Curriculum Management

Department 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>1/2/14</td>
<td>Susan Olivas</td>
<td>Document Created</td>
<td>15</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 .................................................................................................................... 11
7 Facilitating Committee 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, chairs of department 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

Step 1  When a proposer submits an online curricular proposal for a department (e.g. new course, edited program), workflow is initiated. Immediately, the chair of the department’s curriculum committee receives notification from “Catalog Editor” in an email automatically generated through the content management system.

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

![Email example]

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

For department curriculum committee meetings, the chair can view items pending review by selecting the Workflow link in 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 “Curr 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 course proposal
2. MS Psychology 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. Roll back the proposal with comments to the proposer

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

4 Editing a Proposal

The chair of the department’s curriculum committee may make minor edits to the proposal on behalf of the committee in order to facilitate forward progress in workflow, rather than returning the proposal to the proposer 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

The chair of the department's curriculum committee may approve the proposal on behalf of the committee. Approval will route the proposal to the department chair/head for review and approval.

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.

An email notification to the chair or head of the department is automatically sent.

There are pending course change proposals awaiting your review, including PSY 417: Interpersonal Relationships in Childhood and Adolescence. Please visit [http://calpoly-cim-dev9.leepfrog.com/courseleaf/approve?trole=351-PSY2_Chair](http://calpoly-cim-dev9.leepfrog.com/courseleaf/approve?trole=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 Shayna Bailey (805-756-2227).

[Message originally from catalog@calpoly.edu]

Thank you.

-- CourseLeaf
6 Rolling Back a Proposal

If there are questions or significant changes to be made to the proposal, the chair of the department’s curriculum committee may roll back the proposal to the proposer on behalf of the committee. As part of this action, the chair enters comments with any questions or concerns to the proposer. Rolling back a proposal gives the proposer an opportunity to make changes and restarts the workflow process from the beginning after the proposal has been resubmitted.

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

Step 2
Enter comments in the window that displays.
Step 3  
Select the Rollback button to return the proposal with comments to the proposer. The proposer is automatically notified by email, which includes the comments. Below is a sample email.

```
To: [Contact Information]

Subject: [CIM Courses] Changes Returned: PSY 417: Interpersonal Relationships in Childhood and Adolescence

The changes that you submitted for PSY 417: Interpersonal Relationships in Childhood and Adolescence have been returned to you:

Please provide more detail when explaining the need for this course. Also, provide higher level course learning objectives to better align with the upper-division nature of this course. [Message originally for [username]@calpoly.edu]

You may make further edits to the course by visiting:

For questions or additional information regarding this email, please reply to this email (catalog@calpoly.edu) or contact Shayna Bailey (805-756-2227).

Thank you.
-- CourseLeaf
```

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.)

<table>
<thead>
<tr>
<th>Course Reviewer</th>
<th>calpoly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Fri, 03 Jan 2014 02:44:19 GMT</td>
</tr>
</tbody>
</table>

7  Facilitating Committee Review
The chair is the only member of the department’s curriculum committee who receives email notifications and has access to workflow for that level of review. Following are suggestions on how to coordinate review with other members of the committee.

Step 1  
Identify the curricular proposals to be reviewed by going to the Curriculum Management portlet in the Academics tab of the portal and selecting Workflow.
Step 2  The page for “Pages Pending Approval” will display. (If you have multiple roles in workflow, select the “Curr Chair” role for your department 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 department-based role.)

Pages Pending Approval

/courseadmin/2106: CD 330: Supervised Fieldwork Internship
/courseadmin/2085: CD 350: Developmental Issues in Education
/courseadmin/4119: CD 431: Assessing Children's Development and Environments
/courseadmin/4121: CD 432: Advanced Research Internship
/courseadmin/2096: PSY 256: Developmental Psychology
/courseadmin/4120: PSY 431: Assessing Children's Development and Environments
/programadmin/47: PSY-MS: MS Psychology

Step 3  Based upon the courses and programs displaying 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. PSY-MS) or partial program name with wildcards (e.g. "Psychology") and select the Search button. The proposal displays below for review.