Curriculum Management

College Curriculum Chair Workflow
## Action Taken

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/6/14</td>
<td>Susan Olivas</td>
<td>Document Created</td>
<td>24</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, chairs of college curriculum committees 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 a department has completed proposing all of their updates for the next catalog, they route a memo with a summary of changes to the chair of the college’s curriculum committee. This memo signifies that the curriculum committee may begin their review of the department’s proposals.

The template for 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. See the following sample.

State of California
Memorandum

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.

<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>
</tr>
<tr>
<td>ME 130</td>
<td>ME 326</td>
<td>ME 152</td>
</tr>
<tr>
<td>ME 163</td>
<td>ME 328</td>
<td>ME 236</td>
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<tr>
<td></td>
<td>ME 329</td>
<td>ME 321</td>
</tr>
<tr>
<td></td>
<td>ME 404</td>
<td>ME 345</td>
</tr>
<tr>
<td></td>
<td>ME 501</td>
<td></td>
</tr>
</tbody>
</table>

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.

![Workflow](image1)

**Step 2**
The page for “Pages Pending Approval” will display. Select the “Curr Chair” role for your college from “Your Role” pull-down menu.

![Pages Pending Approval](image2)

**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 four items in workflow:
1. CD 350 proposal
2. CD 431 proposal
3. PSY 431 proposal
4. Western Intellectual Tradition Minor 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 chair of the college curriculum committee 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.

![Course Inventory Change Request](image)

### 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.

![Save Changes](image)

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

---

### 5 Approving a Proposal
Once the chair of the college curriculum committee approves a proposal, workflow will route the proposal to the Assistant/Associate Dean of the college.

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

![Approve](image)
6 Rolling Back a Proposal

If there are questions or significant changes to be made to the proposal, the chair of the college curriculum committee may roll back the proposal. As part of this action, the chair may elect to return the proposal back to the proposer, to the department’s curriculum committee, or to the department’s chair/head. The college curriculum chair 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 proposer, although there are options to roll back to the department’s curriculum committee chair or to the department chair/head. (FirstTest LastTest is the “proposer” in this example.)
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.

`PAGE REVIEW   Hide Changes   View Changes By: All Changes`

**Rollback Done**

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 proposer.
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 asking the Associate Dean to review a department’s catalog proposals.

7 Facilitating Committee Review
The chair is the only member of the college’s curriculum committee who receives memo and email notifications and has access to workflow for college-level review. To review department proposals, the chair can rely on the memo to guide the committee through the changes to be reviewed. Following are suggestions on how to coordinate review with other members of the committee.

Step 1
Identify the curricular proposals to be reviewed by (1) referring to a department’s notification memo and (2) going to the Curriculum Management portlet in the Academics tab of the portal and selecting Workflow to check for proposals.
Step 2  The page for “Pages Pending Approval” will display. (If you have multiple roles in workflow, select the “Curr Chair” role for your college from “Your Role” pull-down menu. For example, if you are the chair of your department’s curriculum committee and of your college’s curriculum committee, you’ll need to select your college-based role.)

Scroll through the list of items pending approval to specifically look for college-level proposals, e.g. intradisciplinary minor, that won’t be included in any department memos.

Step 3  Based upon the courses and programs identified in a department’s memo and in the Pages Pending Approval list, formulate an agenda and share with committee members who can access proposals as follows.
Course Proposals
To review course-related proposals, a committee member
a. Selects Course Inventory Management in the Curriculum Management portlet.

b. Enters the course (e.g. CD 330) and selects the Search button. The proposal displays below for review.

Program Proposals
To review program-related proposals, a committee member
a. Selects Program Management in the Curriculum Management portlet.
b. Enters the program code (e.g. WIT-MNR) or partial program name with wildcards (e.g. "Western") and selects the Search button. The proposal displays below for review.
8 Forwarding a Department's Proposal for Dean’s Review

Once the college curriculum committee has completed review of a department’s proposals for the next catalog, the chair of the committee forwards the memo summarizing all of the changes to the Associate Dean. Forwarding the memo serves as notification that the department’s catalog proposal is ready for review by the Associate Dean.

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

```
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.
```

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 at the department level.
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 Associate Dean.
9 Preparing a College’s Catalog Proposal for Dean’s Review

Some courses and programs are interdisciplinary and are maintained by the college, instead of a department. The chair of the college curriculum committee will need to look for these proposals in their workflow page (Pages Pending Approval). Once the college curriculum committee has completed review of these proposals, the chair of the committee routes a memo summarizing the proposals. The memo serves as notification to the Associate Dean that the college’s catalog proposal is ready for review and will also be used for routing the proposal to the Office of the Registrar.

Step 1
First, verify there are no outstanding items pending review by navigating to the Curriculum Management portlet in the Academics tab of the portal and selecting the Workflow link.
Select “Refresh List” for the most current list of items pending review.

Step 2  Find a sample memo by accessing PolyLearn for 2015-2107 Catalog Planning Phase on the portal.

Step 3  Select the link for “Example of Notification Memo.”
Welcome to the 2015-17 Catalog Review Cycle

This an exciting catalog review cycle for Cal Poly because it coincides with the release of a new online Curriculum Management tool, which links directly to Cal Poly's next catalog. Curriculum Management is accessed by faculty on the Academics tab of their portal. Staff who serve on university-wide review committees may add Curriculum Management to their own portal. Please read the Curriculum Handbook in advance for information on preparing catalog proposals, using the new Curriculum Management tool, and the roles and responsibilities of the various constituencies involved in the catalog review cycle.

The PolyLearn site for the 2015-2017 catalog review cycle provides reference materials and information for catalog proposals.

In this section you will find:

- Curriculum Cycle Timeline with quarter-by-quarter activities.
- Curriculum Development and Approval chart with process flow and department, college, and committee functions.
- Checklist to assist department and college curriculum committees with curriculum review.
- Example of Notification memo to be used by a department to notify the college when they have completed submission of their online proposals for the catalog. Once the college has completed review and approval of the department's submissions, the College Curriculum Chair and Associate Dean will initial the memo and route it to the Office of the Registrar.

Step 4

Create a table summarizing new courses, edited courses, and deactivated courses proposed for the catalog. You may use Course Inventory Management to assist with creating the summary.

In the Curriculum Management portlet, select Course Inventory Management.
In Course Inventory Management, select “Added Courses” in the Quick Searches field. Scroll through the results, which are listed alphabetically by subject area, to identify new courses proposed by your department.

*Note* There may be ‘Edited’ courses displaying in search results for Added courses. In these cases, a new cross-listing has been added to an existing course, which then creates an edit to the crosslisted course.

Select “Edited Courses” in the Quick Searches field. Scroll through the results, which are listed alphabetically by subject area, to identify courses modified/edited by your department.
Select “Deactivated Courses” in the Quick Searches field. Note that search results will include courses deactivated in recent catalogs, which prevents the re-use of recently deactivated catalog numbers. To identify courses proposed for deactivation in the next catalog, select the Workflow column heading twice to sort deactivated courses by workflow in descending order. Courses proposed for deactivation in the next catalog, will have a value in the Workflow column.

Step 5
At the end of the memo, provide a narrative on any programs that have been added, edited, or deactivated. You may use Program Management to assist with creating the narrative.

In the Curriculum Management portlet, select Program Management.

In Program Management, select “Added Programs” in the Quick Searches field. Scroll through the results to identify new programs proposed by your department.
In the Quick Searches field, select “Edited Programs” and “Deactivated Programs” to identify those program proposals.

**Step 6**  
Address the memo to the Associate Dean and the Office of the Registrar.

**Step 7**  
Route the memo to the Associate Dean, so they may begin their review of the college’s catalog proposal.

--- End ---