Department Chair/Head Workflow
## Action Taken

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/3/14</td>
<td>Susan Olivas</td>
<td>Document Created</td>
<td>17</td>
</tr>
</tbody>
</table>
# 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 ............................................................................................................................ 9
6. Rolling Back a Proposal ....................................................................................................................... 10
7. Preparing the Department’s Catalog Proposal for College Review .................................................... 12
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, department chairs/heads 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

**Step 1**
When a proposer submits an online curricular proposal (e.g., new course, edited program), workflow is initiated. A department chair/head receives notification from “Catalog Editor” in an email automatically generated through the content management system when the proposal is ready for their review.

Note: If the department has a curriculum committee, the department chair/head will not receive notification until the proposal has been approved by the committee.

Following is an example of an email routed to the chair of the Psychology and Child Development department.

```
Extra line breaks in this message were removed.

From: Catalog Editor <CalPolynotify.coursesdept.com>
To: [Redacted]
Cc: 
Subject: [CIM Courses] Review Request: 351-PSY2 Chair

There are pending course change proposals awaiting your review, including PSY 417: Interpersonal Relationships in Childhood and Adolescence.
Please visit:
http://calpoly-cim.dev9.learnpod.com/courseleaf/approve/?role=351-PSY2_Chair
to review the changes and provide your feedback.

For questions or information regarding this email, please reply to this email (catalog@calpoly.edu) or contact [Redacted].

[Message originally for [Redacted]@calpoly.edu]

Thank you.

[Email signature]
```

The email identifies the course or program with a proposal pending review. In the above example, the course is PSY 417: Interpersonal Relationships in Childhood and Adolescence.

**Step 2**
Select the link in the email to view the online proposal.

The page for “Pages Pending Approval” will display. Select the course or program in the list and the proposal will display below.
3 Reviewing Workflow

Another option for reviewing workflow is to access it through 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 “Chair” role for your department 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 above example, there are two items in workflow.
1. PSY 417 proposal
2. PSY 500 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 to the proposer

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

## 4 Editing a Proposal

The department chair/head 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 a department chair/head approves a proposal, workflow will route the proposal to the chair of the college curriculum committee.

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 department chair/head may roll back the proposal. As part of this action, the chair/head may elect to return the proposal back to the proposer or to return it to the department’s curriculum committee. The chair/head 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 department’s curriculum committee. (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.
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 Psychology and Child Development department’s curriculum committee.

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.)

7 Preparing the Department’s Catalog Proposal for College Review
Once the department chair/head has completed approvals of changes and additions to courses and programs for the next catalog, they route a memo summarizing all of the changes. The memo serves as notification to the chair of the college’s curriculum committee that the department’s catalog proposal is ready for review and will also be used for routing the proposal to the Associate Dean and then 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
Select “Refresh List” for the most current list of items pending review.

If your department has a curriculum committee, ask the chair of the committee to also verify that there are no pending items in their workflow.

**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 within the Added courses dropdown menu because a crosslisted course 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.

![Image of course list]

**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.

![Image of curriculum 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.

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Title</th>
<th>Work/Year</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Soil and Land Resources</td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>Geospatial Technologies</td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>Gender, Race, Culture, Science and Technology minor</td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>Hydrology</td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>Integrated Marketing Communications</td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td>AGED-MNR</td>
<td>Agricultural Education Minor</td>
<td></td>
<td>Added</td>
</tr>
</tbody>
</table>

**Step 6**  
Address the memo to the Office of the Registrar, the Associate Dean, and the Chair of the College Curriculum Committee.

**Step 7**  
Route the memo to the Chair of the College Curriculum Committee, so the committee is notified that they may begin their review of the department’s catalog proposal.

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