



Curriculum Management

Associate Dean Workflow

Cal Poly State University
San Luis Obispo, CA 93407

Action Taken

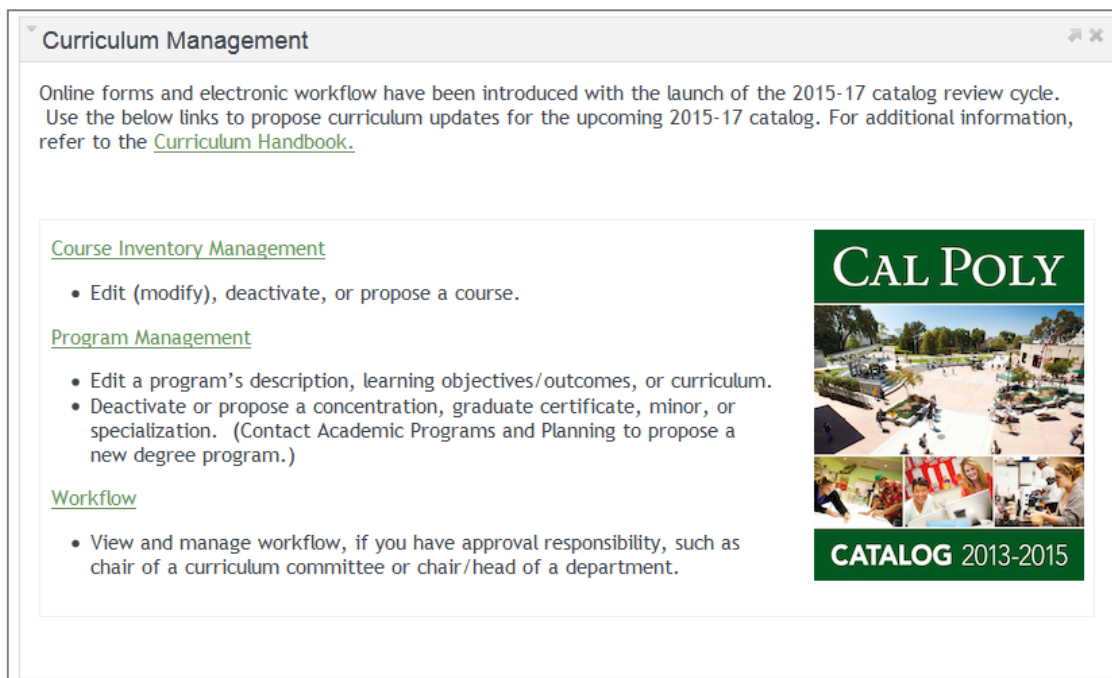
Date	Who	Action	Pages
1/22/14	Susan Olivas	Document Created	

Table of Contents

1	Overview	4
2	Receiving Notification of Workflow	5
3	Reviewing Workflow	6
4	Editing a Proposal	8
5	Approving a Proposal	8
6	Rolling Back a Proposal	9
7	Forwarding a Department's Proposal to the Office of the Registrar	11

1 Overview

For managing and publishing the catalog, the university is using a new content management system. At Cal Poly, the product has been branded as “Curriculum Management” – a portlet available on the Cal Poly portal.



- Courses are added, edited or deactivated in the Course Inventory Management tool.
- Programs (e.g. degrees, concentrations, minors, graduate certificates) are added, edited or deactivated in the Program Management tool, with the exception of adding new degree programs, which must be proposed through the Academic Programs and Planning office.

The Curriculum Management system includes electronic workflow for the catalog review cycle. When a proposer ‘saves and submits’ an online form for a course or a program, workflow is initiated. Routing of workflow is based upon an ‘Academic Org’ value, which is defined in the PeopleSoft student administration system. For example, 351-PSY2 is the Academic Org for the Psychology and Child Development department and 48-CLA is the Academic Org for the College of Liberal Arts. Subject prefixes (e.g. CD, PSY) and programs are mapped to departments and departments are mapped to colleges to facilitate workflow.

As part of workflow, the Dean’s Office must approve the following types of proposals in Curriculum Management:

- Added course (new course proposal)
- Edited course (formerly known as a course modification)
- Deactivated course
- Added program (new concentration, minor, or graduate certificate proposal)
- Edited program
- Deactivated program

2 Receiving Notification of Workflow

Once the college's curriculum committee has completed review of all of a department's proposals, the chair forwards a hard copy "cover" memo from the department chair/head with a summary of changes to the Assistant/Associate Dean of the college. This memo serves as notification that the Assistant/Associate Dean may begin their review of the department's proposals.

A sample of the memo is found in PolyLearn for the next catalog, e.g. 2015-17 Catalog Planning Phase. It includes a table summarizing courses being added, modified/edited, and deactivated. The memo also includes a narrative on any program changes.

State of California M e m o r a n d u m		CAL POLY SAN LUIS OBISPO
Date:	February 10, 2014	
To:	Susan Olivas, Associate Registrar Office of the Registrar Fred DePiero, Associate Dean College of Engineering Brian Self, Chair College Curriculum Committee	
From:	Andrew Davol, Chair Mechanical Engineering Department	
Subject:	Proposals for 2015-2017 Catalog	
<hr/>		
The Mechanical Engineering department has completed submission of its online proposals for the 2015-2017 <u>catalog</u> . Below is a summary.		
New Courses Proposed	Courses Modified or Edited	Courses Deactivated
ME 128	ME 234	ME 134
ME 129	ME 303	ME 151
ME 130	ME 326	ME 152
ME 163	ME 328	ME 236
	ME 329	ME 321
	ME 404	ME 445
	ME 501	
Changes made to the BS Mechanical Engineering curriculum (provide a brief explanation of the reasons behind any changes to each program that has been edited.)		

3 Reviewing Workflow

To review pending items in workflow, use the Curriculum Management portlet on the portal.

Step 1

In the Curriculum Management portlet in the Academics tab of the portal, select Workflow.

Curriculum Management

Online forms and electronic workflow have been introduced with the launch of the 2015-17 catalog review cycle. Use the below links to propose curriculum updates for the upcoming 2015-17 catalog. For additional information, refer to the [Curriculum Handbook](#).

[Course Inventory Management](#)

- Edit (modify), deactivate, or propose a course.

[Program Management](#)

- Edit a program's description, learning objectives/outcomes, or curriculum.
- Deactivate or propose a concentration, graduate certificate, minor, or specialization. (Contact Academic Programs and Planning to propose a new degree program.)

[Workflow](#)

- View and manage workflow, if you have approval responsibility, such as chair of a curriculum committee or chair/head of a department.

CAL POLY CATALOG 2013-2015

Step 2

The page for “Pages Pending Approval” will display. Select the “Assoc Dean” role for your college from “Your Role” pull-down menu.

COURSELEAF

Pages Pending Approval

Your Role: 48-CLA Assoc Dean

PAGE	USER
/courseadmin/2091: CD 131: Observing and Interacting with Children	FirstTest LastTest
/courseadmin/3707: HIST 300: Junior Seminar	FirstTest LastTest
/courseadmin/4094: HIST 317: The Lure of the Sea	FirstTest LastTest
/programadmin/174: HIST-MNR: History Minor	FirstTest LastTest
/courseadmin/3274: PSY 200: Special Problems for Undergraduates	FirstTest LastTest
/courseadmin/2102: PSY 323: The Helping Relationship	FirstTest LastTest
/courseadmin/3283: PSY 340: Biopsychology	FirstTest LastTest

Page Info

Title:

Last Update:

Template:

Page Authors:

Workflow:

College:

Department:

PAGE REVIEW

Hide Changes

View Changes By: All Changes

Edit

Rollback

Approve

Note: Although you may select different roles in the pull-down menu, you will only be able to Edit, Rollback, or Approve a course or program associated with your role.

In the previous example, there are seven items in workflow.

1. CD 131 proposal
2. HIST 300 proposal
3. HIST 317 proposal
4. History Minor proposal
5. PSY 200 proposal
6. PSY 323 proposal
7. PSY 340 proposal

Step 3

Select the item to be reviewed in the “Page” panel. The proposal will display below.

The screenshot displays the COURSELEAF interface. At the top, the user is logged in as 'FirstTest LastTest' with a 'Log Out' button. Below the header, a 'Pages Pending Approval' section shows a table of proposals. An orange arrow points to the row for '/programadmin/174: HIST-MNR: History Minor'. To the right, a 'Page Info' panel shows details for this proposal: Title: HIST-MNR: History Minor, Last Update: Jan 24, 2014 4:00pm, Template: cim, Page Authors: any, Workflow: College: 48-CLA, Department: History.

Below the table, the 'PAGE REVIEW' section is visible. It includes a 'Print Proposal' button, a 'Shred Proposal' button, and a 'Viewing: HIST-MNR : History Minor' status. An orange arrow points to this status. The 'Date Submitted' is 01/17/14 12:38 pm, and the 'Last edit' is 01/24/14 4:00 pm. The 'Changes proposed by' is calpoly. A section titled 'Catalog Pages Using this Program' is also present.

On the right side, an 'In Workflow' section lists the following steps:

1. 348-HIST Curr Chair
2. 348-HIST Chair
3. 48-CLA Curr Chair
4. 48-CLA Assoc Dean
5. Office of the Registrar


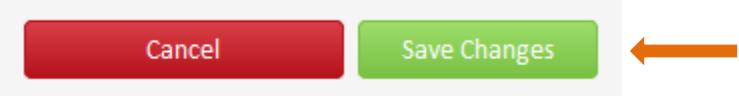
An approver in workflow has three options for proceeding:

1. Edit the proposal
2. Approve the proposal
3. Rollback the proposal with comments

The following sections outline each of these actions in further detail.

4 Editing a Proposal


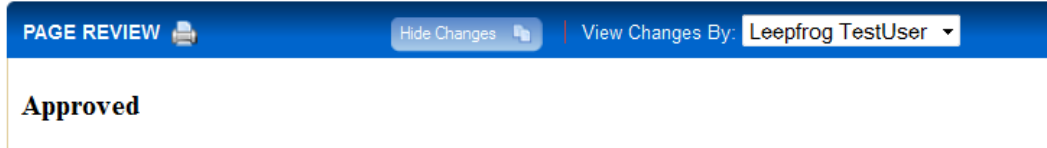
The Assistant/Associate Dean may elect to make minor edits to the proposal in order to facilitate forward progress in workflow, rather than returning the proposal for editing.

Step 1	<p>Select the Edit button in the menu bar that displays above the proposal.</p> 
Step 2	<p>In the online proposal form that opens in a new browser window, enter any edits or changes and then select the Save Changes button at the bottom of the form.</p>  <p>If no more changes are needed, proceed with approving the proposal.</p>

5 Approving a Proposal

Once an Assistant/Associate Dean approves a proposal, workflow will route the proposal to the Office of the Registrar.

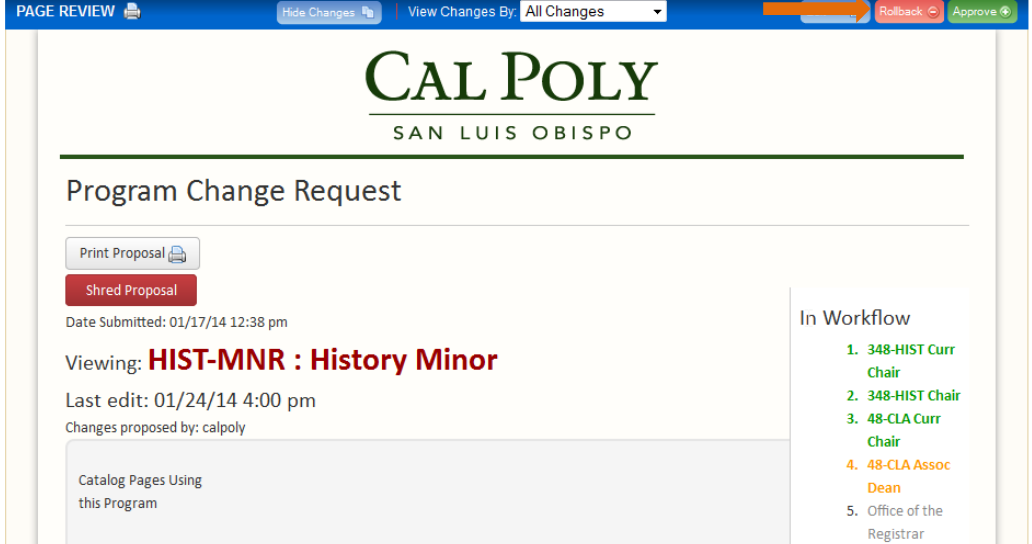
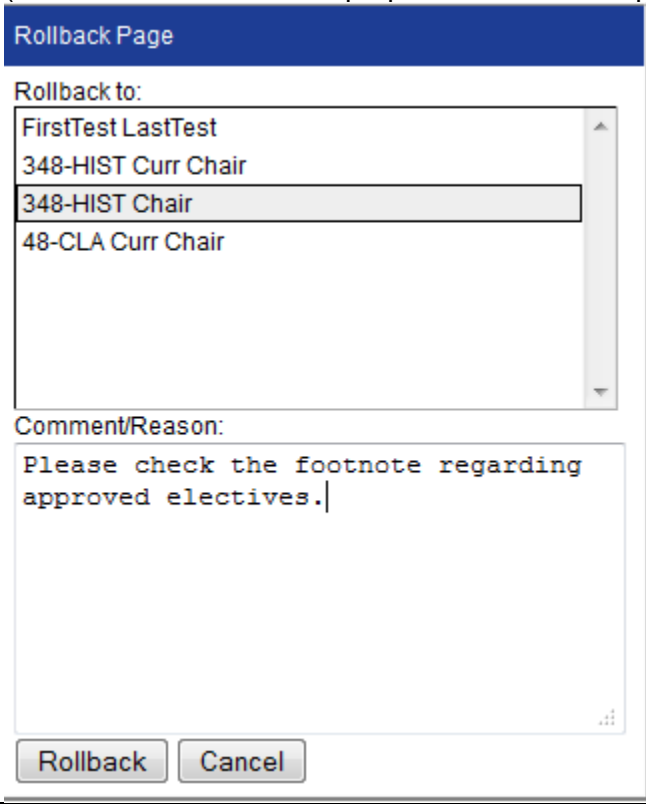
Step 1	Select the Approve button in the menu bar that displays above the proposal.
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




	
<p>Step 2</p>	<p>An “Approved” message will display and the course will no longer display in the list of pages pending approval.</p> 

6 Rolling Back a Proposal

If there are questions or significant changes to be made to the proposal, the Associate/Assistant Dean may roll back the proposal. As part of this action, the Associate/Assistant Dean may elect to return the proposal back to the proposer or to return it to the department’s curriculum committee, the department’s chair/head, or the college’s curriculum committee. The Associate/Assistant Dean also enters comments with any questions or concerns.

<p>Step 1</p>	<p>Select the Rollback button in the menu bar that displays above the proposal.</p>
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<p>Step 2</p>	<p>Select who will receive the rolled back proposal and enter comments. In the below example, the proposal is being rolled back to the chair of the History department. (FirstTest LastTest is the “proposer” in this example.)</p> 
<p>Step 3</p>	<p>Select the Rollback button.</p> <p>A “Rollback Done” message will display and the course or program will no longer display in the list of pages pending approval.</p>

	<div data-bbox="337 205 1409 247"> <div>PAGE REVIEW </div> <div>Hide Changes </div> <div>View Changes By: All Changes </div> </div> <h2 data-bbox="337 289 552 321">Rollback Done</h2> <p data-bbox="316 457 1414 552">The recipient is automatically notified by email, which includes the comments. Below is a sample email in which the proposal has been returned to the chair of the History department.</p> <div data-bbox="316 556 1425 1108"> <p> Extra line breaks in this message were removed.</p> <p>From: Catalog Editor <CalPoly@notify.courseleaf.com> Sent: Mon 1/27/2014 1:59 PM</p> <p>To: </p> <p>Cc: </p> <p>Subject: [CIM Programs] Changes Returned: HIST-MNR: History Minor</p> <div data-bbox="332 709 1414 1108">  <p>The changes that you submitted for HIST-MNR: History Minor have been returned to you: Please check the footnote regarding approved electives. [Message originally for @calpoly.edu]</p> <p>You may make further edits to the program by visiting: http://calpoly-cim.dev9.leefrog.com/courseleaf/approve/?role=348-HIST_Chair</p> <p>For questions or additional information regarding this email, please reply to this email (catalog@calpoly.edu) or contact </p> <p>Thank you.</p>  </div> </div> <p data-bbox="316 1182 1425 1276">Additionally, comments display at the bottom of a proposal, along with the username of the person who rolled back the proposal and when. (In the below example, 'calpoly' is the username.)</p> <div data-bbox="324 1291 1421 1354"> <p>Course Reviewer</p> <p>Comments: calpoly (01/27/14 1:58 pm): Rollback: Please check the footnote regarding approved electives.</p> </div>
Step 4	Note any items that are rolled back to later follow up and ensure responses are received before submitting the department's proposal to the Office of the Registrar.

7 Forwarding a Department's Proposal to the Office of the Registrar

After completing review of a department's proposals for the next catalog, forward the hard copy "cover" memo summarizing changes to the Office of the Registrar. Forwarding the memo serves as notification that the department's proposals are ready for review by the Academic Senate Curriculum Committee.

Step 1	First, verify there are no items pending review for the department by navigating to the
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Curriculum Management portlet in the Academics tab of the portal and selecting the Workflow link.

Curriculum Management

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Workflow

- View and manage workflow, if you have approval responsibility, such as chair of a curriculum committee or chair/head of a department.

Select "Refresh List" for the most current list of items pending review.

Pages Pending App

Refresh List

Your Role: 48-CLA Assoc Dean

PAGE	USER
/courseadmin/2091: CD 131: Observing and Interacting with Children	FirstTest LastTest
/courseadmin/3274: PSY 200: Special Problems for Undergraduates	FirstTest LastTest
/courseadmin/2102: PSY 323: The Helping Relationship	FirstTest LastTest
/courseadmin/3283: PSY 340: Biopsychology	FirstTest LastTest

Step 2

If any items for a department were rolled back and pending a response, follow up with the department. Remember that these items will not display again in workflow until proposals have been resubmitted and approved by the college's curriculum committee.

To check status of outstanding rolled back items, search for them in Course Inventory Management (courses) or Program Management (programs).

In the below example, CD 350 is pending approval by the chair of the Psychology and Child Development department.

- OR -

Course Code	Title	Workflow	Status
CD 350	Developmental Issues in Education	351-PSY2 Chair	edited

Date Submitted: 01/06/14 4:02 pm

Viewing: **CD 350 : Developmental Issues in Education**

Last edit: 01/06/14 5:27 pm

Changes proposed by: calpoly

Catalog Pages

In Workflow

- 351-PSY2 Curr Chair
- 351-PSY2 Chair
- 48-CLA Curr Chair
- 48-CLA Assoc Dean

Step 3

Initial next to your name in the notification memo from the department and forward the memo to the Office of the Registrar.

State of California
M e m o r a n d u m

CAL POLY
SAN LUIS OBISPO

Date: February 10, 2014

To: Susan Olivas, Associate Registrar
Office of the Registrar

→ Fred DePiero, Associate Dean
College of Engineering

Brian Self, Chair
College Curriculum Committee

From: Andrew Davol, Chair
Mechanical Engineering Department

Subject: Proposals for 2015-2017 Catalog

The Mechanical Engineering department has completed submission of its online proposals for the 2015-2017 [catalog](#). Below is a summary.

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	ME 501	

Changes made to the BS Mechanical Engineering curriculum (provide a brief explanation of the reasons behind any changes to each program that has been edited.)

--- End ---