Curriculum Management

Associate Dean Workflow
## Action Taken

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/22/14</td>
<td>Susan Olivas</td>
<td>Document Created</td>
<td></td>
</tr>
</tbody>
</table>
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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.

<table>
<thead>
<tr>
<th>New Courses Proposed</th>
<th>Courses Modified or Edited</th>
<th>Courses Deactivated</th>
</tr>
</thead>
<tbody>
<tr>
<td>ME 128</td>
<td>ME 234</td>
<td>ME 134</td>
</tr>
<tr>
<td>ME 129</td>
<td>ME 303</td>
<td>ME 151</td>
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<tr>
<td>ME 130</td>
<td>ME 326</td>
<td>ME 152</td>
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<td>ME 163</td>
<td>ME 328</td>
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<tr>
<td></td>
<td>ME 404</td>
<td>ME 445</td>
</tr>
<tr>
<td></td>
<td>ME 501</td>
<td></td>
</tr>
</tbody>
</table>
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.

Step 2

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

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.

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
Select the Edit button in the menu bar that displays above the proposal.

Step 2
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.

If no more changes are needed, proceed with approving the proposal.

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

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.

Step 1 Select the Rollback button in the menu bar that displays above the proposal.
Step 2  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.)

Rollback Page

Rollback to:
FirstTest LastTest
348-HIST Curr Chair
348-HIST Chair
48-CLA Curr Chair

Comment/Reason:
Please check the footnote regarding approved electives.

Step 3  Select the Rollback button.

A “Rollback Done” message will display and the course or program will no longer display in the list of pages pending approval.
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.

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.)

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

**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.
Step 3

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