using the View Menu

The View Menu is found on the left side, directly above the detail section. In all cases there will be a Columns and a Reorder Columns option, in some cases there will be the option to show or hide certain information.



3.3 Adding / Removing / Reordering Columns

- Click on the View button.
- Click on Columns | Manage Columns
- Add and remove columns as required by checking the box and clicking Move / Remove arrows.
- Reorder the columns by checking the box and clicking the up / down arrows.



3.4 Resizing Columns

Click the column border in the heading section and drag the columns to resize. Note the adjoining column will also resize in relation to action taken.

School Code	Teaching Calendar	Unit Code	Title
34	2020/SEMESTER 1	UPU0005	Science
34	2020/SEMESTER 1	UPU0001	Learning Skills
34	2020/SEMESTER 1	UPU0006	Essential Mathematics
34	2020/SEMESTER 1	UPU0004	Humanities
34	2020/SEMESTER 1	UPU0002	Academic Writing

3.5 Sorting

Up and down arrow will appear when the cursor is placed in the column heading. Clicking the arrows sorts the data in ascending or descending order.

School Code	Teaching Calendar	Unit Code	Title
34	2020/SEMESTER 1	UPU0005	Science
34	2020/SEMESTER 1	UPU0001	Learning Skills
34	2020/SEMESTER 1	UPU0006	Essential Mathematics
34	2020/SEMESTER 1	UPU0004	Humanities
34	2020/SEMESTER 1	UPU0002	Academic Writing

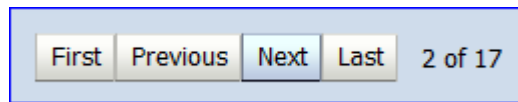
3.6 Detach (Making the Information Area Larger)

Click the Detach button to maximize the detail area. Click the "X" to return to normal view.



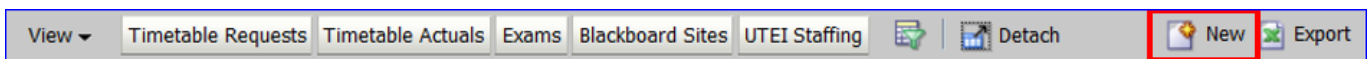
4. Using the Scroll Tool

Once the search results have been returned and sorted as required, it is possible to scroll through the data without having to go back to the Units screen. The scroll tool is found in the Timetable Requests, Timetable Actuals, Exams Blackboard and UTEI screens.



5. Adding New / Updating Information

Where it is possible to add information in the system, the New button icon will be visible as per below.

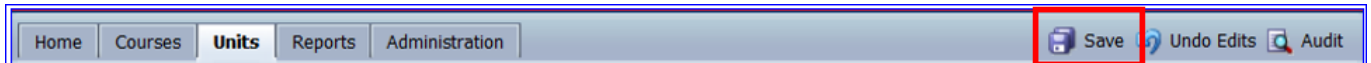


- Click the New button.
- Enter the details as required.
- Click Create or Save or Apply (depending on the screen).
- Click Save to complete the process.

6. Save & Undo Edits

6.1 Save

The Save button is located at the top right of the screen. Click Save to save all changes.

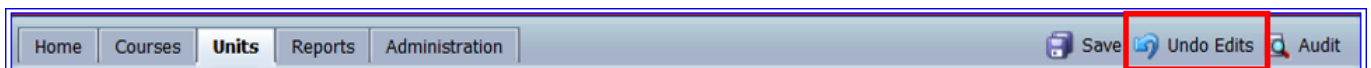


6.2 Undo Edits

The Undo Edits button is located at the top right of the screen. At any point up until Save is clicked any changes made (although they appear on the screen) can be undone and reverted back to the original values by clicking on the Undo Edits button.

Note:

- Undo Edits will undo all changes made since the last save, it does not undo changes one by one.
- If navigation away from the current tab is attempted a message will prompt to either Save or Undo Edits before continuing.



7. Deleting Information

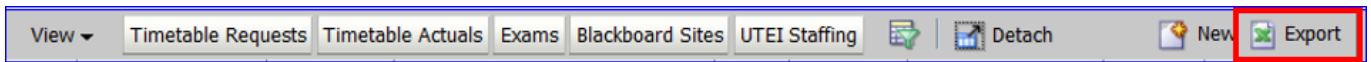
Where it is possible to delete information in the system the Delete button icon will be visible.



- Select the row to be deleted and click the Delete button.
- Click Save.

8. Export to Excel

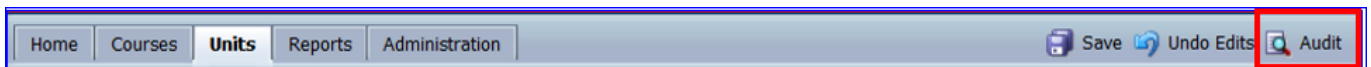
Where it is possible to export the current view to an Excel spreadsheet, the Export button will be visible as per below. Click the Export button and follow the excel prompts by selecting "OK" and "Yes".



9. Audit

Located on the top right of the screen, click Audit to retrieve a list of all activity that has occurred to the highlighted record.

- Highlight record in CUOS
- Click Audit
- Report will open as a PDF in a separate screen.



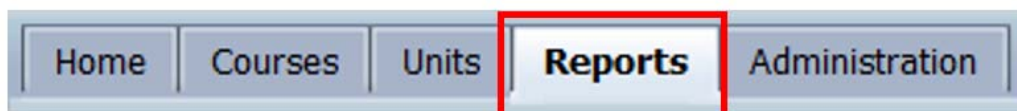
Note:

The Audit report opens in a PDF that your internet browser may have blocked as a "pop-up". If this happens either click "Allow pop-ups for" Or "Show..."



10. Reports

Click on the reports tab to show a list of reports. All reports work on the same basic principle of choosing the parameters and Clicking Apply. All reports open in Excel.



11. Troubleshooting

Area	Problem	Solution
Search	Search results do not appear.	<p>Check there isn't any search criteria in the Advanced screen.</p> <p>Change the Unit Status to Blank.</p>
Saved Searches	Saved Search won't delete	<p>Make sure the saved search to be deleted isn't active. Choose another saved search, or choose "default". Then delete the saved search.</p>
Columns	Column isn't displaying	<p>Check if a scroll bar is showing on the screen, could require scrolling to see it.</p> <p>Check column size, it may have been resized too small.</p> <p>Check Manage Columns to see if it is in the list of visible columns. If not, move it to the list.</p>
Export to Excel	Data not exporting to Excel.	<p>Check the Excel message boxes aren't hiding behind other windows.</p>
Audit	Audit data isn't displaying	<p>The Audit report opens in a PDF that your internet browser may have blocked as a "pop-up". If this happens either click "Allow pop-ups for" Or "Show..."</p>