Version

1.0

UNIVERSITY of HOUSTON

RAR Catalog and Curriculum Management

curriculog™
Curriculum Management

Curriculog Guide
Proposals

CATALOG AND CURRICULUM MANAGEMENT

Curriculog Guide - Proposals

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http://www.uh.edu/about/offices/enrollment-services/registrar/catalog-curriculum-management/

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Curriculog

Curriculog is a workflow, collaboration, and approval-tracking platform with the flexibility to respond to evolving institutional and accreditation requirements. Adopted in 2014, the online system will replace the paper versions of Coordinating Board Management (CBM) forms and other methods of proposing and approving changes to courses, programs, policies, and catalog text.

Features

Curriculog creates the ability to:

- Communicate changes to university curriculum to entire community.
- Provide historical logging of comments and voting at each level of approval
- Help users understand impacts of change for other courses and programs that may depend on other courses (prerequisites, Core, plan-required courses).
- Track in real time the progress of proposals
- Develop agendas and meet virtually (via voting and comment logging) or in-person to discuss proposals.
  - Smart phone, IPad, and laptop users can also enter comments and cast votes/make decisions.
- Interface with other UH systems (PeopleSoft and Acalog (catalog)) in order to reduce duplication of effort and opportunity for manual entry errors when inputting approved changes into the external systems.

Training

Training information is located on the RAR – Catalog and Curriculum Management website: http://www.uh.edu/about/offices/enrollment-services/registrar/catalog-curriculum-management/

Accessing Curriculog

URL

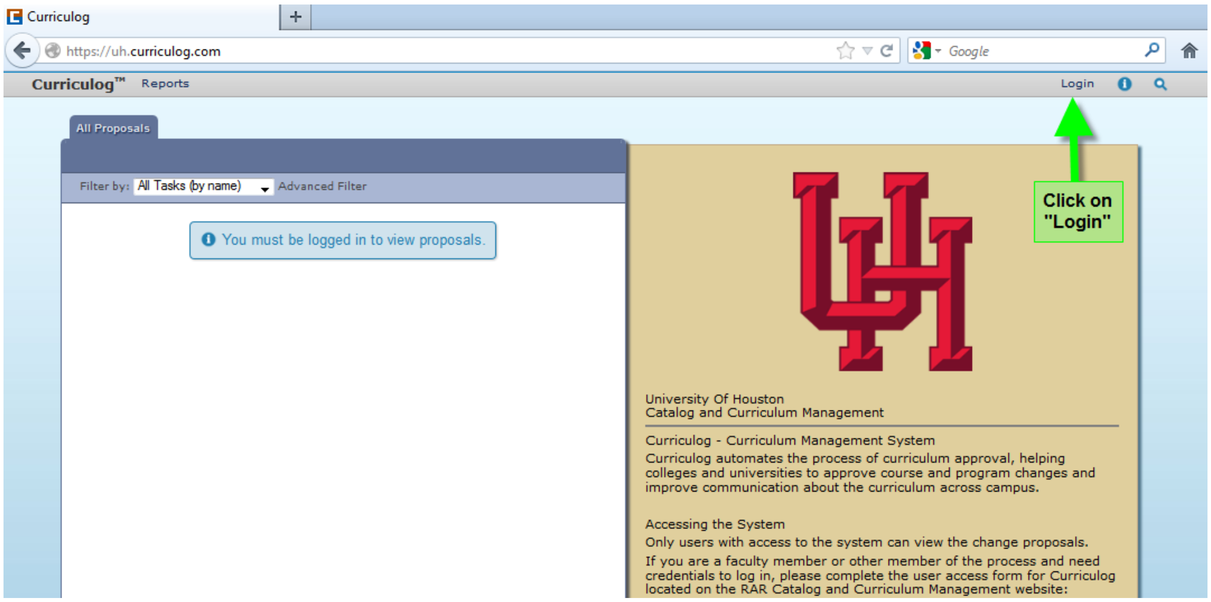
- https://uh.curriculog.com

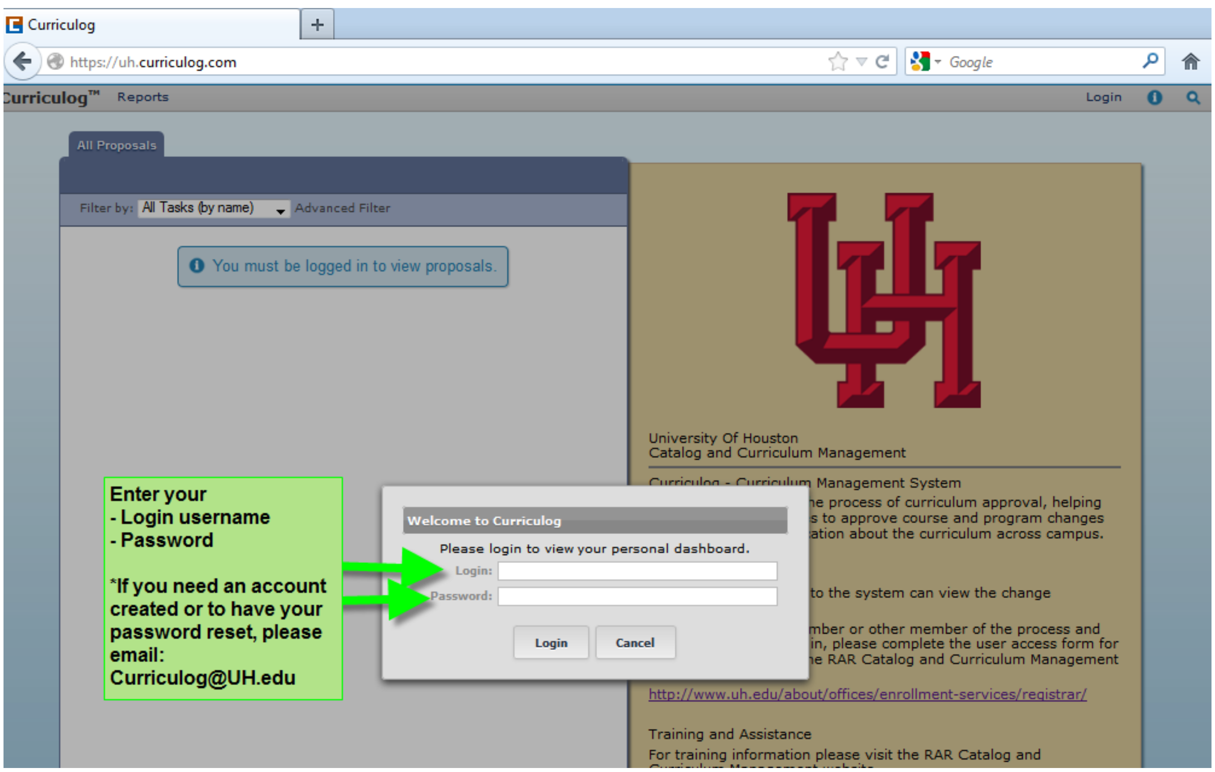
Credentials

- Who has access?
  - All faculty and the staff that need to support the proposal process will have access to Curriculog.
- Username and password
  - Initial username and password will be emailed directly to the individual.
- Login support
  - Forgot Password
    - Please email Curriculog@uh.edu for password reset. UHIT cannot reset this password for you.
  - No Account
    - If you do not have an account in Curriculog, please complete the form located on the Catalog and Curriculum Management website to have an account created for you. http://www.uh.edu/about/offices/enrollment-services/registrar/catalog-curriculum-management/

Login

1st. Go to https://uh.curriculog.com

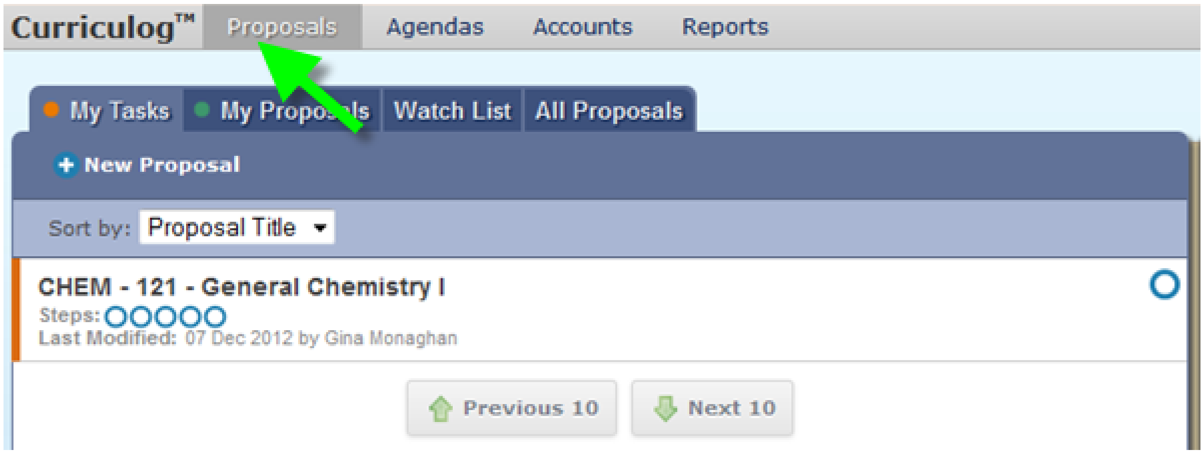
2nd. 

3rd. 

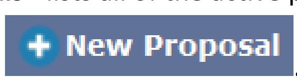
Proposals Tab

Proposals are the forms that travel up the approval chain. Each proposal form has a specific approval process tied to it in a 1:1 relationship. Selecting the Proposals Module from the top navigational menu will populate the left pane with options relevant to managing proposals.

From the Proposal Module in the top navigation, you will now have access to the My Tasks, My Proposals, Watch List, and All Proposals tabs.



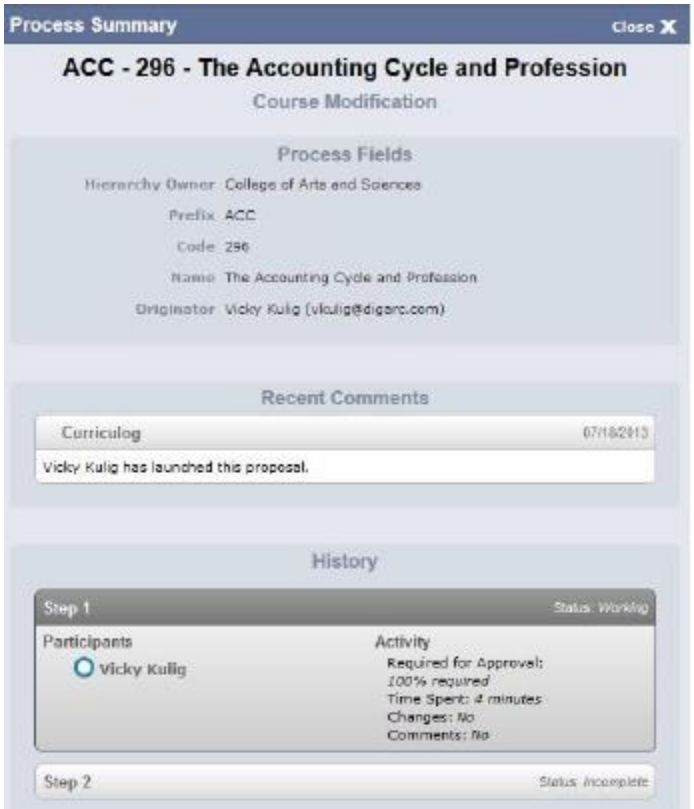
- **My Tasks** - lists all proposals assigned to you and awaiting action.
- **My Proposals** - lists all proposals you have created, whether they have been launched or not.
- **Watch List** - lists all proposals you have selected to watch. You may or may not have editing permissions or decision making abilities on an item you are watching, as you are able to watch any proposal in progress. You may choose to stop watching a proposal at any time.
- **All Proposals** - lists all of the active proposals in Curriculog.

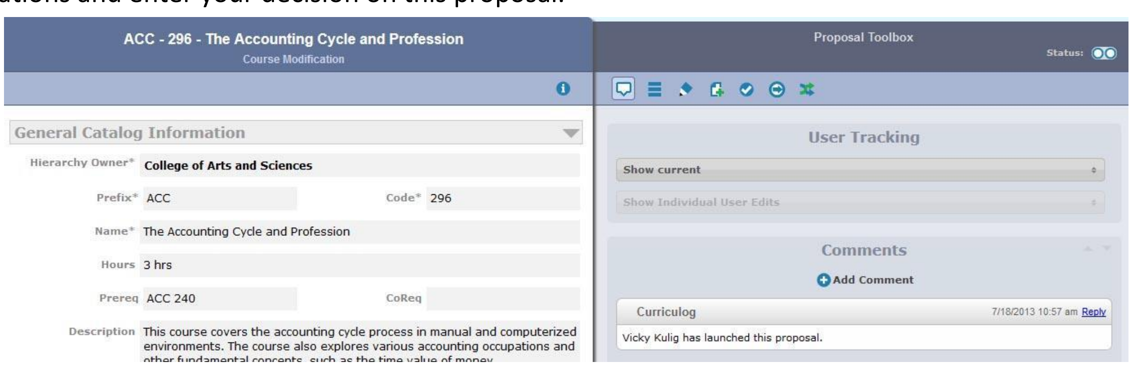
Below these tabs is 

. Selecting New Proposal will open the workflow to create a new proposal. The New Proposal section is explained in below.

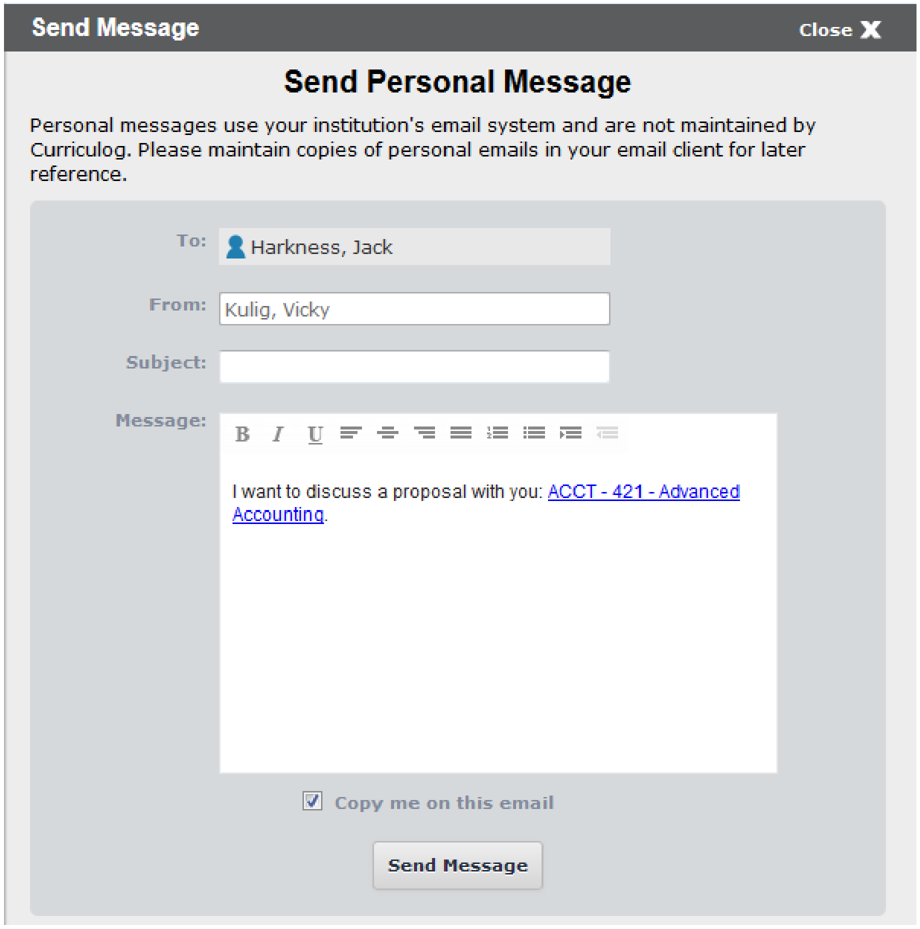
There are various icons and colors associated with the proposals.
The thin colored bar that appears to the left of the proposal will change based on the relationship with the user.

- **Blue** - No action currently required.
- **Green** - A proposal created by you.
- **Orange** - Waiting on action from you.

- **Urgent** - Indicates a task is urgent. An item will be considered urgent once the urgency threshold has been met, which is set by an Administrator.
-  **View Summary** - Will create a flyout on the right pane displaying information relevant to the proposal.
  - 

  -  **Edit Proposal** – If this is your proposal or if you have an action to make on the proposal, this icon will appear. If clicked, you will be directed to the Proposal Toolbox, where you may make modifications and enter your decision on this proposal.
    - 

- **Send message about Proposal** - Emails are not maintained within Curriculog.

- **Watch Proposal** - Allows you to keep track of a proposal in progress by listing under the Watch List tab.

- **Done Watching Proposal** - Allows you to stop tracking the Proposal.

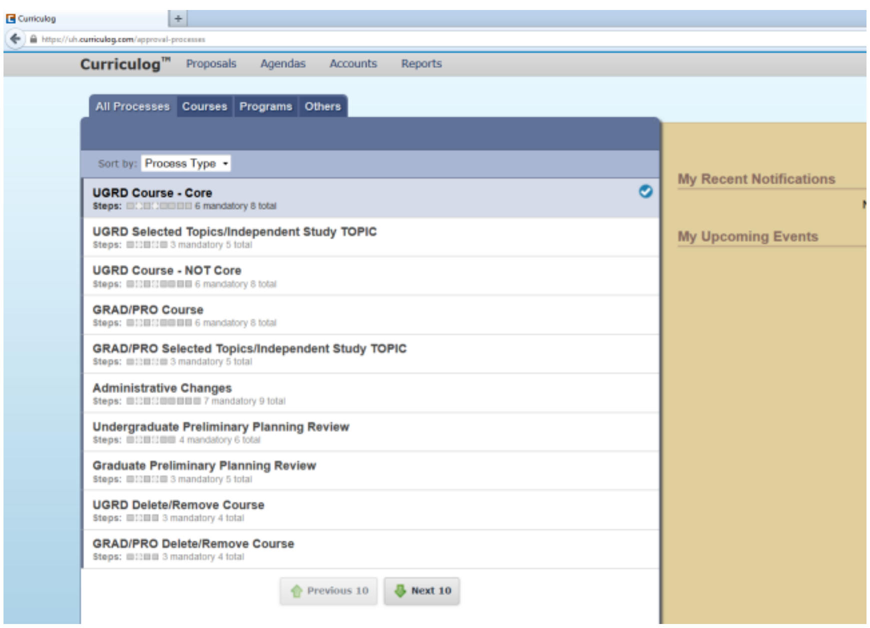
- **My current decision** - This icon will change based on what decision you have made on the Proposal. You can click the help icon for a key to what the different decision icons mean.
- **Delete a Proposal** - Deleting a proposal will permanently remove it from Curriculog. Proposals cannot be deleted after they have been launched.

Create a NEW Proposal

Selecting **+ New Proposal** allows you to create a new proposal. Please note that before a new proposal can be created, an Approval Process must be created by an Administrator. There are four tabs available for listing the approval processes you may choose from to create a new proposal:

- **All Processes** - Lists all approval processes available for use.
- **Courses** - Approval processes created pertaining to courses.
- **Programs** - Approval processes created pertaining to degree plans.
- **Others** - Approval processes created pertaining to other actions, such as administrative actions, policy changes, catalog narrative text, and to delete courses.

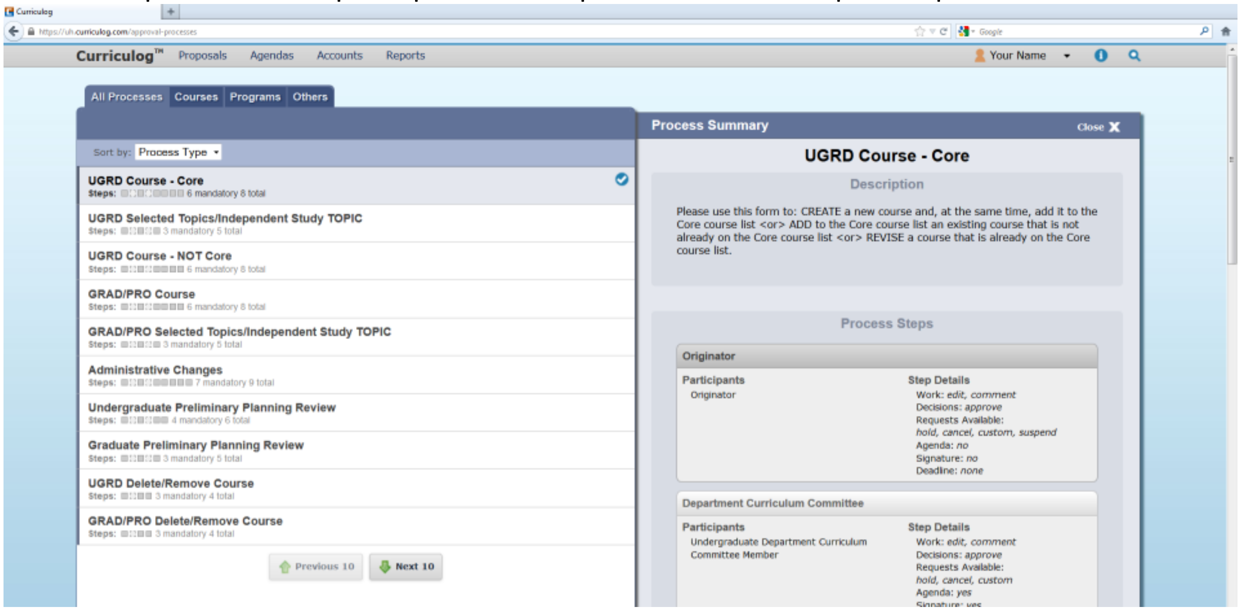
Each tab will display ten rows with “Previous 10” and “Next 10” buttons available for navigating when there are multiple pages. A Sort by: drop-down menu is available for sorting the processes by Process Type or Process Title. Each process row will display the name of the approval process, the number of steps involved in the process and a blue checkmark.



SUMMARY OF PROPOSAL CREATION STEPS

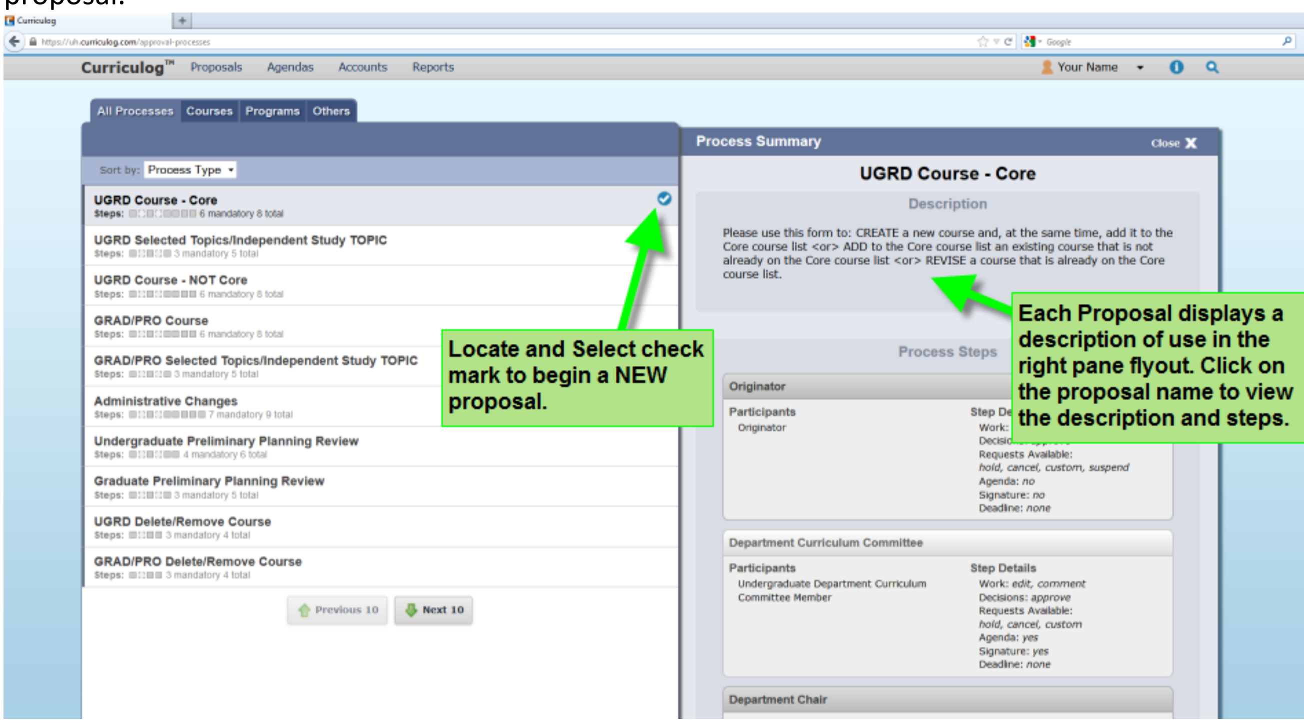
1. Find and select appropriate proposal for the change you need to submit.
2. For changes to EXISTING catalog information:
   a. Import the existing catalog information (in some cases you will copy-paste the information into the appropriate fields) but DO NOT MAKE CHANGES NOW.
   b. Complete any other required fields.
   c. LAUNCH proposal.
   d. You will be the first step in the proposal approval process. Once launched, make the necessary changes to the existing information, so that the changes can be easily seen and tracked.
   e. Enter any additional comments (if necessary)
   f. Make your decision to send the proposal to the next step in the approval process.
3. For NEW content:
   a. Complete all necessary and required fields.
   b. LAUNCH proposal.
   c. You will be the first step in the proposal approval process. Once launched, you can make any necessary changes to the existing information.
   d. Enter any additional comments (if necessary)
   e. Make your decision to send the proposal to the next step in the approval process.

Clicking on a process row will display the Process Summary flyout over the right pane. This will display the Process Steps with a list of participants and step details for each step in the process:



Start a proposal,

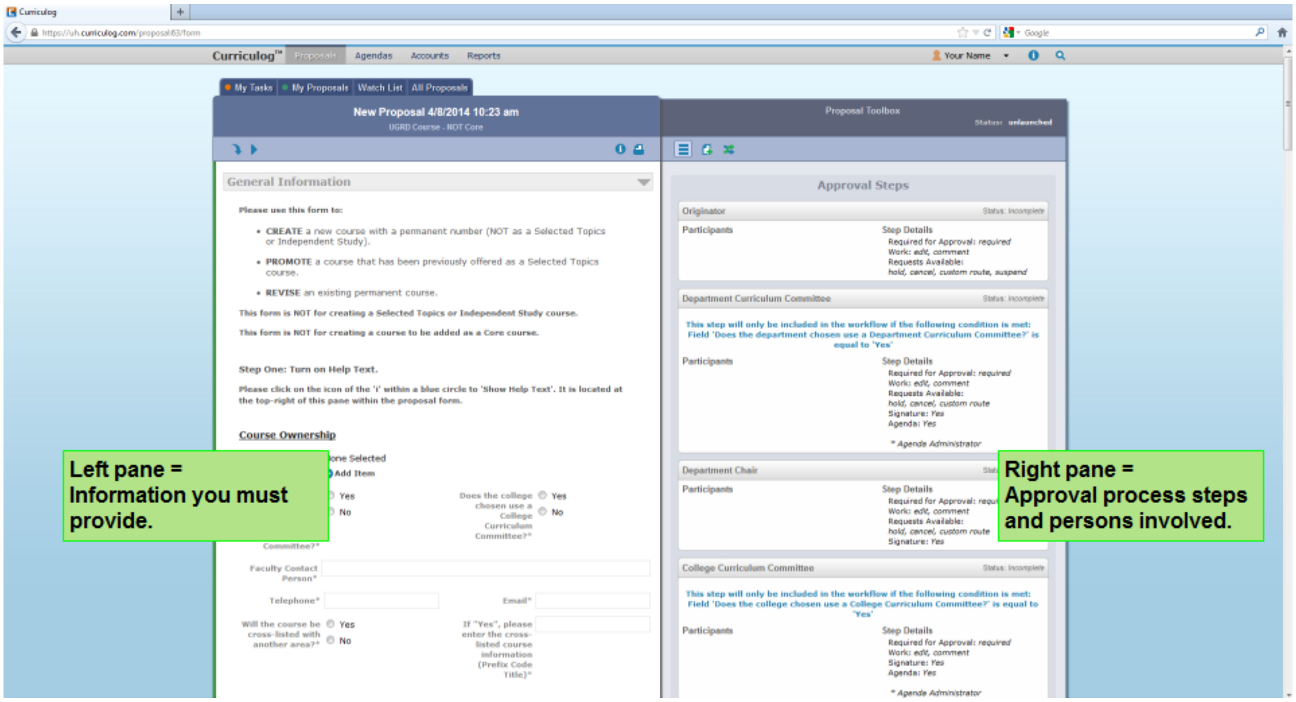
- Locate the approval process you would like to use and select the blue checkmark to start the proposal.



This will launch the Proposal Toolbox, allowing you to complete the appropriate fields to propose an item based on the approval process selected. The proposal form will vary greatly depending on the customization applied to the approval process by the Administrator.

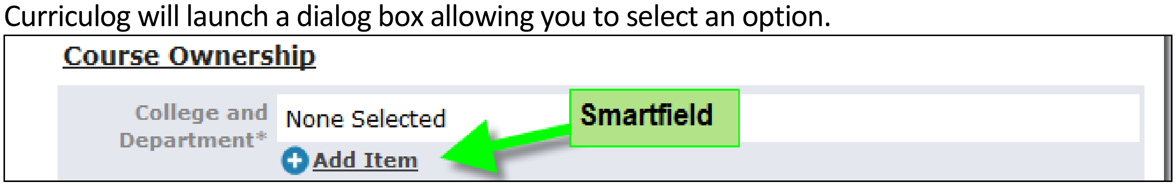
General Field Type Instructions

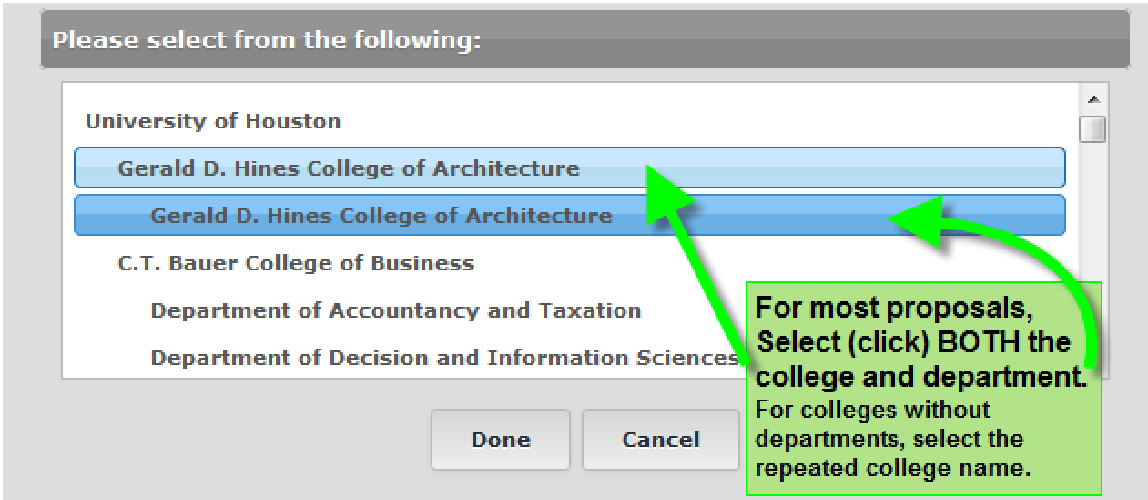
- Note: the instructions below are as example to familiarize you with the function of Curriculog, not as specific instruction for the proposals, however, the workflow is consistent within other proposal forms. Instructions per form are included as Help text with each proposal form
- A course proposal will include Prefix, Code, Name, and Hierarchy Owner as the default fields while
- A program proposal will include Hierarchy Owner, Title, Prospective Curriculum, and Expected Outcomes.



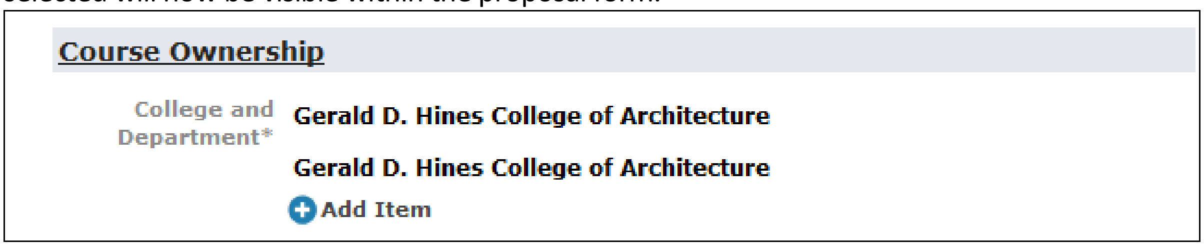
- Required Fields
  Fields denoted with an asterisk, such as the Hierarchy or Program Type, are required in order to launch a Proposal.

- Smartfields
  Items listed with a blue plus symbol and “Add Item” are Smartfields. When you select a Smartfield, Curriculog will launch a dialog box allowing you to select an option.

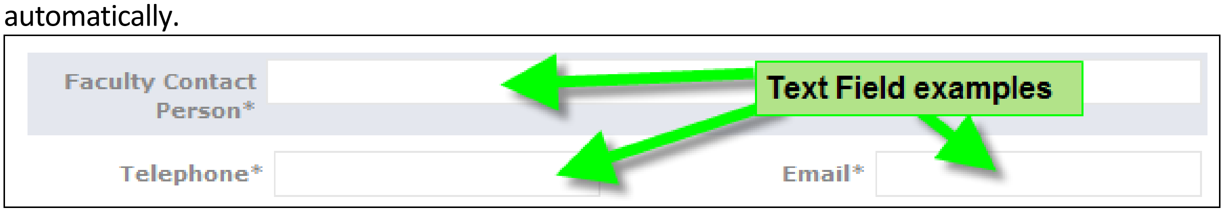




When you select an item(s), it will be highlighted blue and you will click "Done". The item(s) selected will now be visible within the proposal form.

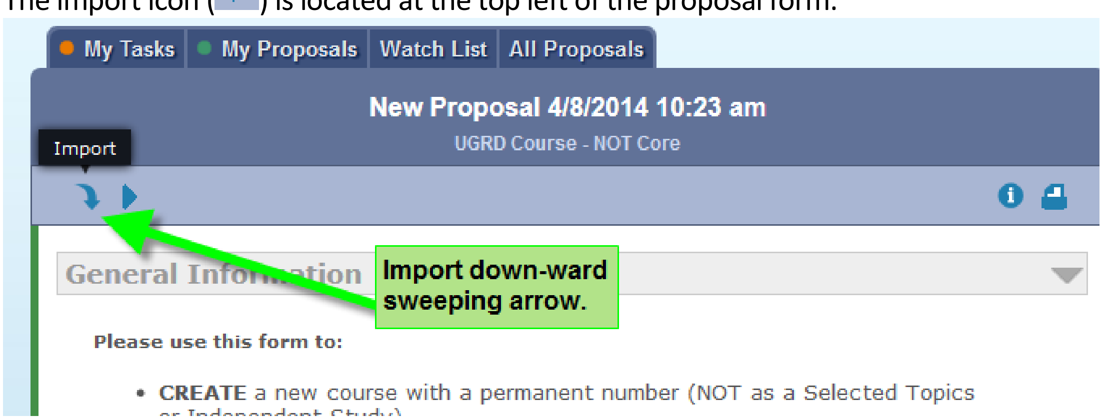


- Text Fields
  Text fields simply require you to insert text. When you click outside of the field, the text will save automatically.



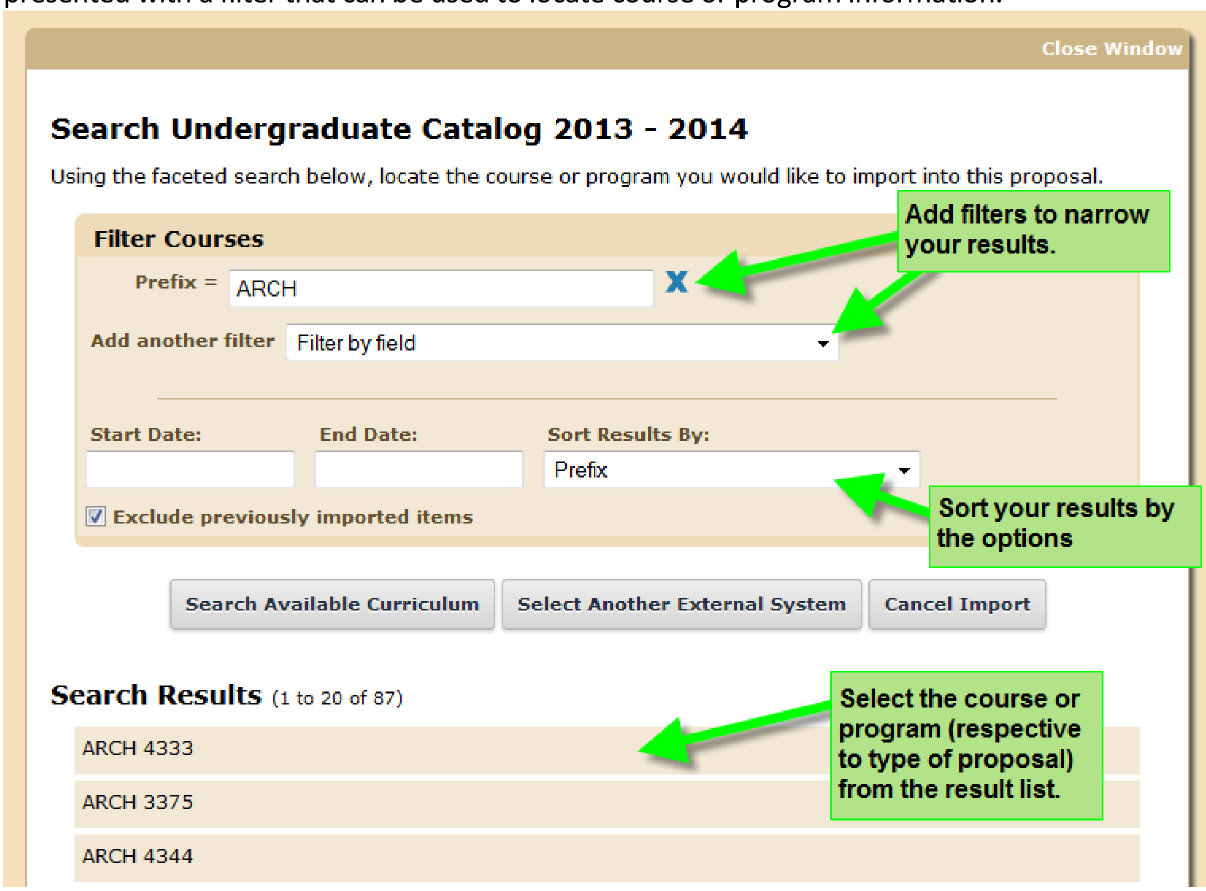
- Import Data Into Proposal
  In addition to building a new program from the ground up, you can also import programs from the current UH Academic Catalog.

  The import icon ( ) is located at the top left of the proposal form.

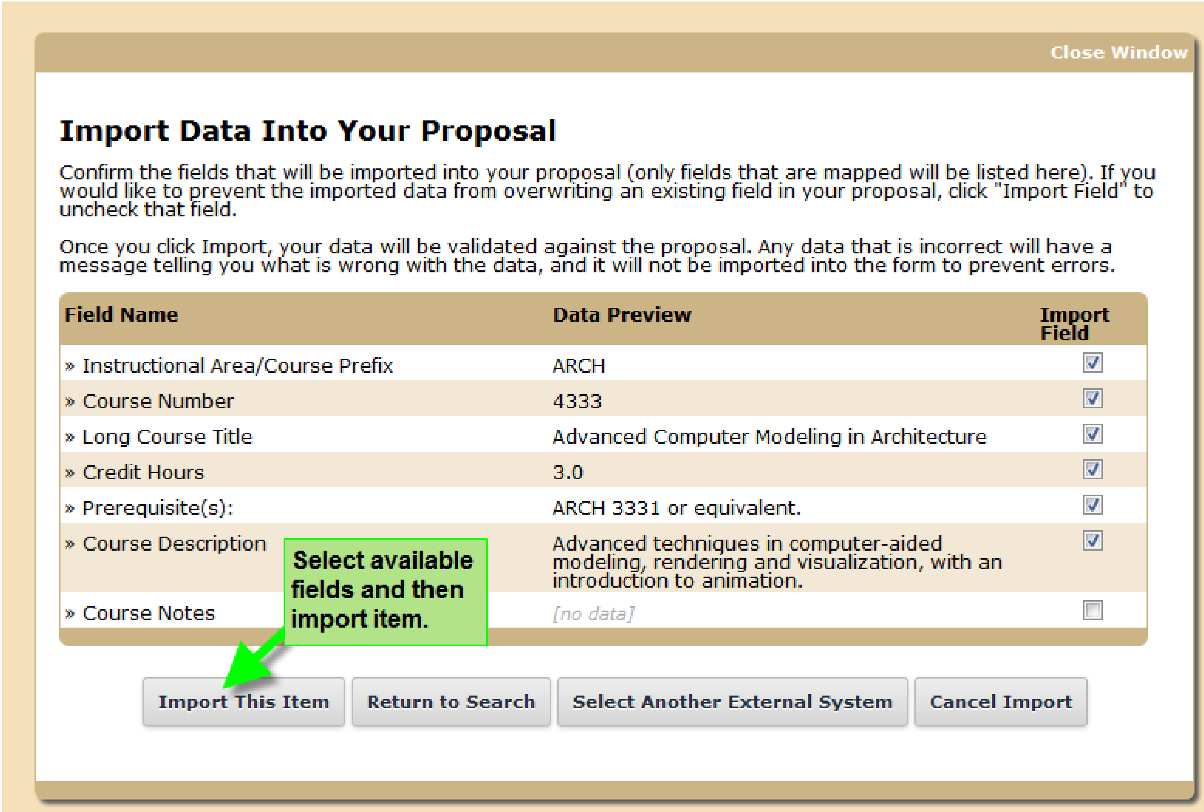


A new window will appear featuring the Integration Manager, which can be used to pull program information from an external system.

Select the external system (the appropriate catalog) you would like to import from, and you will be presented with a filter that can be used to locate course or program information.



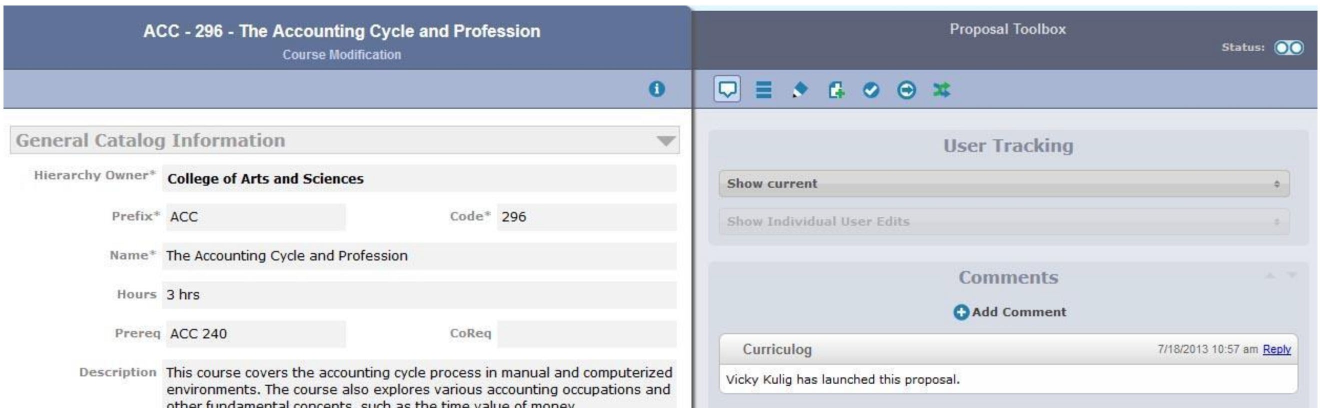
Select the information you wish to Import, and the Integration Manager will display the fields being imported.



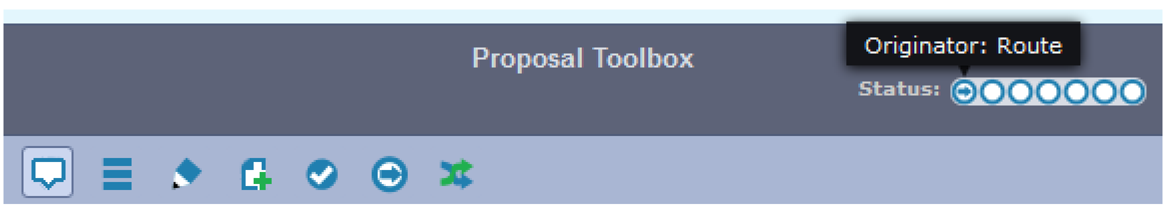
Choosing ‘Import This Item’ will import the program information into your proposal.

Make a Decision

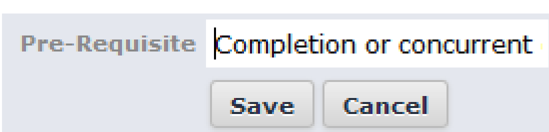
Proposals awaiting a decision from you will be listed in the My Tasks tab of the Proposals Module. This tab will display by default when logging into Curriculog. To make a decision select the Edit Proposal icon . The proposal form will display allowing you to see the proposal form, User Tracking and Comments within the Proposal Toolbox.



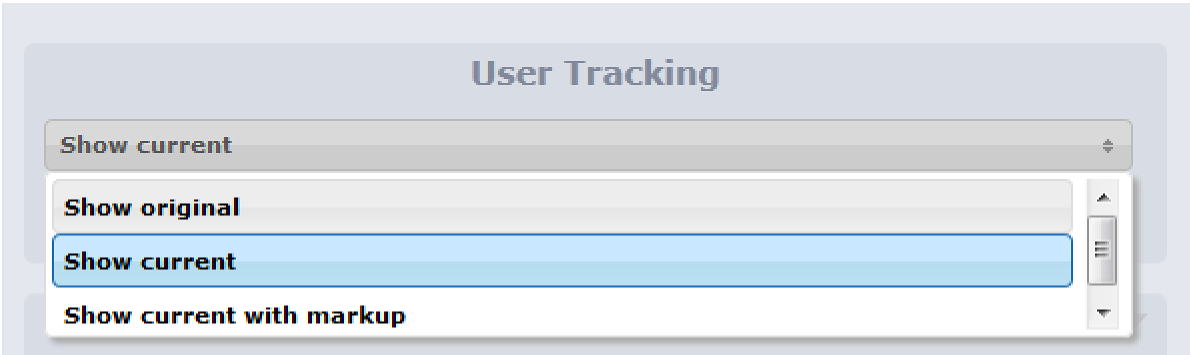
You may view the status of each step within the proposal by hovering over the Status icons in the upper right of the Proposal Toolbox. Each circle indicates a step in the proposal. Hovering over a circle indicates the name of the step and the decision made on that step.



You may edit information in the proposal if you have been granted edit rights by the Administrator. Simply click in the field of the proposal form on the left that you would like to edit, make your modifications and select “Save”. If you click in a field and the workflow does not display, you do not have rights to edit the proposal. You must contact an Administrator to request edit rights.

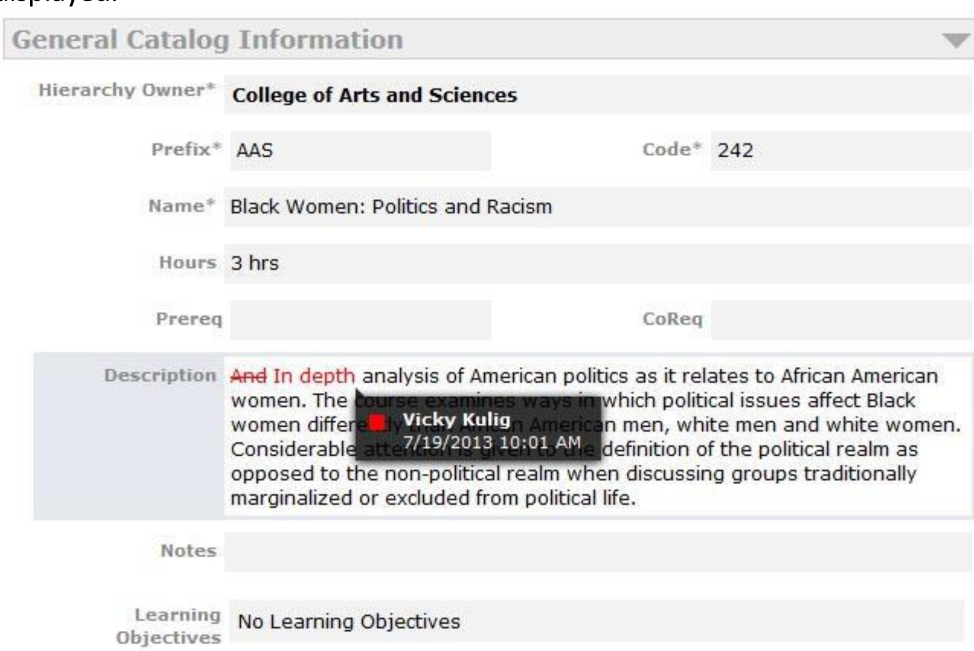


User tracking options allow you to view changes made by others within the proposal. There are three options available in the drop down menu. User tracking is available within fields determined by the Administrator within the approval process.

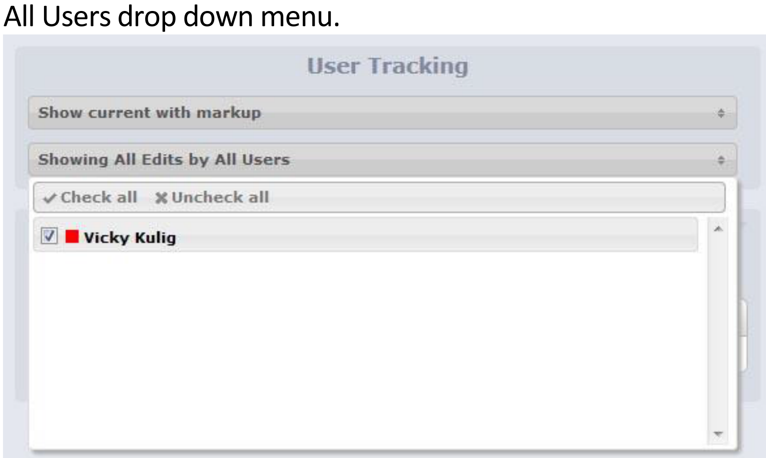


- Show current (default) displays the proposal in its current state.
- Show original displays the proposal in its state at launch.
- Show current with markup allows you to see the changes made, who made those changes as well as the date and time of the change.

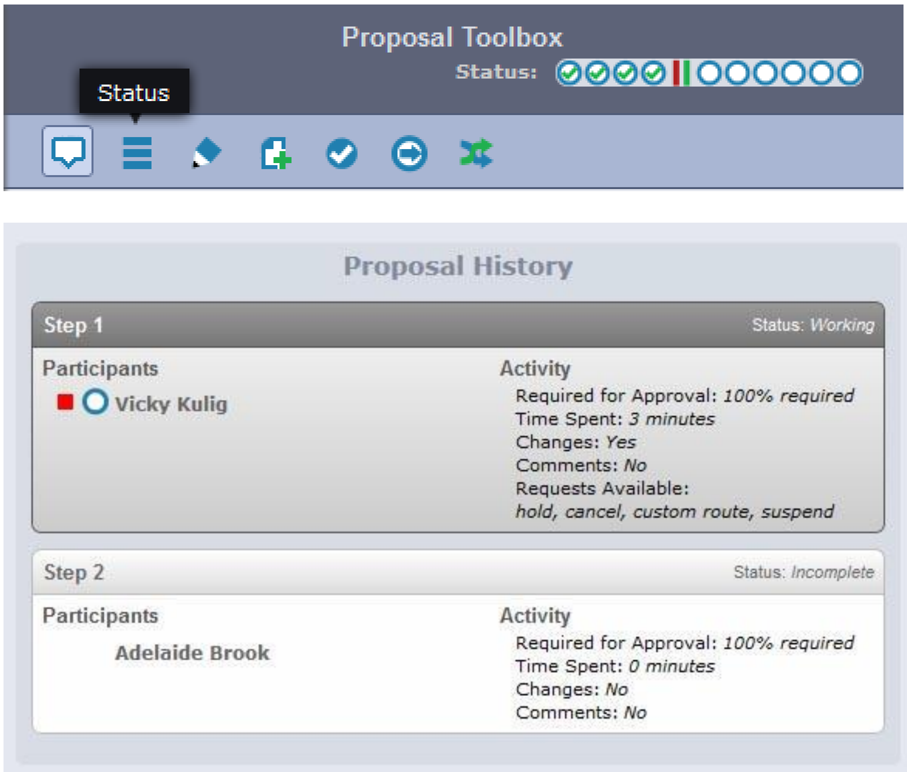
Additionally, each user is assigned a color within Curriculog to easily distinguish who made the edits displayed.



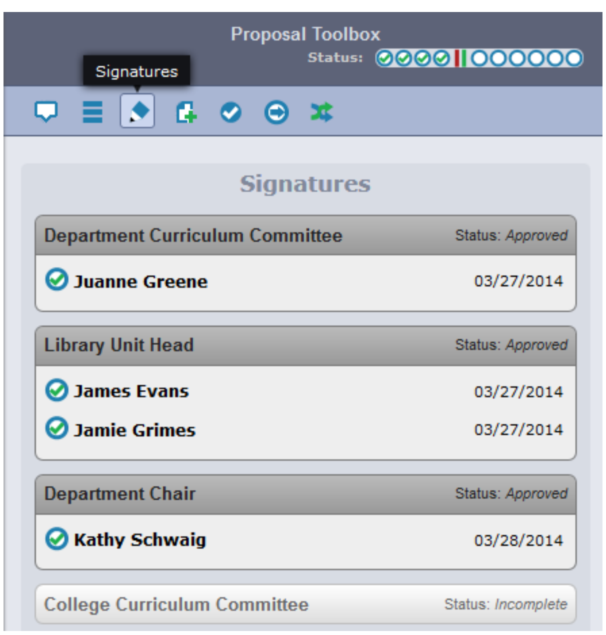
You may select to view changes made by a specific user or a number of users from the Showing All Edits by All Users drop down menu.



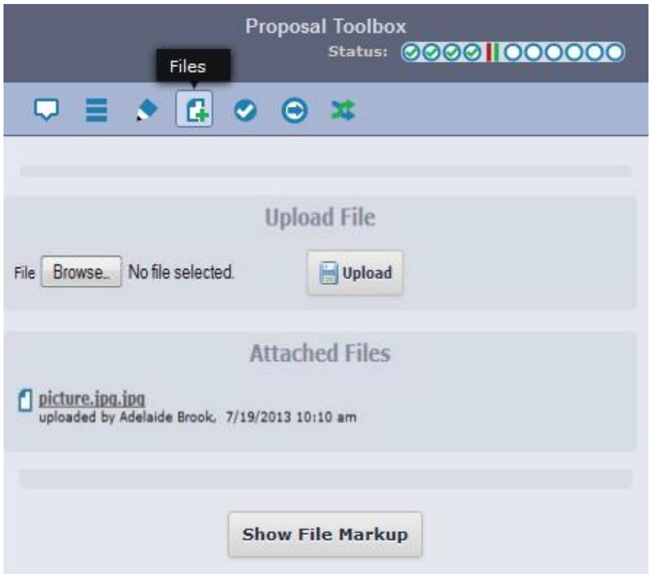
The status icon displays the proposal history within the proposal toolbox. The history indicates the status of each step, either approved, working, incomplete, or awaiting Administrative action. Additionally, information regarding each step is displayed. The color of the individual (for user tracking purposes) and the decision the individual made are displayed under Participants. Activity is displayed on the right and includes the threshold required for approval, how much time the proposal spent on that step, if changes or comments were made, which options were available to the user and if a signature was entered.



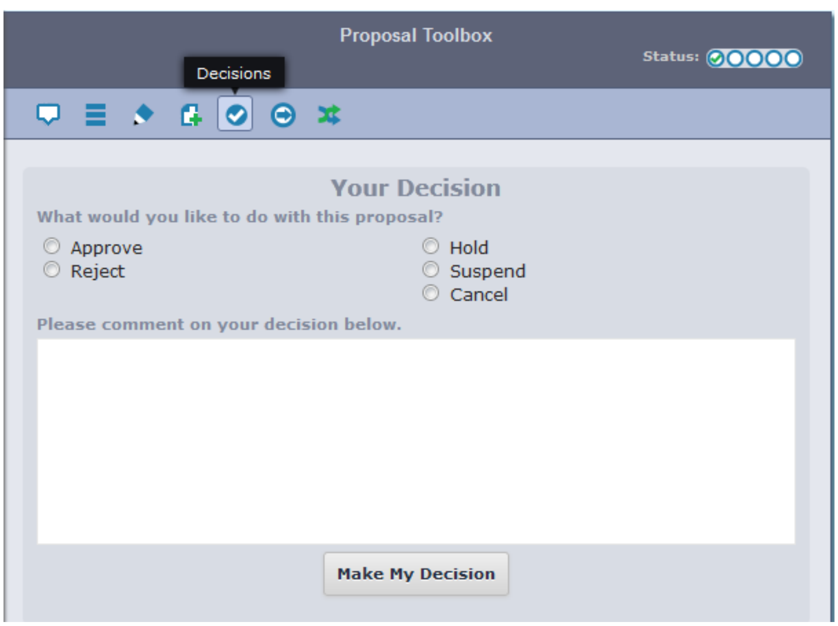
The Signatures icon displays each step and the signatures entered on the step.



Selecting the files icon allows you to view files attached to the proposal as well as upload files to a proposal. There is no limit to the number of files that may be uploaded to a proposal.



Selecting the decisions icon allows you to make a decision on the proposal and enter a comment for your decision. By default, the Approve and Reject options will display. However, you may have additional options based on the approval process. Entering a comment is optional when selecting approve. However, all other options require a comment to be entered. Simply select the radio button to the left of your desired decision and select "Make My Decision". Once you have made a decision, your work on this proposal is complete. If approved, the proposal may advance providing you are the only individual on the step or all other individuals on the step have also made a decision. If rejected, the proposal may be referred to the Originator or the previous step, depending on the settings determined by the Administrator. A message appears indicating your decision has been made and if the proposal is advancing or being referred.



Additional options may include hold, suspend, and cancel. If you select one of these options, a request will be sent to the Administrator to approve or reject your request. The definition of each option is listed below:

- **Hold** - Submits a request for the proposal to not advance in the approval process. The request is sent to the Administrator, who will approve or reject the request. The users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. Administrators have the ability to remove a hold on a proposal.

- **Cancel** - Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. No work will be allowed on the proposal during this time. If the Administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.

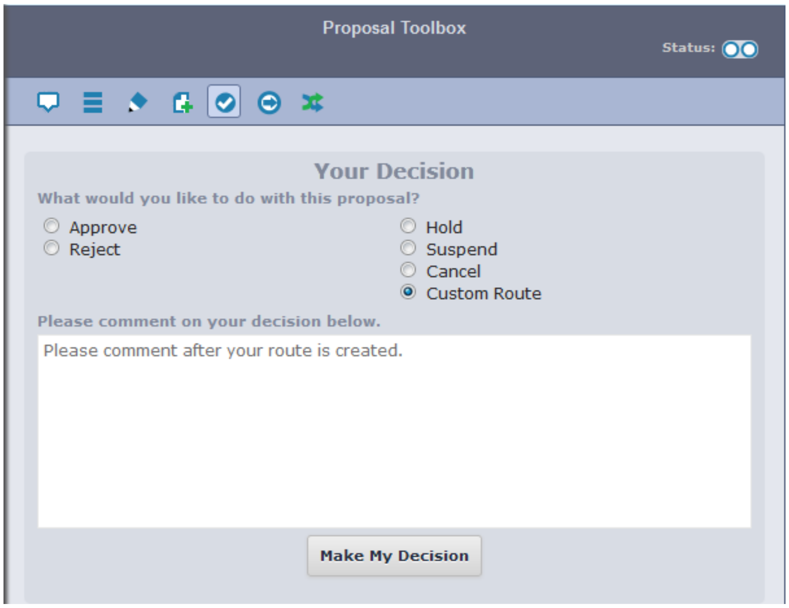
- **Suspend** - Submits a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspend is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspend placed on a proposal.

  Selecting one of these options will send a request to the Administrator.

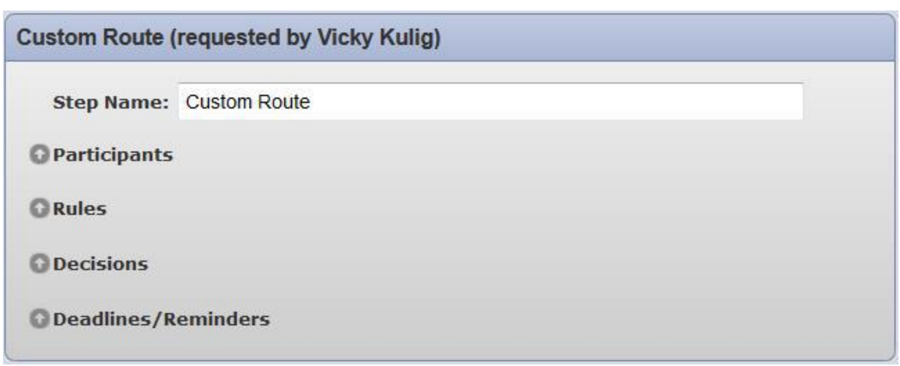
  Additionally, it will be noted in the step within status.

Set a Custom Route

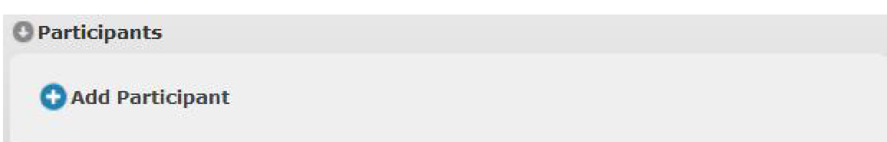
An additional decision that may be available to you is a custom route. A custom route is an additional ad hoc step outside the steps in the approval process. Typically you would use this type of decision if key individuals that are not customarily involved in the decision-making process need or want to be included. Custom routes require Administrator approval. If the custom route option is available, it will be listed in Your Decision within the Proposal Toolbox. This will allow you to bring someone else into the proposal that is not included within the current steps of the proposal.



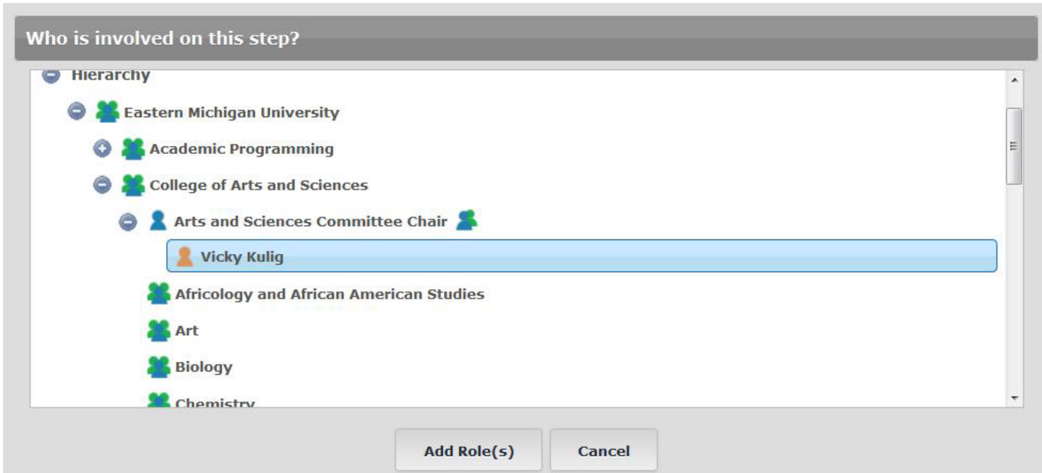
Select the radio button to the left of Custom Route and select "Make My Decision". The custom route workflow opens allowing you to choose the participant you would like to custom route the proposal to.



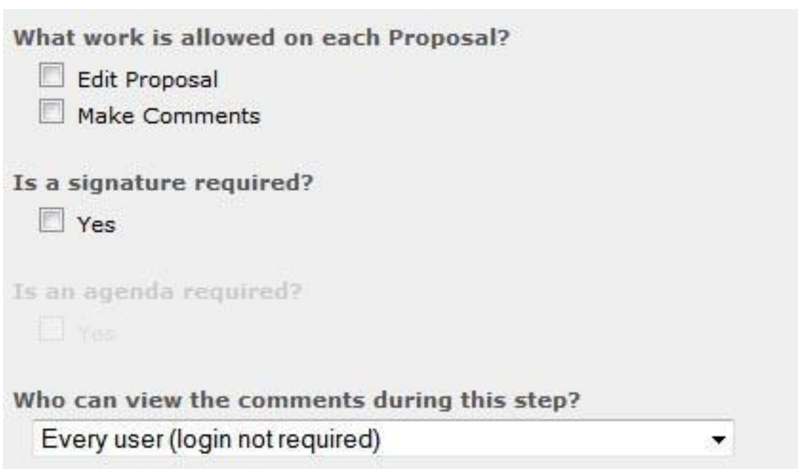
Select the grey arrow to the left of Participants and the option will expand. Select "Add Participant".



You may utilize the + symbol to expand the hierarchy items to view roles and utilize the + symbol to expand the users below each role. Click on the user to select them and their row will be highlighted blue. Next select “Add Role(s). You may select multiple roles or individuals within this workflow.



Rules include four options. Within rules, you may determine whether the users involved in this custom route step will have the ability to edit the proposal and/or make comments. You may also determine whether this step requires a signature from the user. The last option is a drop-down menu allowing you to determine who may view comments made during this step. You should restrict it to one of the options available from the drop down menu that is not “Every user (login not required).” UH currently does not allow for guest view of proposals without a login.



Decisions allows you to determine the actions required to approve or reject a proposal and advance it to the next step of the proposal. You have the ability to determine whether the step requires 100% approval to advance or if a “Vote” is necessary and enter a percent for approval.

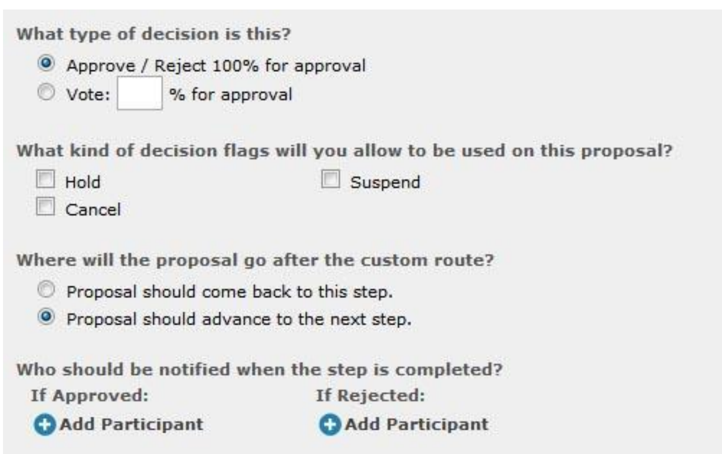
You may determine if Decisions flags are to be used on the proposal. If selected, the options will be available to the user on that step in addition to the Approve and Reject options under decisions. The flags available are as follows:

- **Hold** - Allows the user to submit a request for the proposal to not move on in the approval process. The request is sent to the Administrator, who will approve or reject the request. The users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. Administrators have the ability to remove a hold on a proposal.

- **Cancel** - Allows the user to submit a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. No work will be allowed on the proposal during this time. If the Administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.

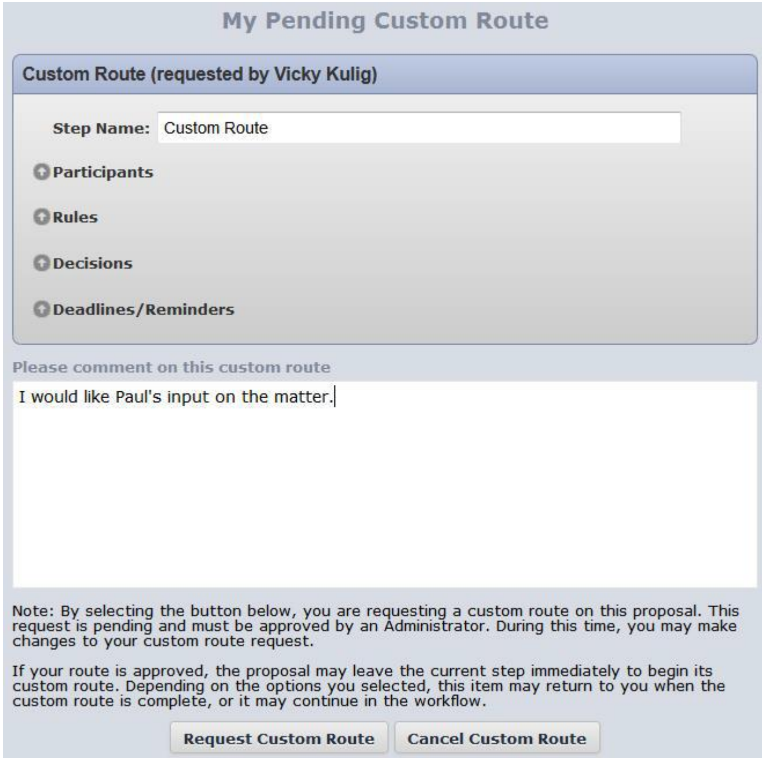
- **Suspend** - Allows the user to submit a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspend is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspend placed on a proposal.

You may also determine where the proposal will be routed after this custom route. Once the individual(s) on the custom route step make a decision, it may return to your step or it may advance to the next step. You may select users to be notified when the step is completed and you may add different users for approved and rejected steps. Again, you may select to assign role types rather than individuals that may change on different proposals. Once you have made all changes, select "Update Decisions". Note: A user may not create another custom route from a custom route step.

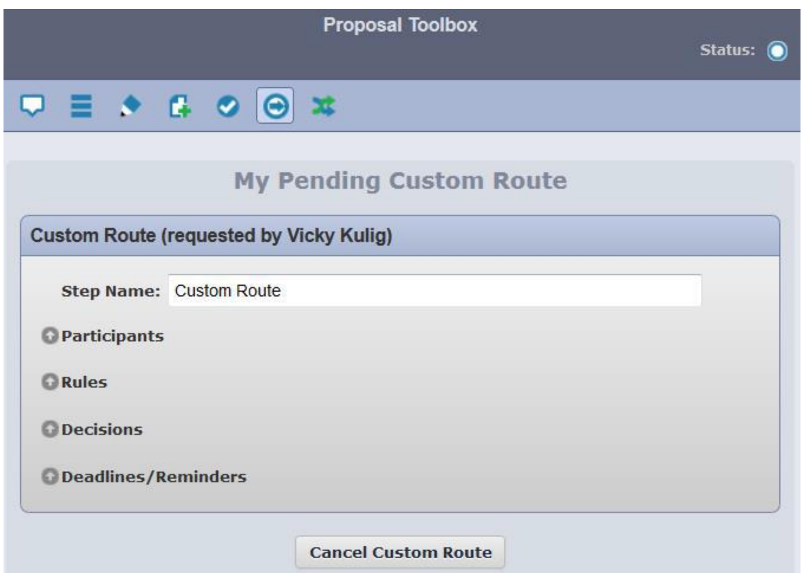


Editing the Deadlines/Reminders option allows you set a number of days to be allowed for a step and determine if reminders are to be sent to the users involved on the step. You may choose to automatically reject or approve the step if the deadline passes without action. You may also add users to be notified if the deadline passes without action, you may select role type, role, or individual user. Role types are recommended as a best practice.

Additionally, a comment will need to be entered before selecting “Request Custom Route”.



Once a custom route is requested, it may be canceled by navigating to the custom route icon, and selecting “Cancel Custom Route”.



When the Administrator makes a decision on the custom route, you will then be able to make your decision on the proposal. Once your decision is made, the proposal will then be advanced to the custom route (if approved).

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