



Curriculog™ End User Manual

Revision date: [07/2020]



CURRICULOG

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About Curriculog

Congratulations on your institution's purchase of the Curriculog Curriculum Management System!

Curriculog is the culmination of years of research with input directly from our customers on what they need in a curriculum management solution. It integrates with student information and degree audit systems, streamlines curriculum approval processes, and makes approved courses and programs available for catalog publishing.

Curriculog comes equipped with an easy to search online help and community. The contents of this manual are available within the online help through Curriculog University, though this manual compiles it into a single document for easy reading.

Note: *The online manual will always be the most up to date; but the revision date will always be included on the cover page of this manual. This version, 12, was revised July 2020.*

CONVENTIONS USED IN THIS MANUAL

We have attempted to make this manual as easy to read and navigate as possible for the end users. To that end, a few basic conventions will be used throughout – and administrative functions will not be covered.

Because all web browsers render web pages differently and some features may differ in your installation of Curriculog, the screenshots used in this manual may differ slightly from what is displayed in your web browser. These images are intended for reference only.

Each of this manual's sections may contain several sub-sections, which, in turn, may have their own sub-sections and so on. Using the CTRL + F (PC) or CMD + F (Mac) feature can help you locate certain keywords very quickly, or you may select an option from the table of contents to jump to that section of information.

Throughout this manual, there are two types of users that will be referenced. 'Users', which will refer to the end User, who will manage proposals, agendas, and leave comments throughout the system. 'Administrators' will refer to users who also have System Administrator access, allowing them to manage the setup of the system. This manual will cover the User's access only.

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Guests

A Guest within Curriculog is anyone who visits the system but does not log in. Guests are unable to make any changes to content, provide comments, or modify proposals.

Guests to the system can potentially enter and view active proposals at any time, based on transparency settings established by the administrator. Guest access for comments may be restricted by step, by proposal, or restricted entirely from the system. When accessing Curriculog as a guest, you may have access to view a summary of a proposal, the full proposal itself, agendas and/or reports.

The screenshot shows the Curriculog interface for guests. At the top, there's a navigation bar with 'Proposals' selected. Below it, a 'Proposals' tab is highlighted. A 'Filter by:' dropdown is set to 'All Proposals'. On the right side, there's a sidebar with the Curriculog logo and a brief description: 'Curriculog - Curriculum Management System. Curriculog automates the process of curriculum approval, helping colleges and universities to approve course and program changes and improve communication about the curriculum across campus.' Below the sidebar, under 'Accessing the System', it says: 'Right now, you are a guest, and can view all change proposals in the list to the left. By clicking on the View icon, you can see the proposal's progress. If you are a member of the process and need credentials to log in, please contact a system administrator.'

Proposal Title	Description	Last Activity
ACCT - 100 - Accounting	1. 2020-2021 New Course	Aug 10, 2020 10:52 AM by Mara Sansolo
ACCT - 100 - Accounting	1. 2020-2021 New Course	Aug 10, 2020 10:52 AM by Mara Sansolo
ACCT - 221 - Principles of Accounting I	Course Modification Form	Feb 20, 2020 8:01 AM by Vicky Kulg
ACCT - 221 - Principles of Accounting I	2019-2020 Course Revision Form (AM)	Mar 2, 2020 4:05 PM by Michael Patterson
ACCT - 321 - Art	1. 2020-2021 New Course	Jul 15, 2020 2:02 PM by Diana Prince

Log In

To act upon proposals, leave comments, or provide decisions - you **must** have a user account and login. The login page is available to anyone who accesses the Curriculog website. To login, navigate to the upper right corner of the screen and select "Login".

The screenshot shows the Curriculog login page. It has a title 'Welcome to Curriculog' and a message 'Please login to view your personal dashboard.' Below that are two input fields: 'Login:' and 'Password:', each with a corresponding placeholder. At the bottom are two buttons: 'Login' and 'Cancel'.

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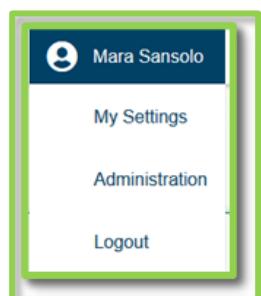
Users

MY DASHBOARD

Once you have logged into Curriculog, the first screen you will see is “My Dashboard.” This dashboard will serve as your gateway to Curriculog and allow you to manage your proposals and see recent notifications and upcoming events at a glance.

Date	Notification
Jul 20	Completed: The proposal, ACCT - 321 - Intermediate Accounting 1, with the step of Originator has been approved and is now completed. Click here to view the proposal.
Jul 20	Approved: The proposal, ACCT - 321 - intermediate Accounting 1, with the step of Originator has been approved and is moving on to the No More Steps - Proposal is completed step. Click here to view the proposal.
Jul 18	Urgent: Your proposal, Pre-KPrimary Education, B.A., is now urgent. It has been on your tasklist for 9 days without activity. At your earliest convenience, click here to review this proposal and complete your task.
Jul 8	Next Step: The proposal, Pre-KPrimary Education, B.A., is moving on to the next step and has become your new task. Click here to view the proposal in Curriculog and complete your task.
Jul 8	Approved: The proposal, Pre-KPrimary Education, B.A., with the step of Originator has been approved and is moving on to the Department Chair step. Click here to view the proposal.

Once you have logged in, you will find several items within your dashboard. Across the top of the page you will find a persistent toolbar, from which you may access the Proposals, Agendas, Accounts, and Reports Modules.



In the upper right corner, there are options for your own user account listed below the drop-down menu, giving you options for My Settings (selecting My Settings will redirect you to the Accounts Module from the top menu), Administration (only available if you are also an administrator) and Logout.

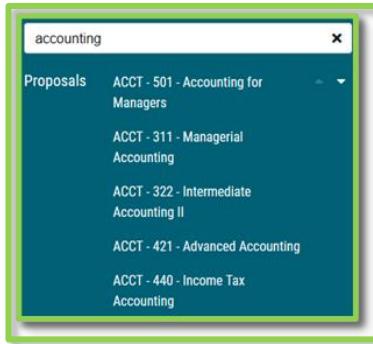
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Following your name are “Help” and “Search” icons. If you select “Help,” a window featuring symbols and colors utilized in Curriculog will display.



Curriculog Help

Listed below are the symbols and colors utilized in Curriculog:

	= has not made a decision		= task
	= approved		= mine
	= rejected		= stuck
	= held		= urgent, out of date import source
	= suspended		
	= cancelled		
	= multiple decisions		

Ok

The search function may be used to locate proposals based on their titles or users throughout the system.

Note: For more effective searching, we recommend using the Advanced Filter within the All Proposals tab.

The right pane will display My Recent Notifications and My Upcoming Events. The left pane will update based on the tab selected.

If tasks are waiting to be completed, or if any of those tasks are marked as urgent, clickable links will appear just under the My Dashboard header. Selecting either the number following Tasks or Urgent will display the My Tasks tab in the left pane.

My Recent Notifications

You will receive notifications for a variety of reasons, such as a proposal receiving a decision, an edit being made, or a comment being provided. Notifications will be e-mailed to you based on your e-mail settings – some users choose to receive an e-mail notification as soon as the event occurs, while others choose to compile them into a digest to limit the number of e-mails received. In some cases, the Administrator may choose the e-mail settings on your behalf.

The My Recent Notifications section of the Dashboard will show you the five most recent notifications. If additional actions are required, there may be a link provided within that notification. To scroll through more options, select the arrow in the upper right corner to scroll through them.

My Recent Notifications

Jun 9 **Urgent:** Your proposal, Biological Sciences B.A., is now urgent. It has been on your tasklist for 40 days without activity. At your earliest convenience, [click here](#) to review this proposal and complete your task.

Jun 9 **Urgent:** Your proposal, ECE - 366 - Learning Environments, is now urgent. It has been on your tasklist for 90 days without activity. At your earliest convenience, [click here](#) to review this proposal and complete your task.



My Upcoming Events

My Upcoming Events will list the next five upcoming items. Events may include deadlines within your proposals, or events that the administrator has placed on the calendar. Events relating to your deadlines will be visible to you only; events placed by administrators will be visible to all users. To view the full calendar, select the calendar icon in the upper right corner.

Note: Only an administrator can add events to the calendar.

A screenshot of a web interface titled "My Upcoming Events". The title is at the top left, and there is a small calendar icon at the top right. Below the title, three event items are listed in a table format. Each item has a date, an event name, and a "Show More" link. The events are: "26 Jun Curriculum Meeting", "17 Jul Curriculum Deadline", and "14 Aug Curriculum Deadline".

My Upcoming Events	
26 Jun	Curriculum Meeting Show More
17 Jul	Curriculum Deadline Show More
14 Aug	Curriculum Deadline Show More

Selecting one of the upcoming events will expand and show additional details.

The calendar included within Curriculog is built to manage deadlines and track timeframes within the system. It will not export or import information, and it will not sync with any external calendar application.

PROPOSALS

A proposal is a form that follows a workflow to receive an approval and is tied to an approval process in a 1:1 relationship. Proposals may be used to create or make changes to courses or programs. Administrators will create an Approval Process, which you will select to act as the template to base your proposal on. Selecting the Proposals Module from the top navigational menu will populate the left pane with options relevant to managing proposals.

From the Proposal Module in the top navigation, you will now have access to the My Tasks, My Proposals, Watch List, and All Proposals tabs.

A screenshot of a web interface showing four tabs: "My Tasks", "My Proposals", "Watch List", and "All Proposals". The "My Tasks" tab is highlighted with a blue background and orange circle icon. The other tabs have a grey background and green circle icons.

- My Tasks
- My Proposals
- Watch List
- All Proposals



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- **My Tasks** - lists all proposals in which you are an active participant and awaiting action from you.
- **My Proposals** - lists all proposals you have created, whether they have been launched or not.
- **Watch List** - lists all proposals you have selected to watch. You may or may not have editing permissions or decision-making abilities on an item you are watching, as you can watch any proposal in progress. You may choose to stop watching a proposal at any time.
- **All Proposals** - lists all proposals in Curriculog and provides the Advanced Filter.

Below these tabs is the New Proposal link. Selecting New Proposal will open the workflow to create a new proposal.

There are various icons and colors associated with the proposals.

The thin colored bar that appears to the left of the proposal will change based on the relationship with the user.

- **Blue** - No action currently required as you are not an active participant on this proposal on the current step.
- **Green** – You are the originator of this proposal, but you are not an active participant on the current step and no action is currently required.
- **Orange** – You are an active participant on the current step and an action is required from you.

There are numerous other icons that may be associated with proposals as well, which will be outlined below.

Urgent - Indicates a task is now considered "Urgent". An item will be considered urgent once the urgency threshold has been met, which is set by an administrator. After the indicated number of days has passed, a notification will be triggered to prompt you to make a decision on the proposal. When an item is considered "Urgent," it will be marked in your task list by this orange icon. Unlike a deadline, the urgency threshold does not trigger any automatic actions on a proposal.

View Summary - Will create a flyout on the right pane displaying information relevant to the proposal. The same flyout will appear by clicking anywhere within the proposal's row in addition to the icon. The fields that appear in the Process Fields section will be determined by your administrator.

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✉️ Send message about Proposal – Allows you to send a message to another Curriculog user. The e-mail will be pre-populated with a link to the proposal you were reviewing, and will allow you to include one or more users, as well as a copy to yourself. Curriculog does not store a copy of any e-mail.

⭐ Watch Proposal - Allows you to keep track of a proposal in progress by listing under the Watch List tab, even if you are not a participant on any step.

⭐ Done Watching Proposal - Allows you to stop tracking the proposal and removes it from your Watch List.

➊ My current decision - This icon will change based on what decision you have made on the proposal. The empty circle shown to the left indicates that no decision has been entered. The additional decision options are as follows:

👉 Approved – This indicates that your decision was to approve the current step. If you were the only decision needed on this step, it would advance in the workflow. If there are others involved on this step, it will wait until all needed decisions are received before advancing.

👎 Rejected – This indicates that your decision was to reject the current step. If you were the only decision on this step, the step will follow the rejection route laid out by the administrator: either it will return to the previous step, or it will return to the originator for further revisions. If there are others involved on this step, it will wait until all needed decisions are received before proceeding along the rejection route.

➡️ Held – This indicates that your decision was to request that the administrator place the proposal on hold, and the administrator has approved it. Now that the proposal is on a status of “hold”, you may continue to work on the proposal without worry that the deadline will automatically advance it to the next step. The proposal will stay on hold until the administrator manually lifts the hold status.

🔴 Suspended – This indicates that your decision was to request that the administrator place the proposal on suspend, and the administrator has approved it. Now that the proposal is on a status of “suspend”, the proposal will be removed from the workflow and nobody will be able to work on it. The proposal will stay on suspend until the administrator manually lifts the suspended status.

🚫 Cancelled – This indicates that your decision was to request that the administrator allow you to cancel the proposal and potentially delete it. This may be due to a proposal being created in error – such as the incorrect approval process being selected. Once the administrator has approved it, you may choose to delete the proposal. This is the only way you can delete a proposal after it has been launched.

🌐 Multiple Decisions – This icon is used to indicate that you have multiple decisions on this step – such as when a step has several committees voting on it, and you are a member of more than one of those committees, therefore providing multiple decisions.

ⓧ Delete a Proposal - Deleting a proposal will permanently remove it from Curriculog and should be considered a permanent action that cannot be undone. Proposals cannot be deleted after they have been launched unless they have been canceled by an administrator. The delete icon is always available for unlaunched proposals. If the

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proposal has been launched, you may be able to cancel it by selecting it as a decision if the administrator has provided it as an option - or by contacting your administrator.

⌚ **Step Restart** – This symbol indicates that a step was restarted. A restart commonly occurs when the users involved in the step are replaced with another user.

Editing a Proposal

Proposals awaiting a decision from you will be listed in the My Tasks tab of the Proposals Module. This tab will display by default when logging into Curriculog.



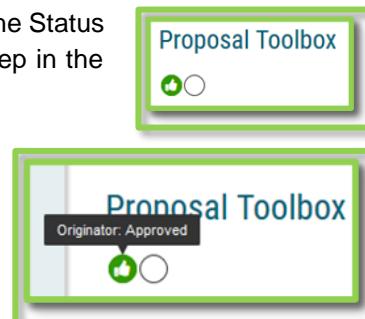
When you hover over a proposal, several icons will appear giving you options for interacting with the Proposal. Descriptions of each icon can be found above.

To make a decision or interact with the proposal, click the name of the proposal. The proposal form will display allowing you to see the full proposal on the left and Proposal Toolbox on the right. The default view for the Proposal Toolbox will be the Discussion tab 🗣, where you will see the User Tracking and any comments.

The screenshot shows a proposal for 'ART - 212 - Color Theory and Design'. The left side displays general catalog information, including the prefix 'ART' and code '212'. The right side features the 'Proposal Toolbox' with the 'Discussion' tab active. The toolbox includes sections for 'User Tracking' and 'Comments'. In the comments section, there are two entries: one from 'Curriculog' and one from 'Mara Sansolo'. Each entry includes a 'Reply' button.

You may view the status of each step within the proposal by hovering over the Status icons in the upper right of the Proposal Toolbox. Each circle indicates a step in the proposal.

Hovering over a circle indicates the name of the step and the decision made on that step.



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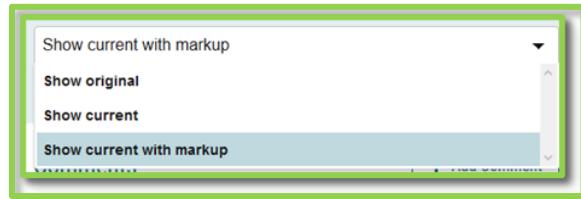


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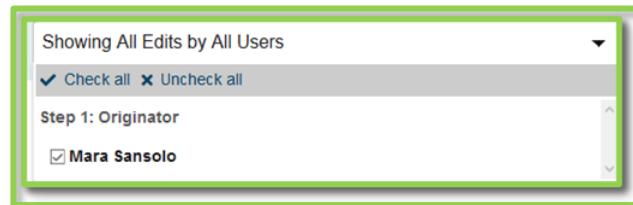
To review changes to the form of the proposal, you can review the User Tracking. The default view will be 'Show Current', which will be the current version of the proposal with all modifications. You can use the drop-down menu just under the "User Tracking" heading, and you'll find the options for "Show original" and "Show current with markup."

If you select "Show Original", you will see the proposal in the state it was at launch as the originator submitted it.

If you select "Show current with Markup", you will see the original proposal with the changes layered over it and highlighted in different colors to indicate each user who made the changes. If you hover over the changes, you'll see a time and date stamp as well as the user's name.



The second drop-down menu allows you to select which users edits you would like to see. The default will be to show all edits by all users – but if you select the menu, you can choose on a step by step basis, to remove a user at any time to see the proposal before and after their edits were added.



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Comments

+ Add Comment

Mara Sansolo
6/23/2020 10:50 am

Comment

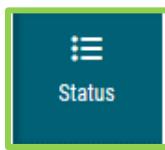
Curriculog
2/24/2020 4:29 pm

Mara Sansolo has approved this proposal on Originator.

Reply

Comments will appear below the user tracking, although your ability to see them will vary based on the transparency set by the administrator. If the permissions on the current step allow for it, you may reply to any existing comments or add new ones using the available links.

Depending upon how a step has been set up, you may edit the proposal, provide comments, or function as an Agenda Administrator.



To review step options and see permission levels, select the Status icon  from the Proposal Toolbox, and click on the  within any step.

In the Rules portion, you will be able to see the settings for each step.

- *Can Edit:* Yes indicates that a user on this step will be able to make modifications.
- *Can Comment:* Yes indicates that a user on this step will be able to leave comments.
- *Signature required:* Yes indicates that a user on this step will be required to provide a signature when they place their decision.
- *Agenda Available:* No indicates that this step will not allow for committee functionality, or for the proposal to be placed on an Agenda at this time.
- *Comments viewable by:* Every user indicates the level of transparency the administrator has set.

Note: Only an administrator can modify these settings.

Knowing what permissions you have on your step will make your work within Curriculog easier. For example, using the step in the screenshot to the right as an example – knowing that an ‘Agenda Available’ is set to no, you won’t be looking to create an Agenda for this step or wonder why there are no committee options available.

Originator Approved

Participants Mara Sansolo | 2/24/2020 4:29 PM

Activity

Required Participation: 100% required
Required for Approval: 100% required
Date Completed: 2/24/2020 4:29 PM
Changes: Yes
Comments: No

Originator

Participants Originator

Step Details

Work: edit, comment
Decisions: approve 100% required
Requests Available: none
Agenda: no
Signature: no
Deadline: none

Committee Review

Participants Committee Review

Step Details

Work: edit, comment
Decisions: approve 100% required
Requests Available: none
Agenda: yes
Signature: no
Deadline: none



Printing Proposals

You may also choose to print your proposal at any time by selecting the Print Friendly icon  from the upper right corner of the form. When you choose to print the proposal, you will be presented with a print friendly version of the form. If you would like to include more details, you can select "Print Options" and use the checkboxes to select the information you would like to include in your printed version.

Which proposal details would you like to include in the printed proposal?

<input type="checkbox"/> Summary Fields Only	<input type="checkbox"/> Crosslisting (Name of the crosslistings)
<input type="checkbox"/> Steps	<input type="checkbox"/> Signatures
<input type="checkbox"/> Files (Name of the file and author)	<input type="checkbox"/> Decision Summary for the Current Step
<input type="checkbox"/> Comments (only the comments you can view)	<input type="checkbox"/> Tracking (printing in color will help the readability)

[Select Options](#) [Print Proposal](#) [Close Options](#)

Proposal Fields

There are several types of fields within a form that will be filled in to house information about your proposal.

If you are entering information into a new proposal - be sure to save your information regularly by using the "Save All Changes"  that appears at the top or bottom  of the page. If you navigate away from the page without saving, the changes will be lost. If you try to leave the page without saving, you will be prompted to save the page.

This page is asking you to confirm that you want to leave - data you have entered may not be saved.

[Leave Page](#) [Stay on Page](#)

When you are ready to launch, fields will be validated to ensure required fields have content. Any required field, which will be indicated by a red asterisk, that is left blank will fail validation – and the proposal will be unable to launch. Fields missing information will be highlighted in yellow, to indicate which ones must be filled in prior to being able to move on to the next step.

If you are making changes to an existing proposal – you will need to save **each** field as you work by click the save button that appears under each field.

Could Not Launch Proposal

Please correct the following errors before launching the proposal.

Proposal has validation errors

[Ok](#) [Show Me](#)

The following types of fields may be found in any proposal.

When Offered

<input type="checkbox"/> Spring
<input type="checkbox"/> Summer
<input type="checkbox"/> Fall

[Save](#) [Cancel](#)

Hierarchy Owner*

Hierarchy

The first item will be the "Hierarchy Owner" field, which designates the owner of the information within Curriculog, and is used to assign the appropriate users to steps. Many institutions choose to rename this field to something more relevant to their needs – such as department, school, or college – but the default title within Curriculog is "Hierarchy Owner". This is a required field within Curriculog that cannot be removed, must be selected prior to launch, and cannot be changed once the proposal has been launched.



By clicking in the field, you will be able to choose an item from the populated list – you can also begin typing in the field to quickly locate options; the dataset available is the entity list from your Hierarchy module. Your administrator may choose to limit this list further by choosing to restrict it by an entity type, allowing you to select only departments, for example.

The primary purpose of the hierarchy is to indicate the user who will be brought onto the step – so if you have selected an entity and there is a step unable to locate a user within that entity – you will be unable to launch the proposal. Your options will be to either choose a different entity from the hierarchy, or to contact an administrator for assistance.

Smartfields

Any time a field presents the option, “Select an option,” you will be able to select an option from an available list, similar to the hierarchy. This type of field is known as a Smartfield, and the options available are designated by your administrator. You will not be able to change the options, and if you do not see the appropriate option available – you will need to contact them for additional information. In addition to using your mouse to select from the list, you can also begin typing to quickly locate an item.

If the administrator allows it, you may choose more than one option. To remove a selected option, click the “x” next to the option’s name.

A screenshot of a dropdown menu titled "Hierarchy Owner". It shows a list of entities: "Academy University" (selected), "Academic Programs and Services", and "College of Arts and Sciences". The entire menu is highlighted with a green border.A screenshot of a proposal step summary. It shows the "Originator" as "Working", the "Step Summary" (which requires 100% approval), the "Participants" (Heather Kelly, 5/26/2020 9:58 AM), and the "Totals" (0 approved, 0 rejected). The entire summary section is highlighted with a green border.A screenshot of a dropdown menu titled "Course Type". It shows a list of course types: "Accounting" (selected), "Agricultural Mechanization", and "Agricultural Science and Technology". The entire menu is highlighted with a green border.A screenshot of a text input field with the placeholder "Course Type" and the value "Accounting". A validation message below the field says "You can only select 1 item". The entire input field area is highlighted with a green border.

Text Fields

Code, displayed here, is an example of a text field. A text field will allow you to input a small amount of text. Information placed here will need to be entered as plain text – no formatting can be applied of any kind. (Nothing in bold or italics; no HTML or JSON) An administrator may apply a maximum character length on the field or apply validation rules such as ensuring it is formatted as an e-mail or phone number – so be sure to check any help text or directions provided within the form.

A screenshot of a text input field with the placeholder "Code*" and a blank text area. The entire input field area is highlighted with a green border.



Text Area

Text areas give you a much larger field to work with and may include a WYSIWYG editor. If the administrator has provided the editor, you will be able to format the text using the tools available within the editor. If you are pasting information into the editor – it is recommended that you paste plain text. As the editor does not contain a native ‘paste as plain text’ option, you can use a tool like ‘Notepad’ (a native tool within most PCs) to paste your content into first, and then paste into the editor to ensure it is entered as plain text.

Note: permalink information brought in from Acalog as part of an import will be available for review but may not be created nor modified within Curriculog.

The screenshot shows a WYSIWYG editor interface with a toolbar at the top containing various formatting options like bold, italic, underline, and alignment. Below the toolbar is a text area containing the text: "ACCT 222 - Intermediate Principles of Accounting and a minimum of 55 sh credit or Acct 501".

Radio Buttons

Some fields will provide you with an either/or type of option, or a yes/no scenario, or a list of options in which you must choose a single answer. These selections are presented using a radio button – indicating you may make only a single selection. The administrator may choose to order the list vertically or horizontally on the page based on their own aesthetic preference, but they will function the same.

The screenshot shows a form field titled "Type of Program*" with two options: "Program" (radio button checked) and "Shared Core" (radio button uncheckable).

Checkboxes

A checkbox is used to allow for multiple selections to be provided. Like a radio button, checkboxes can also be presented either horizontally or vertically on the page depending on the preference of the administrator.

The screenshot shows a form field titled "When Offered" with three options: "Spring", "Summer", and "Fall", each represented by a checkbox.

Learning Objectives (Courses Only)

The Learning Objectives field will be available when your administrator has the Assessments enabled, allowing you to provide objectives that may apply to your proposal. To enter a new objective, select “Add New Item.”

The screenshot shows a modal dialog titled "Learning Objectives" with the message "No Learning Objectives". It contains three buttons: "Add New Item", "Done Editing", and "Cancel".



This will launch the list of available options that the administrator has predetermined for you (similar to a Smartfield) allowing you to select one or more of the options. Each option you select will be indicated with a blue highlight, and when you have made all your selections, click “Done” to add them to your proposal.

If you do not see an appropriate option, and your administrator has enabled the feature – you may also use the “Create New” button and enter a custom objective.

Once an objective has been added to the proposal, it can be removed by clicking the “Remove” button that appears below it.

A screenshot of a modal window titled "Please select from the following:". It contains a large list of learning objectives categorized under "Chemistry Learning Outcomes" and "English Learning Outcomes". Each objective is a link. At the bottom are "Done", "Create New", and "Cancel" buttons.

Expected Outcomes (*Programs Only*)

The Expected Outcomes field will be available when your administrator has the Assessments enabled, allowing you to provide outcomes that may apply to your proposal. The workflow for adding the assessment information will follow the same path as the Learning Objectives above.

A screenshot of a modal window titled "Learning Objectives". It shows a single item: "Chemistry Learning Outcomes" under "Chemistry proficiency". At the bottom are "Save" and "Remove" buttons.

The second feature included with the assessments tool is the program map , available at the top of the proposal near the import icon. After you have added contents to your Prospective Curriculum and Expected Outcomes fields, you can use the program map to determine whether the courses linked in the curriculum will line up with the outcomes that have been provided.

The icon will launch the map in the default view, showing the Simple Matrix.

A screenshot of the Simple Matrix view for "Accounting B.B.A. Shared Core Test - with Assess". The matrix has "Expected Outcomes:" as the first column header. The first row contains "ACCT 221 Principles of Accounting I" and a "Add Assessment for ACCT 221" button. The second row contains "Communication Skills" and "Computer Literacy". There are "Save" and "Remove" buttons at the bottom right of the matrix area.



The courses listed in the curriculum will appear down the left side, with an “Add Assessment” option under each one. Selecting this option will provide the predetermined list of assessment options, allowing you to select the ones that this course may fulfill. Once you have selected the option, it will appear below the course with a checkbox under each of the outcomes assigned within the proposal, where you may indicate where it has been accomplished within this program.

Changing the “Simple Matrix” drop-down menu at the top of the page to the “Skill Matrix” option will change the values under the assigned outcomes from just “Accomplished”, to a range of options from “Introduced” to “Assessed.”

The use of the program map does require manual input; and even when importing information into the program – recall the course details only import course prefix, code and name.

Note: Although the program map does include an icon in the upper right corner for exporting the map to a CSV and for printing, there is currently an issue with these two features. The export icon will currently not deliver the file and provide an error page; and the print version of the file contains a large amount of additional spacing. Our Development Team is working to locate the underlying cause of this issue and a resolution as quickly as possible.

Expected Outcomes:	Communication Skills
ACCT 221 Principles of Accounting I + Add Assessment for ACCT 221	
Computer Literacy Demonstrate knowledge of basic computer technology and tools	<input type="checkbox"/> Accomplished

Expected Outcomes:	Communication Skills
ACCT 221 Principles of Accounting I + Add Assessment for ACCT 221	
Computer Literacy Demonstrate knowledge of basic computer technology and tools	<input type="checkbox"/> Introduced <input type="checkbox"/> Reinforced <input type="checkbox"/> Mastered <input type="checkbox"/> Assessed

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Program Type (*Programs Only*)

The Program Type field is used by Curriculog on program type proposals to determine if the proposal is going to be a program or a shared core – much like how Acalog uses two different tabs to differentiate between the two. In some cases, your administrator may choose to disable this field and not require a selection. In others, they may have renamed it – the most common renaming is ‘type of program’ – and it must be selected prior to being able to import program information.

Type of Program*
<input checked="" type="radio"/> Program
<input type="radio"/> Shared Core

Shared Cores will follow the same rules within Curriculog that they do in Acalog: if you attach a Shared Core to a program, you won’t be able to edit the Shared Core within the program. It would require a separate proposal to make changes to the Shared Core. Changes to a Shared Core will impact all programs that it is attached to.

Prospective Curriculum (*Programs Only*)

Curriculog structures programs using a series of cores, sub-cores and even shared cores – matching the format of Acalog so that the two systems can easily communicate with one another and allow for the easy import of data between them.

Each core created can have a title, description, and courses attached to them. You can have any number of cores, multiple levels of cores – and even shared cores which allows for data to be shared across multiple programs.

The Prospective Curriculum field is specific to Program type proposals and is where you will build cores into your program and attach courses.

The Curriculum section has two views available: View Curriculum Courses and View Curriculum Schema.

View Curriculum Courses will be the default view, as courses must first be attached under View Curriculum Courses to be available for use within Cores under View Curriculum Schema. You will have the options of importing courses or manually adding them.

The screenshot shows the 'Prospective Curriculum' interface. At the top, there are buttons for 'View Curriculum Courses' and 'View Curriculum Schema'. A 'Preview Curriculum' button with a checkmark is also present. Below these, a list of courses is shown with their respective credit hours and a trash icon. At the bottom, there are 'Add Course' and 'Import Course' buttons.

Course	Credit Hours
COUN - 301 - Orientation to the Counseling Profession	Three
COUN - 315 - Philosophy of the Helping Relationship	Three
COUN - 316 - Parent and Family Dynamics	Three
COUN - 317 - Introduction to Assessment	Three
COUN - 409 - Group Leadership	Three
COUN - 410 - Introduction to Counseling Theory and Methods	Three
COUN - 412 - Career Development	Three
COUN - 414 - Home and Family Living	Three
COUN - 497 - Special Topics	One to Four

Note: if the “Import Course” option is not available, you will need to contact an administrator to grant you permission to import.

The dialog box is titled 'Add Course'. It has fields for 'Prefix', 'Code', and 'Name'. At the bottom are 'Add Course' and 'Cancel' buttons.

If you elect to manually add a course, you will need to provide a Prefix, Code and Name for that course. This option should be used sparingly, ideally for courses that may be going through a proposal at the same time and do not yet exist in your external system; especially if that system is Acalog as it may impact the program’s ability to import.



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The best practice for bringing in new courses to use within your proposal will be to import them. To import a course, select “Import Course”. A pop-up window will display featuring Integration Manager, providing a list of any catalogs your administrator has made available to you. Select the catalog you would like to import from.

Next, you will be presented with filter options that may be used to find the course you would like to import.

The search will default to searching through all courses, but you may use the “add filter” drop-down menu to select additional filtering options. Each option allows you to select a field from the courses template that you can then enter a value to search on.

Once you have added at least one filter, you cannot leave the field blank when you search, or you will receive zero results. It will also not accept partial searches – for example, ‘ACC’ will not return any results for ‘ACCT’; but you can use the * as a wildcard. Entering ‘ACC*’ for example, would return ‘ACCT’ courses.

The “Exclude previously imported items” checkbox is a toggle that would remove items that have been imported by any user from your list of search results. If unchecked, the items would appear in your results but would be italicized to indicate that they have been imported previously. It will not prevent you from importing the item a second time; it will just serve as an indicator.

Note: If the cache has been cleared by an administrator, the exclude previously imported items flag may be reset.

Import Data Into Your Proposal

Select an external system from which you would like to import courses.

Catalog: Curriculog Training Catalog

[Cancel Import](#)

Search Curriculog Training Catalog

Using the faceted search below, locate the course or program you would like to import into this proposal.

Filter Courses

Prefix = ACC*

Add another filter [Filter by field](#)

Start Date:

End Date:

Sort Results By:

Exclude previously imported items

[Search Available Curriculum](#)

[Select Another External System](#)

[Cancel Import](#)

Search Results (1 to 17 of 17)

ACCT 221 Principles of Accounting I

ACCT 222 Principles of Accounting II

ACCT 315 Managerial Accounting

ACCT 321 Intermediate Accounting I

ACCT 322 Intermediate Accounting II (previously imported)

ACCT 326 Microcomputer Applications in Accounting

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When reviewing the search results, you can click on them to add them to the proposal, and they will be added to the “Selected Courses” area at the bottom of the page. Selected courses will be indicated in a darker gold color.

When all the courses have been selected, click on “Add Courses to Proposal”.

Once courses are added, they will be listed in the “View Curriculum Courses” section of the proposal. If you would like to remove any, you can hover over them and a blue delete icon will appear will appear – clicking it will remove the course from the list.

Note: Only the prefix, code, and name of a course will appear within the programs in Curriculog.

AEC 316 Agricultural Marketing

Previous Next

Selected Courses

ACCT 326 Microcomputer Applications in Accounting
ACCT 322 Intermediate Accounting II
ACCT 321 Intermediate Accounting I
ACCT 315 Managerial Accounting
AEC 316 Agricultural Marketing

Add Courses to Proposal Select Another External System Cancel Import

Prospective Curriculum*

View Curriculum Courses View Curriculum Schema

COUN - 301 - Orientation to the Counseling Profession
COUN - 315 - Philosophy of the Helping Relationship
COUN - 316 - Parent and Family Dynamics
COUN - 317 - Introduction to Assessment

Prospective Curriculum* View Curriculum Schema

View Curriculum Courses View Curriculum Schema

COUN - 301 - Orientation to the Counseling Profession
COUN - 315 - Philosophy of the Helping Relationship

Now that courses have been added, they can be used within cores. To create a core, select “View Curriculum Schema”. Next, you will need to decide if you are going to create a New Core or if you are going to import an existing Shared Core from Acalog.

When you choose “Import Core”, it will launch Integration Manager, asking you to select the catalog you’d like to use. Next, you will be presented with a filter, allowing you search for a specific Shared Core to import.

When you select a Shared Core, it will be added to the list of available cores on the “View Curriculum Schema” schema tab, with a padlock symbol.

The Shared Core can be expanded for review by clicking on it, displaying the description and any attached courses or custom text that may be associated. **Contents within a Shared Core cannot be modified within the program.** This includes modifications to the title, description, courses associated, or any sub-cores. To make any modification to a Shared Core, you will need to create a new proposal and choose ‘Shared Core’ in the Program Type field.

When you click “New Core”, a new core will be added within the “View Curriculum Schema” tab with the default title of “New

Shared Core

Title
Shared Core

Description
Core description

Courses

ART 110 Drawing I
ART 111 Two-Dimensional Design
ART 112 Drawing II



Core." To modify the core, click on the "New Core" row. The box will expand displaying additional options, including a title and description field.

Replacing the title will update the text in the gray bar. The description field may or may not have a WYSIWYG editor available, depending upon the settings your administrator has selected.

Note: Remember that Permalinks imported from Acalog into Curriculog within Rich Text fields will be maintained, however you will not be able to create or modify them within Curriculog.

When you select "Add Courses" a dialogue box will display with courses that you may choose from. The courses in this list are populated based on the courses you have previously added on the "View Curriculum Courses" tab – if you do not see a course that you need to add, you will need to return to that tab to add it first before you can add it to your core. When you select a course, it will be highlighted blue. Once you've selected all the courses you would like to attach to the core, select "Add Course" and they will be listed under your core.

If the courses are not listed in the order you would like them, you may drag and drop the courses into the correct order. The courses will save automatically once you release them.

If you wish to remove any courses, hover over them and click on the blue delete icon to remove them. Removing them from the core does not remove them from the "View Curriculum Courses" tab, and you may use the course within other cores in this program.

Custom Text may be used to place text between courses – similar to the way that Ad-hoc text is used within Acalog. Clicking "Add Custom Text" will display a dialogue box where you may enter text. If your administrator has enabled rich text, you will be able to format the Custom Text using the provided WYSIWYG editor. When you are done entering your text, select "Add Custom Text".

Note: You must add at least one course before you can add Custom Text.



Once Custom Text has been added, it can be modified by selecting the pencil icon to the right of it – or removed by selecting the blue delete icon. You may also drag the Custom Text up or down throughout the list of courses to place it where you would like.

After you've finished making changes to a core, you may collapse it by selecting the gray bar displaying the core title.

To the left of the core title, you will see a blue icon which allows you to drag and drop the core. To the right of the core title, icon which will allow you to delete the core. If you choose to delete a core, you will see a dialogue box appear asking you to confirm if you would like to delete the core. Deleting the core will delete the title, description, and associated courses and Custom Text – although the courses will remain available within the “View Curriculum Courses” tab for use within other cores in the program. Each time you add a new core – either manually or by importing a Shared Core, it will appear at the bottom of the list.

Selecting icon will enable drag-and-drop functionality to move the core. If you would like to create a sub-core–meaning you would like to have a core appear below and indented under another–you will need to drag the second core down below the desired parent core, then move it in to the right to fall below the desired core. When you release the core, the ordering will save automatically.

Cores cannot be re-parented beneath a Shared Core, and Shared Cores and cannot be re-parented beneath a core. The programs and Shared Cores within Curriculog will follow the same rules and structure that they do within Acalog to ensure that they can send data back and forth. The system will prompt you with a reminder if you attempt to parent a Shared Core in a way that is not permitted.



You may create as many levels of sub-cores as needed to develop your program.

The third icon available within the Prospective Curriculum field is the Preview Curriculum icon. You may use the Preview Curriculum icon at any time to preview the Prospective Curriculum field.



Note: The Preview Curriculum tab displays ONLY the Prospective Curriculum field – it does not display any other elements of the program proposal or any of the course details beyond prefix, code, and name.

The preview will open a new window and display the contents of the Prospective Curriculum field with each core expanded. You will be able to see the title and description for each core, as well as the prefix, code, and name for each course that has been attached, and any associated Custom Text.

The preview will reflect the structure of your cores and indicate which are Shared Cores for reference.

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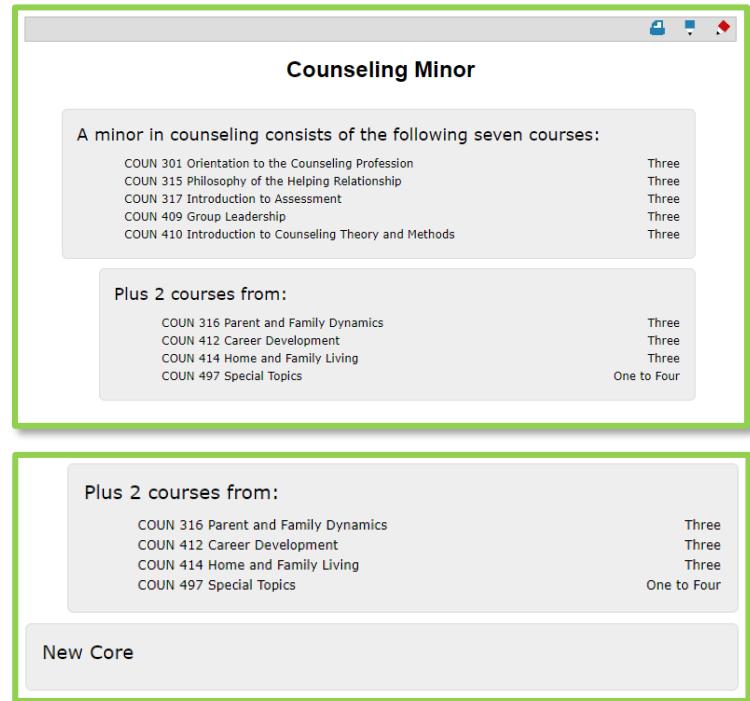
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The top right corner of the preview will contain three options – print , Show Curriculum Preview , and Show Curriculum Preview with Markup .

Print will launch your browser's print option to print this screen. Show Curriculum Preview with Markup – provided your administrator has enabled the user tracking – will indicate in green anything that has been added and indicate in red anything that has been removed. It will not specify which user performed which action in this view – you would need to use the “User Tracking” tool to see that level of detail. To return to the preview, you would choose the Show Curriculum Preview icon again or close the window to return to the program to make further modifications.



Counseling Minor

A minor in counseling consists of the following seven courses:

COUN 301 Orientation to the Counseling Profession	Three
COUN 315 Philosophy of the Helping Relationship	Three
COUN 317 Introduction to Assessment	Three
COUN 409 Group Leadership	Three
COUN 410 Introduction to Counseling Theory and Methods	Three

Plus 2 courses from:

COUN 316 Parent and Family Dynamics	Three
COUN 412 Career Development	Three
COUN 414 Home and Family Living	Three
COUN 497 Special Topics	One to Four

New Core



New Proposals

When you need to create a new proposal, from your Dashboard you'll need to click on the link for "New Proposal", and then choose from the list of available approval processes that your administrator has made available to you. There are four tabs across the top that can be used to help narrow your selection – All Processes, Courses, Programs, and Others.



- **All Processes** – Displays all Approval Processes within the System
- **Courses** – Displays only those of the Course type
- **Programs** – Displays only those of the Program type
- **Others** – Displays only those of the 'blank' type. These processes will not allow you to import or export information.

You can also use the "Sort by" drop-down menu to sort processes by either title or type to help select. Processes featuring the arrows indicate a crosslisting option, within course type processes. Processes with a title that is grayed out and italicized are in edit mode and undergoing revisions by the administrator – you will be unable to select these at this time. Processes that are grayed out are deactivated and unable to be used.

If you would like to preview an approval process before starting it, you can select the preview form icon . This will open a new window, previewing only the form of the proposal. None of the fields will be functional within the preview.

To begin a new proposal, click the new proposal icon .

Creating New Items

When you are filling in a proposal to create a new item, you will need to fill in all required fields within the form. Required fields are noted with an asterisk. As you work in the form, be sure to save your work often by using the save at either the top of the page, or the floating "Save All Changes" at the bottom. If you try to navigate away from the page without saving your changes, the browser will prompt you to save before allowing you to leave.

Name*
<input type="text"/>

Once you have reached the end of the form, you will need to launch the proposal to send it into the workflow. To launch it, you will need to scroll back to the top of the page and click the "Validate and Launch" icon from the upper left corner.

Could Not Launch Proposal

Please correct the following errors before launching the proposal.

Proposal has validation errors

Ok Show Me

At this time, the system will verify if any required fields have been left empty. If they have, they will be highlighted in yellow and the proposal will be unable to launch. A message will appear indicating that you have missing information – if you click "Show me", it will take you to the first of the required fields.

Hierarchy Owner*

Select an option

Hierarchy Owner is required.



Once all the required fields have been filled in, the proposal will be able to launch. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the work flow. You may choose to review the section on [Editing a Proposal](#), or move on to Providing a Decision.

Changes

When you are creating a proposal for revisions to a course or program that already exists – you will begin by importing the existing catalog information.

Note: *If this proposal is for a program, the first step will be to indicate if this is a program or a Shared Core in the Program Type field. This must be declared prior to choosing the import icon.*

Start by selecting the import icon  from the upper left corner of the proposal.

This will open a pop-up window listing all available catalogs you can import from. The available catalogs are determined by your System Administrator.

Next, you will be presented with filter options that may be used to find the course you would like to import.

The search will default to searching through all courses, but you may use the “add filter” drop-down menu to select additional filtering options. Each option allows you to select a field from the courses template that you can then enter a value to search on.

Once you have added at least one filter, you cannot leave the field blank when you search, or you will receive zero results. It will also not accept partial searches – for example, ‘ACC’ will not return any results for ‘ACCT’; but you can use the * as a wildcard. Entering ‘ACC*’ for example, would return ‘ACCT’ courses.

Type of Program*

Program
 Shared Core

Import Data Into Your Proposal

Select an external system from which you would like to import courses.

Acalog: Curriculog Training Catalog

[Cancel Import](#)

Search Curriculog Training Catalog

Using the faceted search below, locate the course or program you would like to import into this proposal.

Filter Courses

Prefix = ACC* [X](#)

Add another filter [Filter by field](#)

Start Date: End Date: Sort Results By: [Prefix X](#) [Code X](#) [Name X](#)

Exclude previously imported items

[Search Available Curriculum](#) [Select Another External System](#) [Cancel Import](#)

Search Results (1 to 17 of 17)

- ACCT 221 Principles of Accounting I
- ACCT 222 Principles of Accounting II
- ACCT 315 Managerial Accounting
- ACCT 321 Intermediate Accounting I



The “Exclude previously imported items” checkbox is a toggle that would remove items that have been imported by any user from your list of search results. If unchecked, the items would appear in your results but would be italicized to indicate that they have been imported previously. It will not prevent you from importing the item a second time; it will just serve as an indicator.

Note: If the cache has been cleared by an administrator, the exclude previously imported items flag may be reset.

Once your search has located the item you would like to import, click on the title. You will then be able to preview all mapped data available to import. By default, all details will be marked for import, but you can choose to uncheck any items if you do not want to import them. To complete the import, click ‘Import this Item’. You may also choose to “Return to Search” to choose another item, or “Select Another External System” to choose another catalog, or “Cancel Import” to cancel entirely.

Once you have imported the information, the window will close, and your proposal will be populated with all of the information from the course catalog.

Now that you have imported the existing catalog data; the best practice is that you do **NOT** make changes to the existing information. Complete any remaining required fields and launch your proposal by selecting the launch icon  from the upper left corner of the Proposal. This will be critical to ensuring the User Tracking function is able to capture all edits as the tracking begins on step one.

Once the proposal has been launched, it will move to the first step in the process. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the workflow. You may choose to review the section on [Editing a Proposal](#), or move on to [Providing a Decision](#).

ACCT 322 Intermediate Accounting II (previously imported)
ACCT 326 Microcomputer Applications in Accounting

Import Data Into Your Proposal

Confirm the fields that will be imported into your proposal (only fields that are mapped will be listed here). If you would like to prevent the imported data from overwriting an existing field in your proposal, click “Import Field” to uncheck that field.

Once you click Import, your data will be validated against the proposal. Any data that is incorrect will have a message telling you what is wrong with the data, and it will not be imported into the form to prevent errors.

Field Name	Data Preview	Import Field
» Data Points: Hierarchy Owner	Agricultural Sciences	<input checked="" type="checkbox"/>
» Data Points: Name	Wildlife Management I	<input checked="" type="checkbox"/>
» Data Points: Prefix	AG	<input checked="" type="checkbox"/>
» Data Points: Code	335	<input checked="" type="checkbox"/>
» Data Points: Description	Introduction to wildlife management. Principal wild birds and animals of economic importance to Florida farms. Methods and techniques of population manipulation.	<input checked="" type="checkbox"/>
» Data Points: When Offered	[no data]	<input type="checkbox"/>
» Data Points: Course OID	156952	<input checked="" type="checkbox"/>

[Import This Item](#) [Return to Search](#) [Select Another External System](#) [Cancel Import](#)



Proposal Toolbox

The Proposal Toolbox appears on the right-hand side of the screen when working within any proposal and includes several options for interacting with your proposals.

Discussion

The first icon indicates the Discussion tab. The Discussion tab is the default view of the Proposal Toolbox that you will see when first accessing a proposal. It is used to display the User Tracking information, as well as any comments that have been entered on the proposal. More details about the User Tracking and comments are listed under the Editing a Proposal section.

Status

The next icon is for the Status tab. The status tab will allow you to review the Proposal History – a log of all of the steps that have already occurred, the step it is currently on, and any steps that still need to happen.

On each step you'll find the name of it at the top along with the status – for example, this screenshot indicates that the step was approved. Under Participants you will be able to see any users who were required to take action on this step; if they performed any edits on this proposal you will see an edit color assigned to them (red, in this example), and if they provided a decision you will see the decision in the circle next to their name (approve).



To review step options and see permission levels, click .



In the Rules portion, you will be able to see the settings for each step.

- *Can Edit:* Yes indicates that a user on this step will be able to make modifications.
- *Can Comment:* Yes indicates that a user on this step will be able to leave comments.
- *Signature required:* Yes indicates that a user on this step will be required to provide a signature when they place their decision.
- *Agenda Available:* No indicates that this step will not allow for committee functionality, or for the proposal to be placed on an Agenda at this time.
- *Comments viewable by:* Every user indicates the level of transparency the administrator has set.

Note: Only an administrator can modify these settings.

Knowing what permissions you have on your step will make your work within Curriculog easier. Using the step in the screenshot to the right as an example – knowing that an ‘Agenda Available’ is set to no, you won’t be looking to create an Agenda for this step or wonder why there are no committee options available.

Signatures

If your administrator chooses to require a signature, they will

be recorded on the signature tab  when a user makes a decision on a proposal. Depending upon the settings – a user may provide their signature in one of two ways. They may either provide it via a signature pin, or through a paper document that is scanned and uploaded. Both types of signatures will be recorded in the signatures tab, and if the paper signature is used, it will be available for download.

As a best practice, we recommend using the signature pin.

What is this step set up to do?

Your System Administrator created this proposal’s workflow steps with certain settings. These settings will determine what you can do on each step.

Participants

Originator

Conditions

Mandatory: Yes

Rules

Can Edit: Yes

Can Comment: Yes

Signature required: Yes

Agenda available: No

Comments viewable by: Every user involved in the proposal at any time

Decisions

Required Participation: 100%

Required for approval: 100%

Additional requests: hold, cancel, custom route, suspend

If rejected, return to: Previous Step

Deadlines

Deadline: No

Reminders: Every 3 days

Signatures

Originator

Status:Approved

Diana Prince 07/15/2020



Files

The Files  tab will allow you to attach documentation relevant to your proposals. Any user who is an active participant on a step may upload files to a proposal, and although the maximum file size limit is 20 MB for each file – there is no limit to the number of files that may be attached to the proposal.

Once files have been attached, they will be visible to all users. The file markup will indicate who uploaded each file and when through an activity log.

Note: In older versions of browsers, uploading files as attachments that contained spaces in the file names may have resulted in difficulty when downloading the file later. Although newer versions of browsers are no longer experiencing this issue, as a best practice, when uploading attachments, we recommend that you ensure there are no spaces in the file name.

Decisions

Once you have completed your work on the proposal and you are ready for it to move to the next step, you will need to enter a decision. To provide a decision, select the Decisions tab  from the Proposal Toolbox.

The decisions that are available to you will vary based on the settings your administrator has selected for each step, but this manual will cover all options available.

- **Approve** - Selecting Approve is indicating that you are approving the proposal in its current state and are signing off on it to move to the next step in its workflow. If you are the only participant on the step, the proposal will advance automatically. Entering a comment is optional when selecting Approve.
 - If you are **not** the only participant on the step, and the step requires 100% approval in order to advance, then the step will wait until all participants unanimously agree to approve or reject.
 - If you are **not** the only participant on the step, and the step requires any other threshold lower than 100% approval in order to advance, the proposal will remain on the step until all participants have voted even if it has received enough votes to be approved. This means that if the vote is set to require 75% approval and three of the four participants have already approved, the proposal will remain on the current step until the fourth participant makes a decision.
 - If this is a committee step but you are a non-voting member, the step will not move on until the Agenda Administrator has placed their decision.

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Upload File

File No file selected.

Attached Files

 Curriculog - Project Start Documentation 2020.pdf
uploaded by Mara Sansolo, 7/7/2020 11:19 am

Your Decision

What would you like to do with this proposal?

Approve Hold
 Reject Suspend
 Cancel
 Custom Route

Please comment on your decision below.



- If this is a committee step and you are the Agenda Administrator, when you place the decision to approve the step – you will be placing it on behalf of the committee and it will advance to the next step.
- **Reject** - Rejecting a proposal indicates that you are not approving of it in its current state. You will be required to enter comments in order to submit the decision to reject, and as a best practice we would strongly suggest using the comments to explain the reasoning behind submitting a rejection. Depending upon the settings an administrator chooses – a proposal may take one of two paths when it has received a rejection.
 - **Originator** – If the originator chooses to send a proposal back to the originator, the proposal will create a new step titled ‘Originator’, followed by each step from the beginning. This effectively causes the workflow to start over.
 - **Previous Step** – If the originator chooses to send a proposal back to the previous step, the proposal will return to the previous step only and then resume the normal workflow.
- **Hold** - Submits a request for the proposal to not advance in the workflow. The request is sent to the administrator, who will approve or reject the request. If the administrator approves the request and places the proposal on hold, the users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. This would typically be used to ask for additional time for revisions on a proposal when a deadline is approaching, as the item will not trigger the deadline when it has been placed on hold. Only an administrator can lift the hold on a proposal.
- **Suspend** - Submits a request for the proposal to be suspended from the workflow. Like the request for ‘Hold’, it is sent to the administrator, who will approve or reject the request. If the administrator approves the request and suspends the proposal, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed.

Note: *In the case of both Hold and Suspend, if you were to place a proposal on either status after it had been in progress for 6 days, and it had an upcoming deadline after 10 days – and the proposal stayed on its status of Hold or Suspend for another 10 days – the day that you return it to the workflow the deadline will trigger as it has now passed its original 10 day deadline.*

- **Cancel** - Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the administrator who will approve or reject the request. If the administrator approves the cancel request, the proposal will be referred to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision. This is the only way you can delete a proposal after it has been launched.
- **Custom Route** - A Custom Route is an additional ad hoc step outside the steps in the approval process that the administrator originally provided and require administrator approval. They will allow you to invite additional users or committees into a workflow for additional feedback. Custom Routes are covered in more detail in the next section.



Custom Routes

Custom Routes  have a tab within the Proposal Toolbox where you will establish your Custom Route but starting them begins as a decision.

To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab, and then select "Make My Decision."

This will direct you to the Custom Route tab to configure the options for your Custom Route. The first option available will be for you to decide if you would like to re-name the step. It will default to "Custom Route" but if you would like to change it you can click in the field and replace the text.

The next option is to indicate who you would like to bring into the workflow by choosing the participants. Select the grey arrow to the left of "Participants" and the option will expand. Select "Add Participant".

This will launch a new window titled "Who is involved on this step?" and will display two options initially – Role Types and Hierarchy.

In most cases, when adding a participant to a Custom Route, you would be looking for a specific user. To locate a user, you can use the  symbol to expand Hierarchy, then again to expand a specific entity, and then a role until you see the user.

Click on the user – or users - to select them and their row will be highlighted blue. Next select "Add Role(s)".

Note: When creating a Custom Route, you can only select a user if they already have a role within the Hierarchy. You will not be able to search the User Accounts module.

Once the users have been added, they will be listed on the step under "Participants." If you need to remove a user, you can click "Add Participant" again, then click the user you would like to remove which will remove the blue highlight from their name and click "Add Roles" again and the user(s) will be removed.

Note: You may also choose users based on Role Types; however, the users that are brought into the proposal will be based on the Hierarchy selection made on the form at launch.

Custom Route (requested by Mara Sansolo)

[Remove Step](#)

Step Name: Step Name:

Custom Route

Participants

[Add Participant](#)

Who is involved on this step?

 Role Types

 Hierarchy

  Acalog University

 Acalog Catalog Manager

 Acalog University Registrar

 Custom Route Committee 

 Digarc Curriculog Administrator

Heather Kelly

 Honors Curriculum Committee Review

 College of Arts & Humanities

[Add Role\(s\)](#)

[Cancel](#)



Once you have determined the participants for the Custom Route, the next step will be to determine what they will be allowed to do by setting the Rules. To view the options available under Rules, click the arrow to the left to expand the section.

There are four options you will need to determine within the Rules section.

First, you will need to decide if the users you are bringing into the proposal on Custom Route will have the ability to edit the proposal and/or make comments. When making this decision, consider the reason for the Custom Route: it may be that you only need feedback from another individual and a comment is sufficient – or it may be that you need to extend editing rights to a new committee.

Next, you will need to decide if this step requires a signature from the user. If you require a signature from a user, they will need to enter either their signature pin or provide a scanned paper copy of their signature in order to approve the step.

The next option is related to committees – and is only available if you have chosen a role type associated with a committee as your participant. If this option is available and selected – it indicates that this step will function as a committee step; the user elected as the Agenda Administrator will vote on behalf of the group and be able to create an Agenda as needed. If you've not selected a role type associated with a committee – this option will not be accessible.

The last option is a drop-down menu allowing you to determine who may view comments made during this step. You may allow all users (including guests without logins) to view comments or you may restrict it to one of the other options available from the drop-down menu.

Note: The transparency level of the system selected by the administrator may override the setting you select here. For example, if the administrator sets the transparency of the system to Restricted and you set the step to Every User – the Restricted settings will override the Every User settings.

Rules

What work is allowed on each Proposal?

Edit Proposal
 Make Comments

Is a signature required?

Yes

Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?

Yes

Who can view the comments during this step?

Every user (login not required)

Who can view the comments during this step?

Every user (login not required)
Every user (login not required)
Every user who has a login
Every user in the hierarchy branch that owns the item
Every user involved in the proposal at any step
Every user involved in the current step PLUS the originator
Only those involved on the current step



The Decisions section is where you will determine the types of decisions users can provide, and the direction the proposal will move in.

The first selection indicates the type of decision your Participant(s) will have; there are three different types of decisions to designate:

- **Approve / Reject 100% for approval** – This option indicates that all users on the step must come to a unanimous decision for the step to be approved or rejected. If all users provide a decision and it is not unanimous, the step will not advance until users either change their votes to reach 100%, a deadline is reached an automatic decision is triggered, or an administrator force approves/rejects.
- **Vote: ___ % for approval** – This option indicates that a threshold must be reached for the step to advanced, **however it still requires that all users on the step provide a decision**. For example, if the step has 4 users, and the threshold is set to 75% - then only 3 of the 4 users must vote “approve”. If 3 of the 4 log-in and vote right away – the step will **not** advance to the step immediately. It will wait and allow the fourth user the opportunity to log in, review the proposal and changes, provide comments, and provide a decision – even if their decision cannot change the outcome. Only when all users on the step, **and** the vote threshold have been reached will the step advance.
- **Quorum Vote: Require ___ % participation** – This option indicates that a threshold must be reached for the step to advanced, **however it does not require that all users on the step provide a decision**. For example, if the step has 2 users, and the threshold is set to 50% - then only 1 of the 2 users must vote to “approve”. Once the 1 user votes, it then meets the 50% threshold and will advance the step without the other user’s vote.

Decisions

What type of decision is this?

Require 100% participation and unanimous approval.
 Require 100% participation and _____ % for approval.
 Require _____ % participation and majority approval.

What kind of decision flags will you allow to be used on this proposal?

Hold Suspend
 Cancel

Where will the proposal go after the custom route?

Proposal should come back to this step.
 Proposal should advance to the next step.

Who should be notified when the step is completed?

If Approved: *If Rejected:*

Add Participant **Add Participant**

The next option allows you to offer decision flags to the users on the Custom Route, which will provide the users on this step options on their decision beyond Approve and Reject. The options that you can offer users are limited to Hold, Cancel, and Suspend – you will not be able to provide Custom Route as an option from a Custom Route. You can read the full descriptions for the decision options under the Decisions section.

Note: You will only be able to create one Custom Route per step, and you may not create a Custom Route from within another Custom Route.

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The next option determines the path the proposal will take once the Custom Route has been approved. There are two options available and the path you choose will vary based on your needs for the Custom Route.

- **Proposal should come back to this step.** This option is often chosen when the reason for a Custom Route is to invite a feedback loop. When you select this option, the proposal will advance to the Custom Route step when the administrator approves it. Once the Custom Route step has been completed and approved, it will return to you for further revisions and a decision. Once you provide your decision, it will then advance to the next step in the workflow.

Note: You cannot create an additional Custom Route as a decision, as you may only create one per step.

- **Proposal should advance to the next step.** This option is often selected when you are inviting a user into the workflow to make additional changes or comments and allow the workflow to progress after with no additional revisions on your part. This means that once the administrator approves the request for a Custom Route, you will still need to complete your step by providing your final decision. At that time, the proposal will move on to the Custom Route, and then on to the next step in the workflow.

The last option on the Decisions tab is an **additional** notification that you can choose to provide, if the proposal is either approved or rejected. This notification is in addition to the one automatically sent to the users on the step and may be different based on the approval or rejection. To add a user to send a notification to, click on “Add Participant”, then use the ▾ to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.

The last section of the Custom Route that you can set is the Deadlines/Reminders option. This option allows you to set a number of days to be allowed for the step before an automatic action will occur and you can choose if reminders are to be sent to the users involved on the step.

The first option is for setting a deadline on the step. A deadline is a threshold set in a number of days for the step; and if that threshold is passed an automatic action will occur. If you would like to set a deadline, check the box labeled “Set Deadline.”

Deadlines/Reminders

Would you like to set a deadline for this step?

Set Deadline

Move Step after days.

Send reminder days(s) before deadline.

What should happen if the deadline passes?

Automatically Reject
 Automatically Approve

Who should you notify when the deadline is passed?

[Add Participant](#)

Would you like to set a timed reminder for this step?

Send every days(s).
Send after days(s).



Once this has been checked, the next two options become available.

- **Move Step after ____ days.** This requires a whole number to be entered – for example “30.” Once 30 calendar days have passed with no decision on the step, this deadline will be triggered.

Note: Curriculog does not observe holidays or weekends and will continue to count towards the deadline.

- **Send reminder ____ day(s) before deadline.** This will also require a whole number to be entered, and ideally a smaller option than one that was used for the deadline. If your deadline was set to 30 as our example above, then perhaps this option may be set to “15”. On the 15th day on this step with no decision, a reminder will be sent to the user that the deadline is approaching, and they need to take action to avoid the automatic decision.

The next option is to choose which of the two automatic actions should occur when the deadline passes. If either of these actions were to occur, the step will follow the path the administrator has outlined. For approvals, this means advancing to the next step of the workflow. For rejections, it may either return to the originator or return to the previous step.

- **Automatically Reject**
- **Automatically Approve**

You may also add users to be notified if the deadline passes without action. This notification is in addition to notifying those on the step and separate from the approve/reject notification. To add a user to send a notification to, click on “Add Participant”, then use the to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.

The last option of the Deadlines/Reminders section will be to include timed reminders. These reminders may be sent to the users of this step regardless of if you choose to use the deadline feature.

- **Send every ____ day(s).** This option requires a whole number, for example, “10”. This would send a reminder to the user every 10 days until the step has received a decision.
- **Send after ____ day(s).** This option requires a whole number, for example, “5”. This option would send a reminder to the user after 5 days have passed with no decision having been provided on the step.



After selecting all the options associated with your Custom Route, you will be required to enter a comment. The comment is usually used to provide explanation to the user being invited and requires a minimum of two characters to be entered.

Below the comment box are three buttons:

- **Edit Custom Route** You will be able to review all the selections you have made on the Custom Route, and if you are unhappy with any of the selections – you can choose to edit it further.
- **Request Custom Route** Selecting Request Custom Route will send this request to the administrator for review. The Custom Route will remain as pending until the administrator has either approved or rejected the request. While this is pending, you can continue to revise the proposal. Once it has been approved – depending upon your selections within the Custom Route, it may advance to the Custom Route immediately and be returned to you later – or it may continue in the workflow.
- **Cancel Custom Route** If you decide you no longer want to proceed with the Custom route, you can choose this option to cancel and continue working on the proposal and provide your decision.

Please comment on this custom route

Please let me know what you think about this proposal so far!

Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.

If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.

[Edit Custom Route](#)

[Request Custom Route](#) [Cancel Custom Route](#)

Crosslistings

Crosslistings are a way to tie course proposals together based on information they share across one or more fields – for example, when two courses may share the same code, name, description and credits but are housed within two different departments and so have a different hierarchy and prefix. The crosslisting functionality within Curriculog will allow you to create multiple proposals based off a single primary proposal - allowing you to update those shared fields in all crosslisted proposals with modifications just to the primary.

The administrator will determine when the crosslisting functionality will be available, and it will only be available within course approval processes. If your administrator has made crosslistings available, you will see the crosslisting icon  appear to the left of the approval process's title.



Note: The crosslisting icon indicates the crosslisting functionality as an option. Although it is available for use within these approval processes, it is not required that you create a crosslisting each time you select this process.

To create a proposal with a crosslisting, you will begin just like any other proposal. For more details on starting a new proposal, see the [New Proposal](#) section.

Note: If you are importing information into your proposal from an external source, you will only be able to import information into the primary proposal. You will not be able to import into any of the crosslistings.

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The initial form that is being filled out will be referred to as the primary; and all crosslistings created within this proposal will be based on the information provided within this primary proposal.

Once all the fields have been filled out, **before** launching the proposal, you can select the crosslisting icon from the Proposal Toolbox and select “Add Crosslisting.”

Note: *Crosslistings must be added to a proposal prior to launching.*

Once they have been launched, you will not be able to add additional crosslisted items.

Once you have selected Add Crosslisting, the second proposal will appear listed below the primary with the crosslisting icon and the additional text of (crosslisting) added to the title. You can add multiple crosslistings to this proposal by selecting “Add Crosslisting” as needed.

Proposal Toolbox

Unlaunched

Crosslisting

Do you want to add a Crosslisted Course?

Add Crosslisting

★ AEC - 100 - Agricultural Economics

★ AEC - 100 - Agricultural Economics

AEC - 100 - Agricultural Economics (crosslisting)

AEC - 100 - Agricultural Economics (crosslisting 2)

To remove any crosslisting from the list, select the blue delete icon. To edit any crosslisted proposal, click the name of the proposal.

When editing a crosslisting proposal, you will find that some fields are greyed out and already contain content. These fields are prepopulated with information from the primary proposal and you will not be able to modify the contents of those fields within the crosslisting.



These fields are selected by the administrator and will be the same on each crosslisting associated with this primary – modifications to the content of these fields can only be made by returning to the primary proposal by selecting the primary icon in the upper left corner. From the primary, you can return to the crosslisting by selecting the crosslisting icon from the Proposal Toolbox and selecting the crosslisting again.

As with any proposal, all fields marked with an asterisk in a crosslisted proposal must be filled in and users must be present on each step of the workflow prior to being able to launch. Changes will need to be saved using the “Save All Changes” icon found at the top of the page, or the floating button found at the bottom of the page prior to navigation away from the page.

When you are done working within the crosslisting and you are ready to launch the proposal, you will need to return to the primary proposal, using the primary icon in the upper left corner - the same location as the launch icon. When you launch from the primary, you will also launch all crosslisted proposals associated with it at the same time.

Depending on the settings the administrator has selected, when you launch the proposals it may first be sent to the administrator for review prior to entering the workflow. The administrator will receive notification and an opportunity to review the primary and all crosslistings and may choose to approve or reject them.

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Once launched, they will appear in the tasks window as separate proposals and will follow the steps of their workflows as laid out by the administrator.

When viewing tasks that contain crosslistings, you will see the crosslistings icon  appear to the right of the name of the proposal. Hovering over the icon will indicate the related proposals and their relationship.

When editing the proposal, selecting the crosslisting icon  from the Proposal Toolbox will display all associated proposals allowing quick access to each of them. You may or may not be able to work on the crosslisted proposals depending upon the settings of their workflows.

All fields within the primary will be editable, and any edits made to linked fields will automatically update within the crosslisted proposal. Linked fields in the crosslistings will be unable to be modified.

Note: User tracking will record all changes made to the primary and crosslisting proposals; however, changes to the linked fields are only recorded on the primary proposal as that is the only proposal in which changes have actually occurred.

 AEC - 100 - Agricultural Economics
1. 2020-2021 New Course

Last Activity: Jul 7, 2020 1:05 PM by Mara Sansolo

Last Activity: May 22, 2020 9:02 AM by Mara Sansolo
Crosslistings: AEC - 100 - Agricultural Economics (crosslisting), AEC - 100 - Agricultural Economics (crosslisting 2)
 AEC - 100 - Agricultural Economics

Proposal Toolbox

Crosslisting
This proposal is associated with the crosslisted proposals below.

 AEC - 100 - Agricultural Economics
 AEC - 100 - Agricultural Economics (crosslisting)
 AEC - 100 - Agricultural Economics (crosslisting 2)

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AGENDAS

The Agendas module provide functionality to create a meeting agenda for discussing proposals that require a committee as a part of the approval process. A committee may be made up of several individuals which Curriculog will split into two groups: non-voting members and Agenda Administrators.

- **Non-voting member** Users on the proposal may edit or comment if the step allows, however rather than providing a decision you are providing an opinion. You may place the opinion to indicate your preference for an approval or a rejection, however your vote is not counted towards the final approval or rejection. Only users serving as the Agenda Administrator will have their votes counted.
- **Agenda Administrator** If you are designated as an Agenda Administrator, your name will appear with an asterisk beside it on the step and you will now be responsible for placing a vote on behalf of the committee and have the option for creating an agenda if one is needed. Non-voting members may place opinions on the step, but only the votes of the Agenda Administrator will be counted. There may be more than one Agenda Administrator on a step if the administrator chooses, and in that case all users designated would be required to vote for the step to advance.

Note: An Agenda Administrator does not have all the rights and permissions of a system administrator and will not have access to the Administrator Dashboard.

Only Agenda Administrators can create, edit, publish and make decisions upon an agenda, and only when a proposal has reached a committee step.

When you navigate to the Agendas Module, you will see four tabs available across the top:

- **My Agendas** This tab will house Agendas that you have created and are still in progress or are completed but not yet marked as archived.
- **All Agendas** This tab houses Agendas by all users that are still in progress or are completed but not yet marked as archived.
- **My Archived Agendas** This tab houses all Agendas that you have created that are completed and marked as archived. Marching them archived moves them to this tab to be housed indefinitely to alleviate clutter on the My Agendas or All Agendas tab.
- **Archived Agendas** This tab houses all Agendas by all users that are completed and marked as archived. Marching them archived moves them to this tab to be housed indefinitely to alleviate clutter on the My Agendas or All Agendas tab.

Agenda Name	Proposals	Created
New Agenda 2/24/2020	0	24 Feb 2020 by Mara Sansolo
ACCT 501	1	28 Feb 2020 by Michael Patterson
Agenda	1	07 Jul 2020 by Mara Sansolo

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On each tab, you will see 10 Agendas at a time listed. You can use the “Next 10” or “Previous 10” to navigate through the list. Each row will indicate the name of the Agenda, the number of proposals included, the date it was created, and the name of the Agenda Administrator who created it.

Friday Meeting
Proposals: 1
Created: 22 May 2020 by Mara Sansolo

If the Agenda is open, still has active proposals and you are the Agenda Administrator who created it, you will see three icons when hovering over the name of it: View Agenda Summary , Edit Agenda , and Print Agenda .

View Agenda Summary will provide a flyout on the right side of the screen allowing you to view an overview of the Agenda including the name, current status, committee involved, associated notes, and attached proposals.

Tuesday Curriculum Meeting

Agenda Information

Name

Tuesday Curriculum Meeting

Status

Published

Committee

Instructional Design Review Committee

Notes

time, location, pizza will be provided

Proposals

ASTR - 101 - Astronomy of Solar System

Print Agenda will launch a new window containing a print friendly version of the Agenda. This view will feature the details of Agenda and forms of each attached proposal.

Edit Agenda will return you to the Manage Agenda screen. The upper right side of the screen contains a print icon and a help icon , and the upper left may contain the unpublish icon or the Complete Agenda icon . You will not be able to change the name, committee, status, or created by options of a published Agenda but you are able to edit the notes field. This will allow you to use the notes field to enter relevant details from discussions surrounding your proposals, or minutes from a meeting.

At the bottom you will find a list of all attached proposals. Hovering over them will provide the View Proposal Summary , and View Proposal icons and clicking anywhere in the row will expand the proposals summary in the right pane to allow for a quick review. Although you can navigate to the proposal using the View Proposal icon in the event changes are needed – you are also able to provide decisions directly from the Agenda by hovering over the decision drop-down arrow. This will provide you with all available decision options on the step



The unpublish icon will only be available on Agendas until a decision has been made on at least one of the attached proposals. If no decision has been provided on any proposal, you can select this icon to change the status of the Agenda back to unpublished, allowing you to modify the proposals that have been attached, the Agenda's name, or the committee associated. Once a decision has been provided for any attached proposal, this icon becomes the Complete Agenda icon. When the Complete Agenda icon is selected, any proposals without a decision will be removed from the Agenda to be able to be included in other Agendas; this Agenda becomes completed, and you will have the option to archive the Agenda.

Note: There is no option to delete Agendas once at least one decision has been provided on them.

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Create a New Agenda

The Agenda Administrator will have the ability to create a new Agenda when a proposal has reached a step in their workflow that is a committee step. To create a new Agenda, you will need to navigate to the Agendas module and then select "New Agenda."

The next step will be to fill in the form for the Agenda, starting with the Agenda name. This is typically the name of the meeting being held or named after the committee conducting it. Once the agenda name is entered, click "Add Committee." The new window will provide a list of all eligible committees. A committee will be considered eligible if you are the Agenda Administrator for that committee. Once your committee is selected, click "Done Selecting Committees" to add it to the Agenda.

The notes field allows you to enter notes for this Agenda. You may choose to include additional information that may be covered in this meeting or notes about when and where it should take place.

Note: Although there is no limit to the amount of text you can place in the notes field, there are no attachments available within the Agendas.

Next, click on Add Proposals to add the proposals to the agenda for review. A dialogue box will open displaying any eligible proposals.

Select the proposals to add to the Agenda and then click "Done Selecting Proposals." The proposals will now appear in the Proposals section of the Agenda. You may view the Proposal Summary or the Proposal from the appropriate icon displayed when hovering over the proposal within the Agenda.

Publishing the Agenda will make the Agenda available to all users within Curriculog and will include a link on the current step of each proposal currently associated with the Agenda. To publish the agenda, navigate to the icon in the upper left.



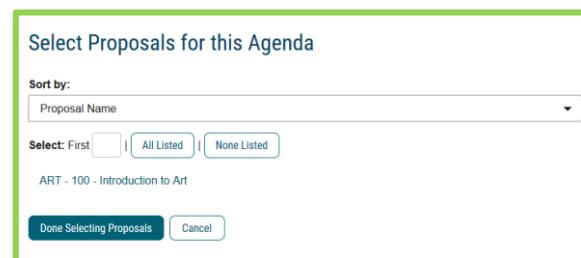
Select a Committee

Instructional Design Review Committee

Library Science Review Committee

Done Selecting Committees

Cancel





ACCOUNTS

Users

This tab will display a list of all users within Curriculog. You can sort results by Name, Role Type, or Entity using the drop-down menu in the upper left.

- **Name** Sorts users alphabetically by last name
- **Role Type** Sorts users based on the role types that have been assigned to them by the administrator. For example, department chair.
- **Entity** Sorts users based on the hierarchy entities in which their roles fall. For example, if Diana Prince is the Art Department Head then selecting the Art department as the entity would return her user account.

You can also use the alphabet links to filter the list of users displayed. Selecting a letter will jump to the first section of users whose last name begins with that letter. Users will be displayed ten at a time on the page, and you can use the “Next 10” or “Previous 10” options at the bottom of the page to scroll through them.

When hovering over a user, a Send Message icon will appear to the far-right end of that row and indicates that you may send a message to that user. When you select the icon, a flyout will appear in the right pane with the user's name populated in the “To” field. You may choose more than one user to send a message to at a time. The “From” e-mail will be auto-generated by the system and cannot be modified. You can provide any subject or message, and if you would like a copy of the e-mail to be sent to you – be sure to click the checkbox for “Copy me on this email” at the bottom before clicking “Send Message.” When the e-mail is sent a copy will not be maintained within Curriculog.

When you select a user's name from the list, the flyout on the right will display the user's personal information including their first and last name and e-mail address, and any roles or committees that have been assigned to them by the administrator. You will not be able to modify another user's account in any way unless you are an administrator.

The screenshot shows a user interface for sorting a list of users. At the top, there are two tabs: "Users" (selected) and "My Settings". Below the tabs is a "Sort by:" dropdown menu with three options: "Name", "Role Type", and "Entity". Under "Name", there is a dropdown menu with letters A through M, and "All Users" is selected. Below the dropdown is a list of names, with the first item being "Name".

The screenshot shows a "Send Message" interface. It includes fields for "To" (Bancroft, Margaret), "From" (no-reply@curriculog.com), and "Subject". Below these is a "Message" area with a rich text editor toolbar. At the bottom of the message area is a checked checkbox labeled "Copy me on this email".

The screenshot shows a user profile flyout for "Bancroft, Margaret". It includes sections for "Personal Information" (First Name: Margaret, Last Name: Bancroft, Email: mbancroft@digarc.com), "Roles" (Education Committee Member, Counseling Committee Member, Counseling Faculty, Curriculum and Instruction Faculty, Education Faculty), and a sidebar with the user's name and a "Personal Information" link.

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My Settings

My Settings will allow you to review the settings for your own account. You can access this information in two ways: you can either hover over your name in the upper right corner of Curriculog and choose “My Settings” from the drop-down, or you can navigate to the Accounts module and choose the “My Settings” tab.

This tab will populate only your user account in the left pane, and when you select it you will see your information appear in the flyout on the right.

The first portion, Personal Information, will contain your first and last name, e-mail address, and password information. You will be able to change any of this information on your own account at any time. If you make any changes, click “Save Personal Information.”

Note: If you are using remote authentication or SSO to provide credentials to log in to Curriculog, you must ensure that any changes you make match your on-campus provider. If you are unsure, please see your administrator

The next section will detail the roles that have been assigned to you. Roles are listed first, and any committees you may serve on will be listed after, and if you are an Agenda Administrator it will be noted with an asterisk. You will not be able to modify any of the roles that have been assigned to you.

Mara Sansolo
My Settings

CURRICULOG Proposals Agendas Accounts Reports
Users My Settings

Sansolo, Mara
Personal Information
First Name: Mara
Last Name: Sansolo
Email: msansolo@digarc.com
Password
Change Password
Save Personal Information Cancel

Roles
Library Science Review Committee Chair
Library Science Department Chair
Instructional Design Review Committee Chair
Instructional Design Department Chair
Library Science Review Committee
Marketing Committee Review
Accounting, Economics, Finance Committee Review
Committees
Library Science Review Committee * agenda administrator
Instructional Design Review Committee * agenda administrator



The last section will be User Rights and will indicate some permissions you will have within the system as well as notification and signature preferences.

The first portion will be labeled “Permissions” and will be set by the administrator.

- **Can Originate Proposals** This setting indicates that you will be able to act as an originator and create new proposals.
- **Can Import** This setting allows you to import content when creating a new proposal.
- **System Administrator** This setting indicates whether you are a System Administrator. System Administrators have the highest level of authority across the Curriculog system and cannot be restricted in any way.

Permissions

- Can Originate Proposals
- Can Import
- System Administrator

The next three options will pertain to preferences regarding notifications.

- **Originator** This setting controls how often you will receive notifications for proposals you have created.
 - *Receive all messages for User's proposals* – You will receive notifications for all actions taken on proposals you originate.
 - *Receive messages for comments only for User's proposals* – You will receive notifications when there has been a comment on a proposal you originated.
 - *Receive messages for comments and edits only for User's proposals* – Users will receive notifications when there have comments or edits on a proposal they originated.
- **Email Options** Determines how often emails from Curriculog will be sent. Choosing the “All Emails” option will send an email to you each time a notification is triggered. The other options will send a digest of all notifications that occurred since the last email; and digest emails are sent out each night at midnight. As a best practice, we recommend using the digest option because Curriculog generates a lot of notifications that could quickly fill a user’s inbox if “All Emails” is chosen.

Originator	Get all messages for user's proposals
Email Options	Weekly Email Digest
Process	Send messages for the steps in which I am involved only

Note: All notifications will still appear on the User and Admin dashboards as they are triggered even if a different digest option has been chosen for the emails.

- **Process** Determines how often you will be included in notifications for proposals that you are a part of or at least one step.
 - *Send messages for the steps in which I am involved only* – be notified only for steps that you are directly a part of.
 - *Send messages for proposals in which I am involved only* – be notified for actions on all proposals you are involved in, even if you’re not involved on the current step.



The last two options indicate the preference for how the signature pin will be provided should it be required on a step, and a way for you to view your provided pin.

- **Upload paper signatures for signature steps** – The proposal will provide you a print friendly document to sign and upload to the proposal.
- **Use Electronic PINS for signature steps** – Personal identification numbers given to you to use in place of a paper-based signature; this is recommended as a best practice.

Signature Steps
Use Electronic PINS for signature steps

Signature Pin
View Pin

Note: Note all options may be available for you to modify. Your administrator may choose to override some options at the system level.

REPORTS

Global Reports

Pending Proposals Report - provides a list of all proposals within the system sorted by status.

User Activity Report - provides a detailed view of a single user's participation within Curriculog by proposal, including comments, edits, decisions and time spent.

Aging Report - provides a list of all active proposals sorted by the greatest time in the system.

Bottleneck Report - provides a list of the largest lag times for changes by user, role and entity (such as department).

Participation Report - provides a list of all steps that involve a selected participant and will include the proposal name, decision made (if any), proposal URL, and the committee/entity those proposals belong to.



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Detail Reports

Proposal Detail Report - provides the complete details of a single proposal, with the ability to include a summary of user activities (edits, comments, decisions, time), comments, import source, files and crosslistings.

Proposal Progress Report - provides the history of a proposal (its steps) in a flow diagram with user activity including comments, edits, time and decisions.

Impact Report - provides all dependent elements of the curriculum for an item, such as prerequisites, corequisites, crosslistings, programs and campuses. This will look for any reference of the course – whether it is a permalink, dynamically linked into a program, or plain text within the description.

Note: Results of the Impact Report may look surprising in how thorough they are. For example, a search for a course may provide a program in the results – even though the course does not appear to be listed in the programs description or dynamically linked at first glance, because it is listed as a prerequisite to one of the dynamically linked courses within the program!

Historical Change Report - provides the change log of all proposal versions of a curriculum item over time.

Note: There are additional reporting options available using the Curriculog Reporting API. For more information, please contact support@digarc.com.

Detail Reports
Proposal Detail Report
Proposal Progress Report
Impact Report
Historical Change Report

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HELP

In the event you need assistance, Curriculog has a built-in help available in two ways: a help form and Curriculog University.

At the very bottom of the Curriculog system, from any page, you will find two links available to you.

The first one will be “Contact System Administrator.” This will launch a short form that will direct inquires to your System Administrator and may be used for any questions regarding your use of the Curriculog system.

The second link will direct you to “Curriculog University”. Curriculog University is an online resource that allows you to quickly search through an online User Manual, Knowledge Base, Video Library, and Frequently Asked Questions section for additional information about the use of Curriculog.

You will also find information about our newly introduced Community feature, where you can engage with our other Curriculog clients to see how they've been using the system within their own Institutions.

[Contact System Administrator](#) · [Curriculog University](#)

Curriculog © 2020, [Digital Architecture](#)

Question*

Details*

Url

Name*

Email*

The screenshot shows the Curriculog University website. At the top, there's a dark blue header with the "CURRICULOG™ UNIVERSITY" logo. Below the header is a search bar with a magnifying glass icon and a green "SEARCH" button. The main content area has a white background. It features three icons: a person icon labeled "WELCOME TO CURRICULOG UNIVERSITY", a calendar icon labeled "UPCOMING QUARTERLY TRAINING", and a speech bubble icon labeled "CURRICULOG COMMUNITY". Below these are six dark blue rectangular buttons arranged in a 2x3 grid, labeled "What's New", "User Manual", "Knowledge Base" (top row) and "Events", "Videos", "Frequently Asked Questions" (bottom row).

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Glossary

Accounts Module: Module to manage user accounts and permissions. Accessing from the Administrator Dashboard provides user account management functionality allowing account creation and management of roles while access from the User Dashboard is restricted to contact information for other users and a permissions overview for the user's own account.

Administrators: System Administrators; Users who have the highest level of authority and access within the Curriculog system. A user designated as an administrator will have permissions to manage system settings and may participate in the proposals along with users.

Agendas Module: provide functionality to create a meeting agenda for discussing proposals that require a committee as a part of the approval process. A committee may be made up of several individuals which Curriculog will split into two groups: non-voting members and Agenda Administrators.

- **Agenda Administrators:** If you are designated as an Agenda Administrator, your name will appear with an asterisk beside it on the step and you will now be responsible for placing a vote on behalf of the committee and have the option for creating an agenda if one is needed. Non-voting members may place opinions on the step, but only the votes of the Agenda Administrator will be counted. There may be more than one Agenda Administrator on a step if the administrator chooses, and in that case all users designated would be required to vote for the step to advance.
- **Non-Voting Members:** Users on the proposal may edit or comment if the step allows, however rather than providing a decision you are providing an opinion. You may place the opinion to indicate your preference for an approval or a rejection, however your vote is not counted towards the final approval or rejection. Only users serving as the Agenda Administrator will have their votes counted.
- **Agendas:** Functionality to create a meeting agenda for discussing one or more proposals for a committee to review, allowing for quick decision making directly on the agenda.

Approval Process: A template of fields used to collect information from the end user, and a set of steps to drive a workflow.

- **Form:** A collection of fields used to gather proposal data from the end user.
- **Steps:** Configurable points of approval within a proposal's lifecycle. May involve committees, commenting, voting, signatures, specific deadlines and custom routing.

Approval Process Module: Approval Processes (quite commonly abbreviated to "AP") are Curriculog's core. They will dictate the fields of the form and all the steps in the workflow. In the Approval Processes Module, you will be able to manage all of the approval processes within your system.

Assessments: an optional module whose functionality is to add and manage learning objectives and expected outcomes that may be attached to course and program proposals.

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Crosslisting: functionality to allow users to establish course proposal relationships.

- **Independent:** parent and crosslisted proposals exist on their own timelines, and any decisions made to one will have NO impact on any others.
- **Dependent:** parent and crosslisted proposals wait for each other on each step until every user decides. Any decision other than approve affects ALL proposals (reject, hold, cancel, etc.).
- **Parent:** parent and crosslisted proposals are independent EXCEPT if the parent receives any decision other than approve, crosslistings will also receive the same action. However, decisions made on the crosslisted proposals do not affect the parent. If the crosslisting is further advanced than the parent, it will return to the same rejection point as the parent, and its rejection will be recorded in its status.

Cores: A combination of descriptive text and/or list of courses that may be created within programs.

Custom Text (ad-hoc text): A custom text displayed between, or next to, courses in shared cores and in program cores. This may also be called Interstitial Course Information.

Curriculog University: Online help resource available to all users through a link at the footer of every page within the system after logging in.

DataStore: Where data from the reference system is cached to allow for easy retrieval by the destination system.

Dashboard:

- **Administrator Dashboard:** The Administrative interface that provides access to system configuration and management functions. It is distinguished from My Dashboard (the primary user interface) by a thin red line above the content area. The Administrator Dashboard defaults to the Proposals Module which provides access to the following tabs:
 - **Needs Attention:** A list of items waiting for action from the Administrator.
 - **Approved:** A list of approved proposals.
 - **All Proposals:** A list of all proposals in progress.
 - **Recent Notifications:** List of notifications which consist of status updates.
 - **Upcoming Events:** Curriculum related calendar events, such as proposal deadlines, holidays and committee meetings.
- **My Dashboard:** The primary user interface that provides access to end user functions. It is distinguished from the Administrator Dashboard (the Administrative interface) by a thin blue line above the content area. My Dashboard defaults to the Proposals Module which provides access to the following:
 - **My Tasks:** A list of items waiting for action from the user.
 - **My Proposals:** A list of proposals originated by the user (unlaunched and launched).
 - **Watch List:** A list of proposals the user has elected to monitor.
 - **All Proposals:** A list of all proposals available for viewing to the user (transparency and permissions apply).
 - **My Recent Notifications:** List of notifications which consist of status updates.
 - **My Upcoming Events:** Curriculum related calendar events, such as proposal deadlines, holidays and committee meetings.

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Decision Flags: options other than approve/reject that may be allowed on steps; these decisions flags are all sent as requests to the System Administrators for approval.

- **Hold:** Users in the step will be able to continue work on the proposal, however, it will not advance in the workflow until the hold is removed by an Administrator.
- **Suspend:** No work may be done on the proposal and it will not advance in the workflow until the suspension is removed by an administrator.
- **Cancel:** The proposal will be sent back to the Originator in an unlaunched state; the Originator may then cancel and delete the proposal.
- **Custom Route:** Creates an ad-hoc step in the process to include additional participants.

Done Watching Proposal: Allows you to stop tracking the proposal and removes it from your Watch List.

Edit Mode: To make changes to an approval process, it will need to be placed in Edit Mode. While an approval process is in Edit Mode, it is not available for creating new proposals. In addition, any changes made to the approval process will only affect proposals going forward after the re-launch.

Edit Proposal : Available only if you are an active participant on the current step. Directs you to the proposal, where you may make modifications and enter your decision on this proposal depending upon your permissions.

Entity Types: Used to differentiate various types of Hierarchy items. (Example, a College could be used for 'College of Arts and Sciences' and Department could be used for the 'Art Department' as the Entity Types.)

Guests: Anyone who visits the Curriculog site but does not log in to the system. Guests are unable to make any changes to content, provide comments, or modify proposals. Guest access may be modified by the administrator.

Hierarchy: Academic organizational structure, comparable to the Acalog hierarchy.

Hierarchy Module: The Hierarchy Module allows you to manage hierarchy entities, and entity types, role types, roles, and committees associated with them.

Integration Manager: Integration Manager is a product designed by Digarc to move data between systems. Not only can it move information between Acalog and Curriculog, but it can also move information to and from an external system

Legend: Allows administrators to determine how Integration Manager will pull data out of the DataStore and into the correct fields in the destination system.

Maps: Used to instruct Integration Manager how to store data in the DataStore from a reference system.

My Settings: User settings that an individual may control relating to notifications and signatures. (*Some of these can be overridden at the administrator level*).

Notifications: E-mails sent to the user either individually or in a compiled digest depending upon settings; based upon triggers throughout the system to notify them of events that have occurred or actions that are needed.

Permissions: User accounts may be assigned specific permissions by an administrator to allow the user to access specific data in the system.

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Process Summary:

- **When viewed from proposals:** The Process Summary displays form fields (configurable), comments and approval process history.
- **When viewed from approval processes:** The Process Summary shows Process Steps.

Program Map: Available within a program proposal, this functionality allows you to compare the expected outcomes assigned to a program with the learning objectives assigned to the courses within the program to assess if the expected outcomes are being met effectively.

Proposal: Proposals are the forms that travel up the approval chain. Each proposal form has a specific approval process tied to them in a 1:1 relationship.

Proposals Module:

- **Administrator Dashboard:** The Proposals Module is where you will respond to requests within proposals, review all approved proposals to mark them ready for export, and provides a list of all active proposals.
- **User Dashboard:** Where all users will manage the proposals and interact with them throughout their workflows

Remote Authentication: commonly referred to as 'SSO' or single-sign-on. This will allow users to authenticate using credentials already established within your institution. For information on options regarding compatibility and requirements, please contact support@digarc.com

Reports: Functionality for gathering, analyzing and compiling a variety of curriculum data.

Reports Module: Allows the you to generate reports on proposal activity within Curriculog. The reports available to you are determined by the administrator.

Roles: Specific designations of role types within a hierarchy entity. (Example: Dean of the College of Arts and Sciences, Chemistry Department Chair)

Role Types: Non-specific units associated with approval steps (Example: Dean, Department Chair).

Send message about Proposal: Allows you to send a message to another Curriculog user. The e-mail will be pre-populated with a link to the proposal you were reviewing, and will allow you to include one or more users, as well as a copy to yourself. Curriculog does not store a copy of any e-mail.

Settings Module: The Settings module will contain several tabs for configuring various aspects throughout Curriculog.

Shared Core: A core created and maintained within one area of the database that may be added to any program in the system.

Signature Pin: A pin provided to the user to stand as their digital signature. The pin may be assigned by the Administrator, or permission may be granted to the user to edit their own pin.

Smartfield: A type of field within the form requiring the user to select an option from a predetermined list provided by the administrator. (Example: Prefix or Course Type)

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Steps: Configurable points of approval within a proposal's lifecycle. May involve committees, commenting, voting, signatures, specific deadlines and custom routing.

Stuck: Configurable option to set a threshold, and once a proposal has passed this threshold, it will display as "stuck" on the Administrator Dashboard as a proposal requiring attention. The system will send the administrator a notification to alert them to the new status of the item but will not take any automatic action on their behalf.

Urgency: Configurable option to set a threshold, and once this threshold is reached, the proposal will display in the "My Tasks" tab with an orange exclamation point to mark the item as "Urgent." The system will send the user a notification to alert them to the new status of the item but will not take any automatic action on their behalf.

User Tracking: Allows users to see changes that have been made to a proposal after it has been launched.

Transparency: Allows administrators to determine the tabs guests may view, the comments that will be displayed and what reports will be available to users. Transparency is controlled by the administrator.

- **Full Transparency:** Guests CAN view proposals and agendas; logged in Users CAN view proposals and agendas; System Administrators CAN view proposals and agendas.
- **Authenticated:** Guests can NOT view proposals or agendas; logged in Users CAN view proposals or agendas; System Administrators CAN view proposals and agendas.
- **Restricted:** Guests can NOT view proposals or agendas; logged in Users can only see proposals and agendas they are involved in or watching; System Administrators CAN view proposals and agendas; reports are limited to System Administrators only.

Users: Individuals granted access to the system for the purpose of directly participating in the curriculum process.

View Summary - Will create a flyout on the right pane displaying information relevant to the proposal. The same flyout will appear by clicking anywhere within the proposal's row in addition to the icon. The fields that appear in the Process Fields section will be determined by your Administrator.

Watch Proposal: Allows you to keep track of a proposal in progress by listing under the Watch List tab, even if you are not a participant on any step

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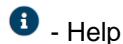
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Icon Library



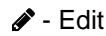
- Help



- Delete is Disabled



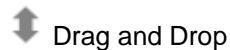
- Search



- Edit



- Launch



- Drag and Drop



- Calendar



- Delete



- Expand



- Warning

USER DASHBOARD

Proposals



- Urgent



- Send message about Proposal



- Show Edit with Markup



- Save all Changes



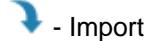
- Locked against editing



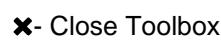
- Summary



- Watch Proposal



- Import



- Close Toolbox



- View Crosslisted Proposal



- Approved



- Held



- Cancelled



- Edit Proposal



- Done Watching Proposal



- Step Restart



- Program Map



- My Current Decision



- Rejected



- Suspended



- Multiple Decisions

Proposal Toolbox



- Discussion



- Files



- Crosslisting



- Status



- Decisions



- Signatures



- Custom Route



- Proposal Lookup

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Agendas

□- View Agenda Summary

✎ - Edit Agenda

↻- Unpublish

✓- Complete Agenda

🚀- Publish Agenda

↗ - View Agenda

─ - Archive Agenda

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