



Curriculog™ End User Manual



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About Curriculog

Congratulations on your institution's purchase of the Curriculog Curriculum Management System!

Curriculog is the culmination of years of research with input directly from our customers on what they need in a curriculum management solution. It integrates with student information and degree audit systems, streamlines curriculum approval processes, and makes approved courses and programs available for catalog publishing.

Curriculog comes equipped with an easy to search online help and community. The contents of this manual are available within the online help through Curriculog University, though this manual compiles it into a single document for easy reading.

Note: *The online manual will always be the most up to date; but the revision date will always be included on the cover page of this manual. This version, 11, was revised September 2018.*

CONVENTIONS USED IN THIS MANUAL

We have attempted to make this manual as easy to read and navigate as possible for the end users. To that end, a few basic conventions will be used throughout – and administrative functions will not be covered.

Because all web browsers render web pages differently and some features may differ in your installation of Curriculog, the screenshots used in this manual may differ slightly from what is displayed in your web browser. These images are intended for reference only.

Each of this manual's sections may contain several sub-sections, which, in turn, may have their own sub-sections and so on. Using the CTRL + F (PC) or CMD + F (Mac) feature can help you locate certain keywords very quickly, or you may select an option from the table of contents to jump to that section of information.

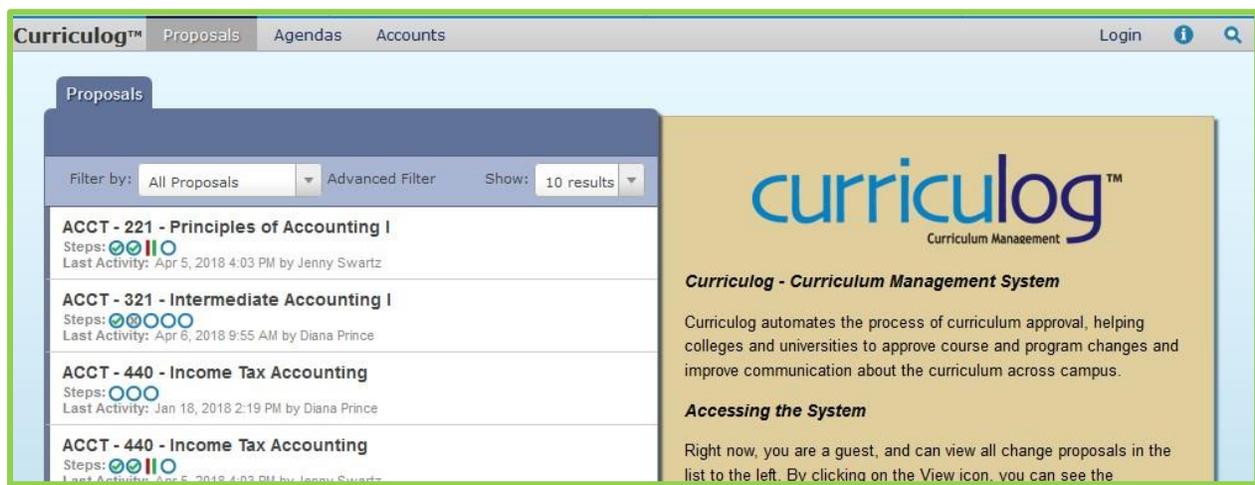
Throughout this manual, there are two types of users that will be referenced. 'Users', which will refer to the end User, who will manage proposals, agendas, and leave comments throughout the system. 'administrators' will refer to users who also have System Administrator access, allowing them to manage the setup of the system. This manual will cover the User's access only.



Guests

A Guest within Curriculum is anyone who visits the system but does not log in. Guests are unable to make any changes to content, provide comments, or modify proposals.

Guests to the system can enter and view active proposals at any time, access is based on transparency settings established by the administrator. Guest access for comments may be restricted by step, by proposal, or restricted entirely from the system. When accessing Curriculum as a guest, you may have access to view a summary of a proposal, the full proposal itself, agendas and/or reports.



Log In

To act upon proposals, leave comments, or provide decisions - you **must** have a user account and login. The login page is available to anyone who accesses the Curriculum website. To login, navigate to the upper right corner of the screen and select "Login".



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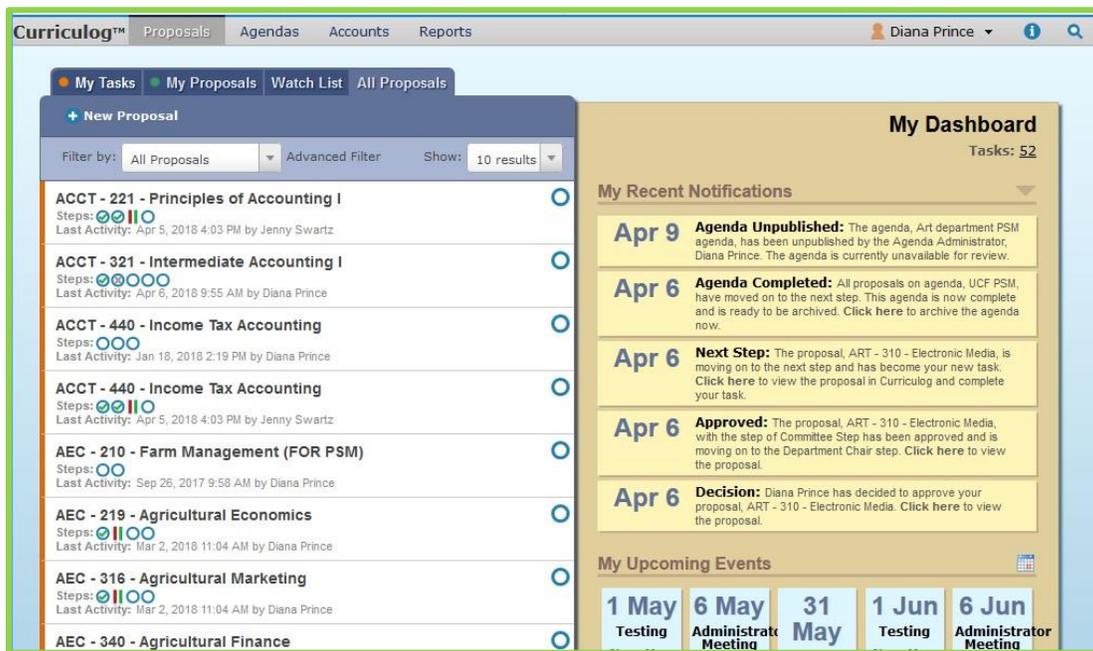
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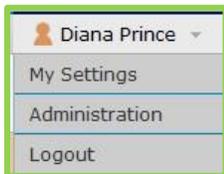
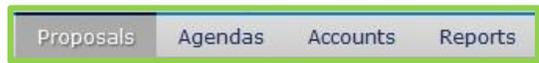
Users

MY DASHBOARD

Once you have logged into Curriculog, the first screen you will see is “My Dashboard.” This dashboard will serve as your gateway to Curriculog and allow you to manage your proposals and see recent notifications and upcoming events at a glance.

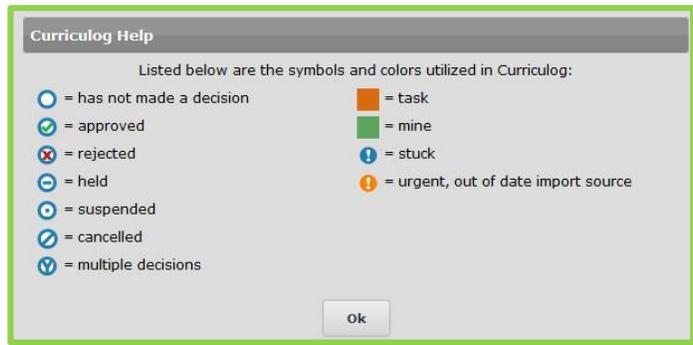


Once you have logged in, you will find several items within your dashboard. Across the top of the page you will find a persistent toolbar, from which you may access the [Proposals](#), [Agendas](#), [Accounts](#), and [Reports](#) Modules.



In the upper right corner, there are options for your own user account listed below the drop-down menu, giving you options for My Settings (selecting My Settings will redirect you to the Accounts Module from the top menu), Administration (only available if you are also an administrator) and Logout.

Following your name are “Help” and “Search” icons. If you select “Help,” a window featuring symbols and colors utilized in Curriculog will display.



The search function may be used to locate proposals based on their titles or users throughout the system.

Note: For more effective searching, we recommend using the Advanced Filter within the All Proposals tab.

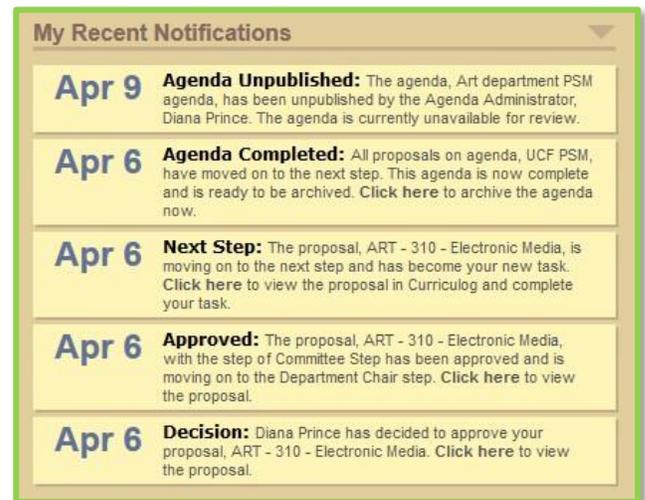
The right pane will display My Recent Notifications and My Upcoming Events. The left pane will update based on the tab selected.

If tasks are waiting to be completed, or if any of those tasks are marked as urgent, clickable links will appear just under the My Dashboard header. Selecting either the number following Tasks or Urgent will display the My Tasks tab in the left pane.

My Recent Notifications

You will receive notifications for a variety of reasons, such as a proposal receiving a decision, an edit being made, or a comment being provided. Notifications will be e-mailed to you based on your e-mail settings – some users choose to receive an e-mail notification as soon as the event occurs, while others choose to compile them into a digest to limit the number of e-mails received. In some cases, the administrator may choose the e-mail settings on your behalf.

The My Recent Notifications section of the Dashboard will show you the five most recent notifications. If additional actions are required, there may be a link provided within that notification. To scroll through more options, select the arrow in the upper right corner to scroll through them.



My Upcoming Events

My Upcoming Events will list the next five upcoming items. Events may include deadlines within your proposals, or events that the administrator has placed on the calendar. Events relating to your deadlines will be visible to you only; events placed by administrators will be visible to all users. To view the full calendar, select the calendar icon in the upper right corner.

Note: Only an administrator can add events to the calendar.



Selecting one of the upcoming events will expand and show additional details.

The calendar included within Curriculog is built to manage deadlines and track timeframes within the system. It will not export or import information, and it will not sync with any external calendar application.

PROPOSALS

A proposal is a form that follows a workflow to receive an approval and is tied to an approval process in a 1:1 relationship. Proposals may be used to create or make changes to courses or programs. Administrators will create an Approval Process, which you will select to act as the template to base your proposal on. 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.



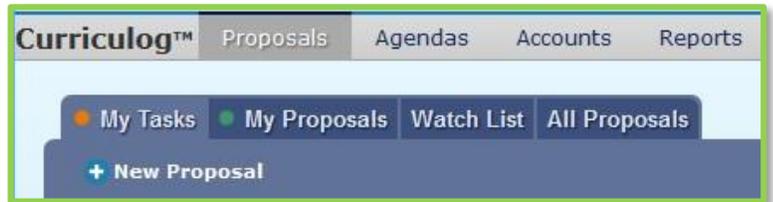
- **My Tasks** - lists all proposals in which you are an active participant and awaiting action from you.
- **My Proposals** - lists all proposals you have created, whether they have been launched or not.
- **Watch List** - lists all proposals you have selected to watch. You may or may not have editing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



Below these tabs is the New Proposal link. Selecting New Proposal will open the workflow to create a new proposal.

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 as you are not an active participant on this proposal on the current step.
- **Green** – You are the originator of this proposal, but you are not an active participant on the current step and no action is currently required.
- **Orange** – You are an active participant on the current step and an action is required from you.

There are numerous other icons that may be associated with proposals as well, which will be outlined below.

Urgent - Indicates a task is now considered “Urgent”. An item will be considered urgent once the urgency threshold has been met, which is set by an administrator. After the indicated number of days has passed, a notification will be triggered to prompt you to make a decision on the proposal. When an item is considered “Urgent,” it will be marked in your task list by this orange icon. Unlike a deadline, the urgency threshold does not trigger any automatic actions on a proposal.

View Summary - Will create a flyout on the right pane displaying information relevant to the proposal. The same flyout will appear by clicking anywhere within the proposal’s row in addition to the icon. The fields that appear in the Process Fields section will be determined by your administrator.

Edit Proposal – Available only if you are an active participant on the current step. Directs you to the proposal, where you may make modifications and enter your decision on this proposal depending upon your permissions.

Send message about Proposal – Allows you to send a message to another Curriculog user. The e-mail will be pre-populated with a link to the proposal you were reviewing, and will allow you to include one or more users, as well as a copy to yourself. Curriculog does not store a copy of any e-mail.

Watch Proposal - Allows you to keep track of a proposal in progress by listing under the Watch List tab, even if you are not a participant on any step.

Done Watching Proposal - Allows you to stop tracking the proposal and removes it from your Watch List.

○ My current decision - This icon will change based on what decision you have made on the proposal. The empty circle shown to the left indicates that no decision has been entered. The additional decision options are as follows:

✔ Approved – This indicates that your decision was to approve the current step. If you were the only decision needed on this step, it would advance in the workflow. If there are others involved on this step, it will wait until all needed decisions are received before advancing.

✘ Rejected – This indicates that your decision was to reject the current step. If you were the only decision on this step, the step will follow the rejection route laid out by the administrator: either it will return to the previous step, or it will return to the originator for further revisions. If there are others involved on this step, it will wait until all needed decisions are received before proceeding along the rejection route.

⊖ Held – This indicates that your decision was to request that the administrator place the proposal on hold, and the administrator has approved it. Now that the proposal is on a status of “hold”, you may continue to work on the proposal without worry that the deadline will automatically advance it to the next step. The proposal will stay on hold until the administrator manually lifts the hold status.

⊘ Suspended – This indicates that your decision was to request that the administrator place the proposal on suspend, and the administrator has approved it. Now that the proposal is on a status of “suspend”, the proposal will be removed from the workflow and nobody will be able to work on it. The proposal will stay on suspend until the administrator manually lifts the suspended status.

⊘ Cancelled – This indicates that your decision was to request that the administrator allow you to cancel the proposal and potentially delete it. This may be due to a proposal being created in error – such as the incorrect approval process being selected. Once the administrator has approved it, you may choose to delete the proposal. This is the only way you can delete a proposal after it has been launched.

⊘ Multiple Decisions – This icon is used to indicate that you have multiple decisions on this step – such as when a step has several committees voting on it, and you are a member of more than one of those committees, therefore providing multiple decisions.

✘ Delete a Proposal - Deleting a proposal will permanently remove it from Curriculog and should be considered a permanent action that cannot be undone. Proposals cannot be deleted after they have been launched unless they have been canceled by an administrator. The delete icon is always available for unlaunched proposals. If the proposal has been launched, you may be able to cancel it by selecting it as a decision if the administrator has provided it as an option - or by contacting your administrator.

|| Step Restart – This symbol indicates that a step was restarted. A restart commonly occurs when the users involved in the step are replaced with another user.

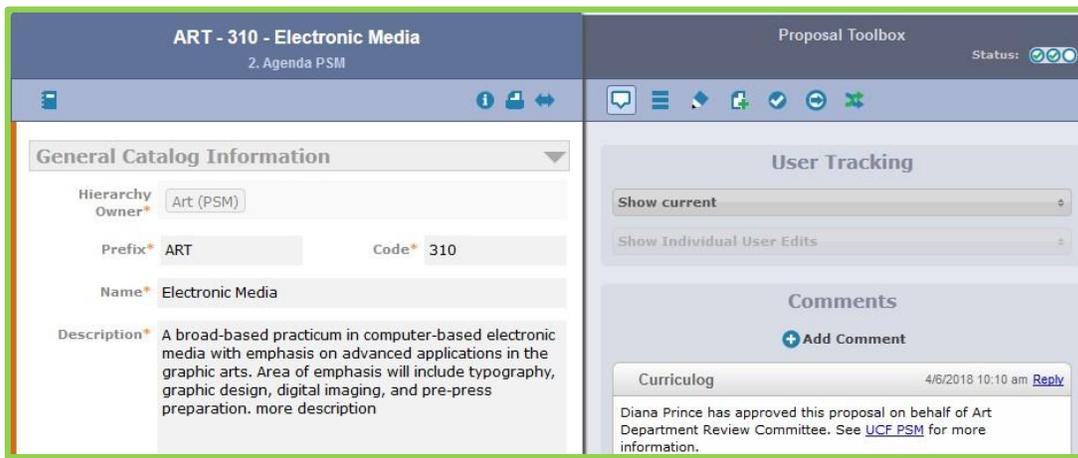
Editing a Proposal

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.

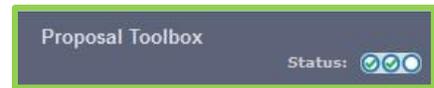


When you hover over a proposal, several icons will appear giving you options for interacting with the Proposal. Descriptions of each icon can be found [above](#).

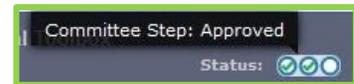
To make a decision or interact with the proposal, select the Edit Proposal icon. The proposal form will display allowing you to see the full proposal on the left and Proposal Toolbox on the right. The default view for the Proposal Toolbox will be the Discussion tab , where you will see the User Tracking and any comments.



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.



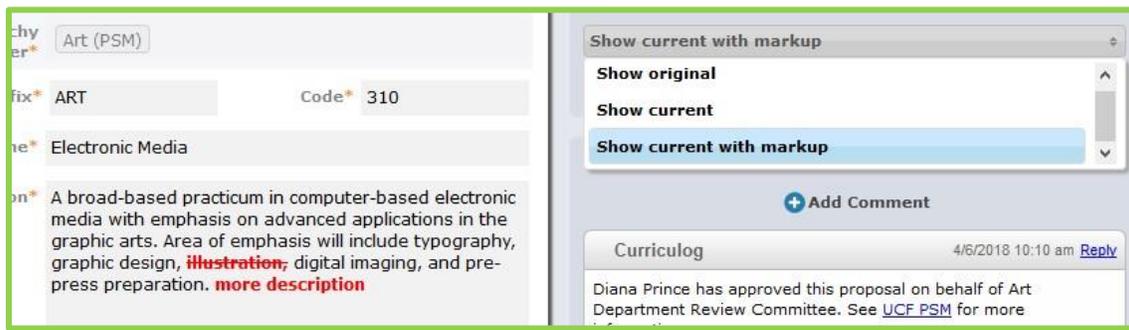
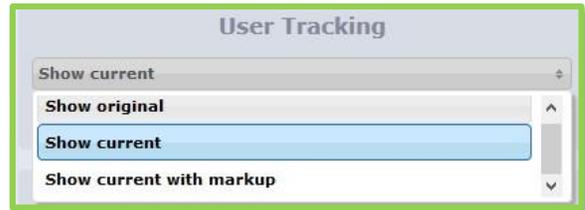
Hovering over a circle indicates the name of the step and the decision made on that step.



To review changes to the form of the proposal, you can review the User Tracking. The default view will be ‘Show Current’, which will be the current version of the proposal with all modifications. You can use the drop-down menu just under the “User Tracking” heading, and you’ll find the options for “Show original” and “Show current with markup.”

If you select “Show Original”, you will see the proposal in the state it was at launch as the originator submitted it.

If you select “Show current with Markup”, you will see the original proposal with the changes layered over it and highlighted in different colors to indicate each user who made the changes. If you hover over the changes, you’ll see a time and date stamp as well as the user’s name.



The second drop-down menu allows you to select which users edits you would like to see. The default will be to show all edits by all users – but if you select the menu, you can choose on a step by step basis, to remove a user at any time to see the proposal before and after their edits were added.



Comments will appear below the user tracking, although your ability to see them will vary based on the transparency set by the administrator. If the permissions on the current step allow for it, you may reply to any existing comments or add new ones using the available links.

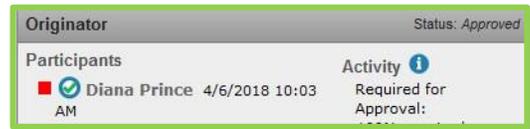


Depending upon how a step has been set up, you may edit the proposal, provide comments, or function as an Agenda Administrator.

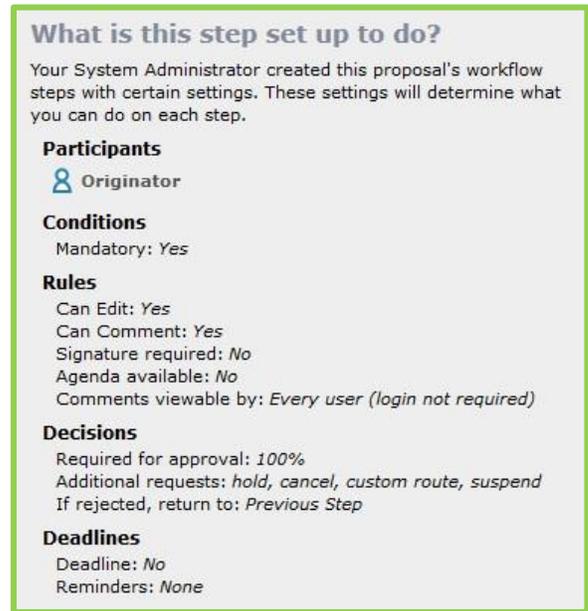
To review step options and see permission levels, select the Status icon from the Proposal Toolbox, and click on the within any step.



In the Rules portion, you will be able to see the settings for each step.



- *Can Edit*: Yes indicates that a user on this step will be able to make modifications.
- *Can Comment*: Yes indicates that a user on this step will be able to leave comments.
- *Signature required*: Yes indicates that a user on this step will be required to provide a signature when they place their decision.
- *Agenda Available*: No indicates that this step will not allow for committee functionality, or for the proposal to be placed on an Agenda at this time.
- *Comments viewable by*: Every user indicates the level of transparency the administrator has set.

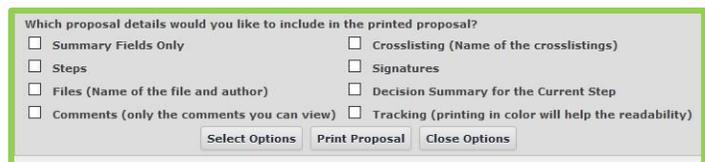


Note: Only an administrator can modify these settings.

Knowing what permissions you have on your step will make your work within Curriculog easier. For example, using the step in the screenshot to the right as an example – knowing that an ‘Agenda Available’ is set to no, you won’t be looking to create an Agenda for this step or wonder why there are no committee options available.

Printing Proposals

You may also choose to print your proposal at any time by selecting the Print Friendly icon from the upper right corner of the form. When you choose to print the proposal, you will be presented with a print friendly version of the form. If you would like to include more details, you can select “Print Options” and use the checkboxes to select the information you would like to include in your printed version.



You may also choose to expand the form into a full screen view, by selecting the Toggle Full-Width Form icon . This can be toggled on or off at any time.

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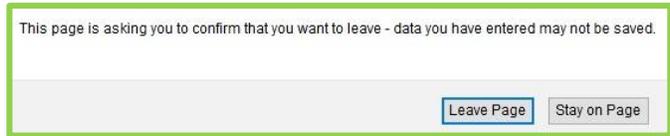




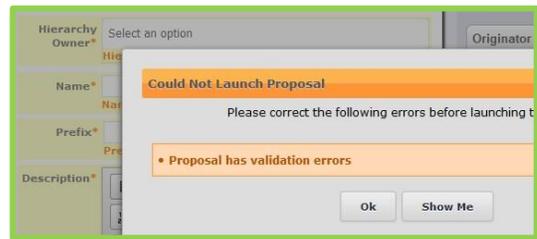
Proposal Fields

There are several types of fields within a form that will be filled in to house information about your proposal.

If you are entering information into a new proposal - be sure to save your information regularly by using the “Save All Changes”  that appears at the top or bottom  of the page. If you navigate away from the page without saving, the changes will be lost. As you work on the page, fields that have been modified will be highlighted in blue indicated they haven't yet been saved – once you save, the blue highlight will fade. If you try to leave the page without saving, you will be prompted to save the page.



When you are ready to launch, fields will be validated to ensure required fields have content. Any required field, which will be indicated by a red asterisk, that is left blank will fail validation – and the proposal will be unable to launch. Fields missing information will be highlighted in yellow, to indicate which ones must be filled in prior to being able to move on to the next step.



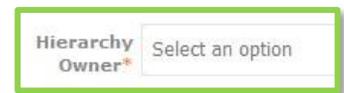
If you are making changes to an existing proposal – you will need to save **each** field as you work by click the save button that appears under each field.



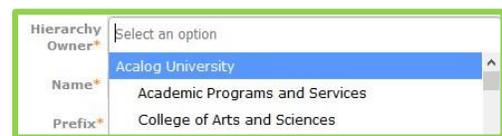
The following types of fields may be found in any proposal.

Hierarchy

The first item will be the “Hierarchy Owner” field, which designates the owner of the information within Curriculog, and is used to assign the appropriate users to steps. Many institutions choose to rename this field to something more relevant to their needs – such as department, school, or college – but the default title within Curriculog is “Hierarchy Owner”. This is a required field within Curriculog that cannot be removed, must be selected prior to launch, and cannot be changed once the proposal has been launched.



By clicking in the field, you will be able to choose an item from the populated list – you can also begin typing in the field to quickly locate options; the dataset available is the entity list from your Hierarchy module. Your administrator may choose to limit this list further by choosing to restrict it by an entity type, allowing you to select only departments, for example.

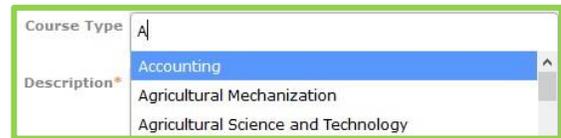


The primary purpose of the hierarchy is to indicate the user who will be brought onto the step – so if you have selected an entity and there is a step unable to locate a user within that entity – you will be unable to launch the proposal. If a user is missing on a step you will see an orange icon with an exclamation point next to the missing participant. Your options will be to either choose a different entity from the hierarchy, or to contact an administrator for assistance.

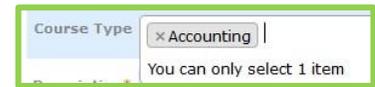


Smartfields

Any time a field presents the option, “Select an option,” you will be able to select an option from an available list, similar to the hierarchy. This type of field is known as a Smartfield, and the options available are designated by your administrator. You will not be able to change the options, and if you do not see the appropriate option available – you will need to contact them for additional information. In addition to using your mouse to select from the list, you can also begin typing to quickly locate an item.



If the administrator allows it, you may choose more than one option. To remove a selected option, click the “x” next to the options name.



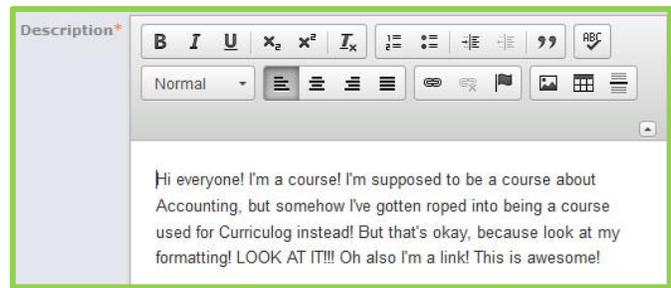
Text Fields

Code, displayed here, is an example of a text field. A text field will allow you to input a small amount of text. Information placed here will need to be entered as plain text – no formatting can be applied of any kind. (Nothing in bold or italics; no HTML or JSON) An administrator may apply a maximum character length on the field or apply validation rules such as ensuring it is formatted as an e-mail or phone number – so be sure to check any help text or directions provided within the form.



Text Area

Text areas give you a much larger field to work with and may include a WYSIWYG editor. If the administrator has provided the editor, you will be able to format the text using the tools available within the editor. If you are pasting information into the editor – it is recommended that you paste plain text. As the editor does not contain a native ‘paste as plain text’ option, you can use a tool like ‘Notepad’ (a native tool within most PCs) to paste your content into first, and then paste into the editor to ensure it is entered as plain text.



Note: Permalink information brought in from Acalog as part of an import will be available for review but may not be created nor modified within Curriculog.

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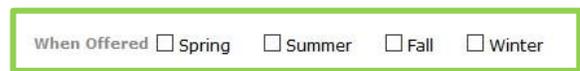
Radio Buttons

Some fields will provide you with an either/or type of option, or a yes/no scenario, or a list of options in which you must choose a single answer. These selections are presented using a radio button – indicating you may make only a single selection. The administrator may choose to order the list vertically or horizontally on the page based on their own aesthetic preference, but they will function the same.



Checkboxes

A checkbox is used to allow for multiple selections to be provided. Like a radio button, checkboxes can also be presented either horizontally or vertically on the page depending on the preference of the administrator.

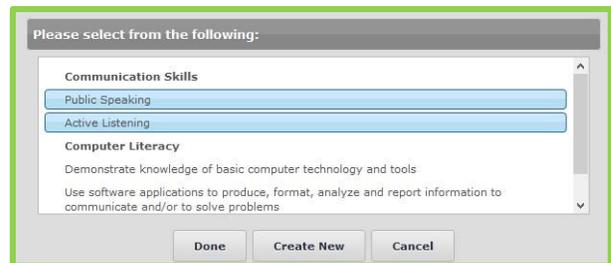


Learning Objectives (Courses Only)

The Learning Objectives field will be available when your administrator has the Assessments enabled, allowing you to provide objectives that may apply to your proposal. To enter a new objective, select “Add New Item.”



This will launch the list of available options that the administrator has predetermined for you (similar to a Smartfield) allowing you to select one or more of the options. Each option you select will be indicated with a blue highlight, and when you have made all your selections, click “Done” to add them to your proposal.



If you do not see an appropriate option, and your administrator has enabled the feature – you may also use the “Create New” button and enter a custom objective.

Once an objective has been added to the proposal, it can be removed by clicking the “Remove” button that appears below it.



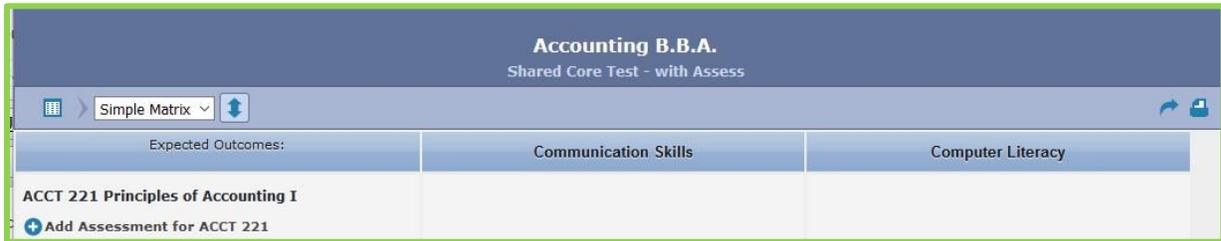
Expected Outcomes (Programs Only)

The Expected Outcomes field will be available when your administrator has the Assessments enabled, allowing you to provide outcomes that may apply to your proposal. The workflow for adding the assessment information will follow the same path as the Learning Objectives above.

The second feature included with the assessments tool is the program map , available at the top of the proposal near the import icon. After you have added contents to your Prospective Curriculum and Expected Outcomes fields, you can use the program map to determine whether the courses linked in the curriculum will line up with the outcomes that have been provided.



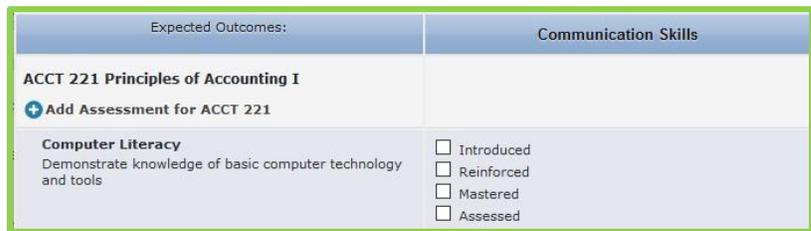
The icon will launch the map in the default view, showing the Simple Matrix.



The courses listed in the curriculum will appear down the left side, with an “Add Assessment” option under each one. Selecting this option will provide the predetermined list of assessment options, allowing you to select the ones that this course may fulfill. Once you have selected the option, it will appear below the course with a checkbox under each of the outcomes assigned within the proposal, where you may indicate where it has been accomplished within this program.



Changing the “Simple Matrix” drop-down menu at the top of the page to the “Skill Matrix” option will change the values under the assigned outcomes from just “Accomplished”, to a range of options from “Introduced” to “Assessed.”



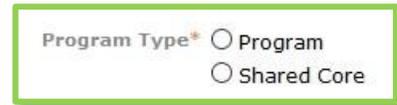
The use of the program map does require manual input; and even when importing information into the program – recall the course details only import course prefix, code and name.

Note: Although the program map does include an icon in the upper right corner for exporting the map to a CSV and for printing, there is currently an issue with these two features. The export icon will currently not deliver the file and provide an error page; and the print version of the file contains a large amount of additional spacing. Our Development Team is working to locate the underlying cause of this issue and a resolution as quickly as possible.



Program Type (Programs Only)

The Program Type field is used by Curriculog on program type proposals to determine if the proposal is going to be a program or a shared core – much like how Acalog uses two different tabs to differentiate between the two. In some cases, your administrator may choose to disable this field and not require a selection. In others, they may have renamed it – the most common renaming is ‘type of program’ – and it must be selected prior to being able to import program information.



Shared Cores will follow the same rules within Curriculog that they do in Acalog: if you attach a Shared Core to a program, you won't be able to edit the Shared Core within the program. It would require a separate proposal to make changes to the Shared Core. Changes to a Shared Core will impact all programs that it is attached to.

Prospective Curriculum (Programs Only)

Curriculog structures programs using a series of cores, sub-cores and even shared cores – matching the format of Acalog so that the two systems can easily communicate with one another and allow for the easy import of data between them.

Each core created can have a title, description, and courses attached to them. You can have any number of cores, multiple levels of cores – and even shared cores which allows for data to be shared across multiple programs.

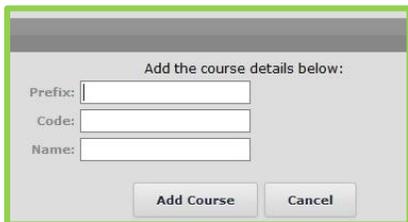
The Prospective Curriculum field is specific to Program type proposals and is where you will build cores into your program and attach courses.



The Curriculum section has two views available: View Curriculum Schema and View Curriculum Courses.

View Curriculum Courses will be the default view, as courses must first be attached under View Curriculum Courses to be available for use within Cores under View Curriculum Schema. You will have the options of importing courses or manually adding them.

Note: if the “Import Course” option is not available, you will need to contact an administrator to grant you permission to import.



If you elect to manually add a course, you will need to provide a Prefix, Code and Name for that course. This option should be used sparingly, ideally for courses that may be going through a proposal at the same time and do not yet exist in your external system; especially if that system is Acalog as it may impact the program's ability to import.



The best practice for bringing in new courses to use within your proposal will be to import them. To import a course, select “Import Course”. A pop-up window will display featuring Integration Manager, providing a list of any catalogs your administrator has made available to you. Select the catalog you would like to import from.

Import Data Into Your Proposal
Select an external system from which you would like to import courses.
Acalog: Curriculum Training Catalog
Cancel Import

Next, you will be presented with filter options that may be used to find the course you would like to import.

Search Curriculum Training Catalog
Using the faceted search below, locate the course or program you would like to import into this proposal.

Filter Courses
Prefix = ACC* X
Add another filter Filter by field
Start Date: End Date: Sort Results By: Prefix X Code X Name X
 Exclude previously imported items
Search Available Curriculum Select Another External System Cancel Import

Search Results (1 to 17 of 17)
ACCT 221 Principles of Accounting I
ACCT 222 Principles of Accounting II
ACCT 315 Managerial Accounting
ACCT 322 Intermediate Accounting II (previously imported)
ACCT 326 Microcomputer Applications in Accounting

The search will default to searching through all courses, but you may use the “add filter” drop-down menu to select additional filtering options. Each option allows you to select a field from the courses template that you can then enter a value to search on.

Once you have added at least one filter, you cannot leave the field blank when you search, or you will receive zero results. It will also not accept partial searches – for example, ‘ACC’ will not return any results for ‘ACCT’; but you can use the * as a wildcard. Entering ‘ACC*’ for example, would return ‘ACCT’ courses.

ACCT 322 Intermediate Accounting II (previously imported)
ACCT 326 Microcomputer Applications in Accounting

The “Exclude previously imported items” checkbox is a toggle that would remove items that have been imported by any user from your list of search results. If unchecked, the items would appear in your results but would be italicized to indicate that they have been imported previously. It will not prevent you from importing the item a second time; it will just serve as an indicator.

Note: If the cache has been cleared by an administrator, the exclude previously imported items flag may be reset.

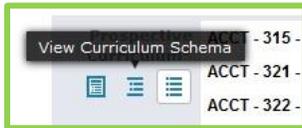
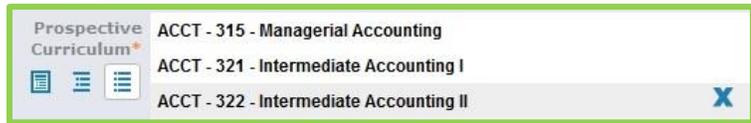


When reviewing the search results, you can click on them to add them to the proposal, and they will be added to the “Selected Courses” area at the bottom of the page. Selected courses will be indicated in a darker gold color.

When all the courses have been selected, click on “Add Courses to Proposal”.

Once courses are added, they will be listed in the “View Curriculum Courses” section of the proposal. If you would like to remove any, you can hover over them and a blue “X” icon **X** will appear – clicking it will remove the course from the list.

Note: Only the prefix, code, and name of a course will appear within the programs in Curriculog.



Now that courses have been added, they can be used within cores. To create a core, select “View Curriculum Schema”. Next, you will need to decide if you are going to create a New Core or if you are going to import an existing Shared Core from Acalog.

When you choose “Import Core”, it will launch Integration Manager, asking you to select the catalog you’d like to use. Next, you will be presented with a filter, allowing you search for a specific Shared Core to import.



When you select a Shared Core, it will be added to the list of available cores on the “View Curriculum Schema” schema tab, with a padlock symbol.



The Shared Core can be expanded for review by clicking on it, displaying the description and any attached courses or custom text that may be associated. **Contents within a Shared Core cannot be modified within the program.** This includes modifications to the title, description, courses associated, or any sub-cores. To make any modification to a Shared Core, you will need to create a new proposal and choose ‘Shared Core’ in the Program Type field.



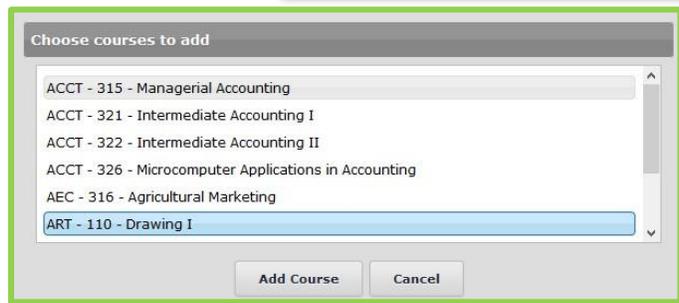
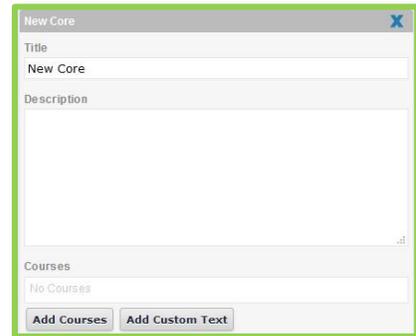


When you click “New Core”, a new core will be added within the “View Curriculum Schema” tab with the default title of “New Core.” To modify the core, click on the “New Core” row. The box will expand displaying additional options, including a title and description field.

Replacing the title will update the text in the gray bar. The description field may or may not have a WYSIWYG editor available, depending upon the settings your administrator has selected.

Note: Remember that Permalinks imported from Acalog into Curriculog within Rich Text fields will be maintained, however you will not be able to create or modify them within Curriculog.

When you select “Add Courses” a dialogue box will display with courses that you may choose from. The courses in this list are populated based on the courses you have previously added on the “View Curriculum Courses” tab – if you do not see a course that you need to add, you will need to return to that tab to add it first before you can add it to your core. When you select a course, it will be highlighted blue. Once you’ve selected all the courses you would like to attach to the core, select “Add Course” and they will be listed under your core.

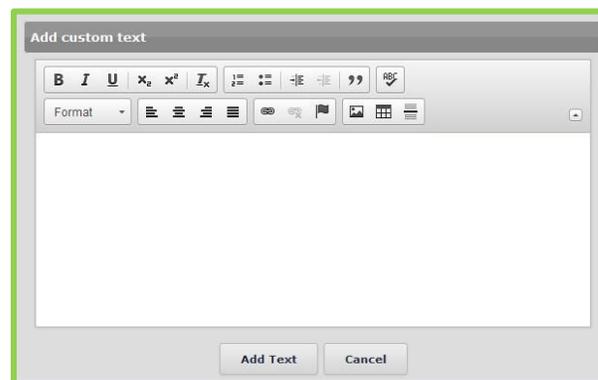


If the courses are not listed in the order you would like them, you may drag and drop the courses into the correct order. The courses will save automatically once you release them.



If you wish to remove any courses, hover over them and click on the blue “X” icon **X** to remove them. Removing them from the core does not remove them from the “View Curriculum Courses” tab, and you may use the course within other cores in this program.

Custom Text may be used to place text between courses – similar to the way that Ad-hoc text is used within Acalog. Clicking “Add Custom Text” will display a dialogue box where you may enter text. If your administrator has enabled rich text, you will be able to format the Custom Text using the provided WYSIWYG editor. When you are done entering your text, select “Add Custom Text”.



Note: You must add at least one course before you can add Custom Text.



Once Custom Text has been added, it can be modified by selecting the pencil icon  to the right of it – or removed by selecting the blue “X” . You may also drag the Custom Text up or down throughout the list of courses to place it where you would like.



Note: Custom text can only be placed between courses within Curriculog. To move Custom Text to the left or right of courses, you will need to export the completed program to Acalog and move the ad-hoc information into the desired location. This may require an administrator.

After you’ve finished making changes to a core, you may collapse it by selecting the gray bar displaying the core title.

When you hover over a core - two icons will appear. To the left of the core title, you will see a gray up and down arrow  which allows you to



drag and drop the core, and the blue “X”  icon which will allow you to delete the core. If you choose to delete a core, you will see a dialogue box appear asking you to confirm if you would like to delete the core. Deleting the core will delete the title, description, and associated courses and Custom Text – although the courses will remain available within the “View Curriculum Courses” tab for use within other cores in the program. Each time you add a new core – either manually or by importing a Shared Core, it will appear at the bottom of the list.

Selecting the grey arrow icon  will enable drag-and-drop functionality to move the core. If you would like to create a sub-core– meaning you would like to have a core appear below and indented under another–you will need to drag the second core down below the desired parent core, then move it in to the right to fall below the desired core. When you release the core, the ordering will save automatically.

Cores cannot be re-parented beneath a Shared Core, and Shared Cores cannot be re-parented beneath a core. The programs and Shared Cores within Curriculog will follow the same rules and structure that they do within Acalog to ensure that they can send data back and forth. The system will prompt you with a reminder if you attempt to parent a Shared Core in a way that is not permitted.



You may create as many levels of sub-cores as needed to develop your program.

The third icon available within the Prospective Curriculum field is the Preview Curriculum icon.  You may use the Preview Curriculum icon at any time to preview the Prospective Curriculum field.

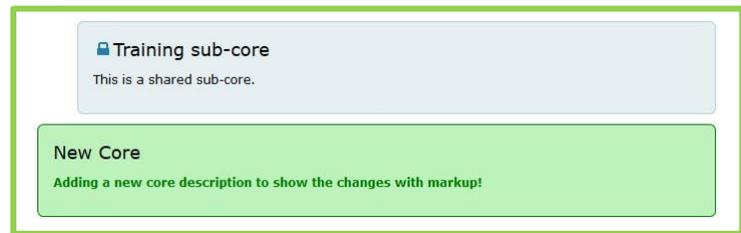
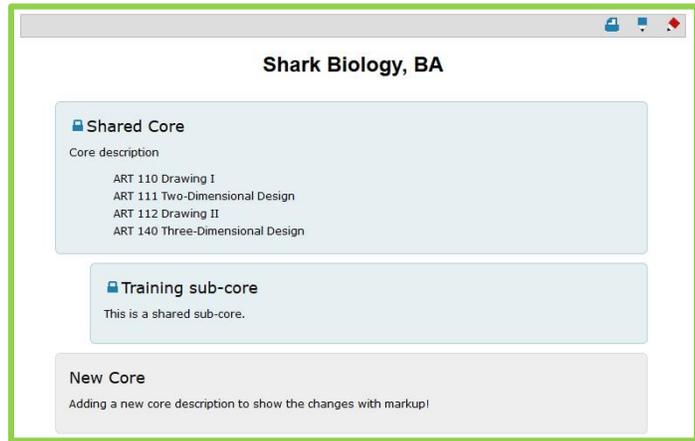
Note: The Preview Curriculum tab displays ONLY the Prospective Curriculum field – it does not display any other elements of the program proposal or any of the course details beyond prefix, code, and name.

The preview will open a new window and display the contents of the Prospective Curriculum field with each core expanded. You will be able to see the title and description for each core, as well as the prefix, code, and name for each course that has been attached, and any associated Custom Text.

The preview will reflect the structure of your cores and indicate which are Shared Cores for reference.

The top right corner of the preview will contain three options – print , Show Curriculum Preview , and Show Curriculum Preview with Markup .

Print will launch your browser's print option to print this screen. Show Curriculum Preview with Markup – provided your administrator has enabled the user tracking – will indicate in green anything that has been added and indicate in red anything that has been removed. It will not specify which user performed which action in this view – you would need to use the "User Tracking" tool to see that level of detail. To return to the preview, you would choose the Show Curriculum Preview icon again or close the window to return to the program to make further modifications.





New Proposals

When you need to create a new proposal, from your Dashboard you'll need to click on the link for "New Proposal", and then choose from the list of available approval processes that your administrator has made available to you. There are four tabs across the top that can be used to help narrow your selection – All Processes, Courses, Programs, and Others.



- **All Processes** – Displays all Approval Processes within the System
- **Courses** – Displays only those of the Course type
- **Programs** – Displays only those of the Program type
- **Others** – Displays only those of the 'blank' type. These processes will not allow you to import or export information.

You can also use the "Sort by" drop-down menu to sort processes by either title or type to help select. Processes featuring the blue and green arrows  indicate a crosslisting option, within course type processes. Processes with a title that is grayed out and italicized are in edit mode and undergoing revisions by the administrator – you will be unable to select these at this time. Processes that are grayed out are deactivated and unable to be used.

If you would like to preview an approval process before starting it, you can select the preview form icon . This will open a new window, previewing only the form of the proposal. None of the fields will be functional within the preview.

To begin a new proposal, click the new proposal icon .

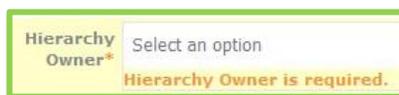
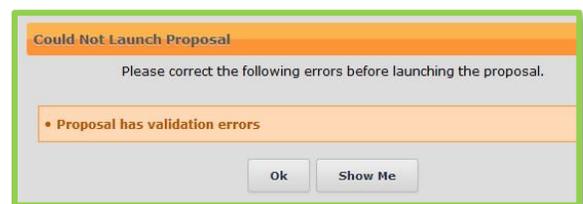
Creating New Items

When you are filling in a proposal to create a new item, you will need to fill in all required fields within the form. Required fields are noted with a red asterisk. As you work in the form, be sure to save your work often by using the save at either the top of the page, or the floating "Save All Changes" at the bottom. As you work, fields you have modified will be highlighted in blue and will stay highlighted until you save. Once you save, the blue highlight will fade. If you try to navigate away from the page without saving your changes, the browser will prompt you to save before allowing you to leave.



Once you have reached the end of the form, you will need to launch the proposal to send it into the workflow. To launch it, you will need to scroll back to the top of the page and click the "Validate and Launch" icon  from the upper left corner.

At this time, the system will verify if any required fields have been left empty. If they have, they will be highlighted in yellow and the proposal will be unable to launch. A message will appear indicating that you have missing information – if you click "Show me", it will take you to the first of the required fields.





Once all the required fields have been filled in, the proposal will be able to launch. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the work flow. You may choose to review the section on [Editing a Proposal](#), or move on to Providing a Decision.

Changes

When you are creating a proposal for revisions to a course or program that already exists – you will begin by importing the existing catalog information.

Note: If this proposal is for a program, the first step will be to indicate if this is a program or a Shared Core in the Program Type field. This must be declared prior to choosing the import icon.

Program Type* Program
 Shared Core

Start by selecting the import icon  from the upper left corner of the proposal.

Import Data Into Your Proposal
Select an external system from which you would like to import courses.
Acalog: Curriculog Training Catalog
Cancel Import

This will open a pop-up window listing all available catalogs you can import from. The available catalogs are determined by your System Administrator.

Next, you will be presented with filter options that may be used to find the course you would like to import.

Search Curriculog Training Catalog
Using the faceted search below, locate the course or program you would like to import into this proposal.

Filter Courses
Prefix = ACC* X
Add another filter Filter by field
Start Date: End Date: Sort Results By: Prefix X Code X Name X
 Exclude previously imported items
Search Available Curriculum Select Another External System Cancel Import

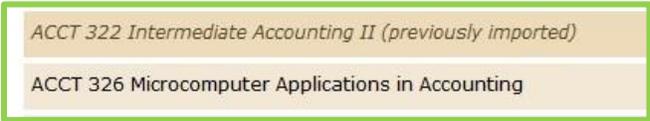
Search Results (1 to 17 of 17)
ACCT 221 Principles of Accounting I
ACCT 222 Principles of Accounting II
ACCT 315 Managerial Accounting
ACCT 331 Intermediate Accounting I

The search will default to searching through all courses, but you may use the “add filter” drop-down menu to select additional filtering options. Each option allows you to select a field from the courses template that you can then enter a value to search on.

Once you have added at least one filter, you can not leave the field blank when you search, or you will receive zero results. It will also not accept partial searches – for example, ‘ACC’ will not return any results for ‘ACCT’; but you can use the * as a wildcard. Entering ‘ACC*’ for example, would return ‘ACCT’ courses.



The “Exclude previously imported items” checkbox is a toggle that would remove items that have been imported by any user from your list of search results. If unchecked, the items would appear in your results but would be italicized to indicate that they have been imported previously. It will not prevent you from importing the item a second time; it will just serve as an indicator.



Note: If the cache has been cleared by an administrator, the exclude previously imported items flag may be reset.

Once your search has located the item you would like to import, click on the title. You will then be able to preview all mapped data available to import. By default, all details will be marked for import, but you can choose to uncheck any items if you do not want to import them. To complete the import, click ‘Import this Item’. You may also choose to “Return to Search” to choose another item, or “Select Another External System” to choose another catalog, or “Cancel Import” to cancel entirely.

Import Data Into Your Proposal

Confirm the fields that will be imported into your proposal (only fields that are mapped will be listed here). If you would like to prevent the imported data from overwriting an existing field in your proposal, click “Import Field” to uncheck that field.

Once you click Import, your data will be validated against the proposal. Any data that is incorrect will have a message telling you what is wrong with the data, and it will not be imported into the form to prevent errors.

Field Name	Data Preview	Import Field
» Data Points: Hierarchy Owner	Agricultural Sciences	<input checked="" type="checkbox"/>
» Data Points: Name	Wildlife Management I	<input checked="" type="checkbox"/>
» Data Points: Prefix	AG	<input checked="" type="checkbox"/>
» Data Points: Code	335	<input checked="" type="checkbox"/>
» Data Points: Description	Introduction to wildlife management. Principal wild birds and animals of economic importance to Florida farms. Methods and techniques of population manipulation.	<input checked="" type="checkbox"/>
» Data Points: When Offered	[no data]	<input type="checkbox"/>
» Data Points: Course OID	156952	<input checked="" type="checkbox"/>

Once you have imported the information, the window will close, and your proposal will be populated with all of the information from the course catalog.

Now that you have imported the existing catalog data; the best practice is that you do **NOT** make changes to the existing information. Complete any remaining required fields and launch your proposal by selecting the launch icon from the upper left corner of the Proposal. This will be critical to ensuring the User Tracking function is able to capture all edits as the tracking begins on step one.

Once the proposal has been launched, it will move to the first step in the process. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the work flow. You may choose to review the section on [Editing a Proposal](#), or move on to Providing a Decision.

Proposal Toolbox

The Proposal Toolbox appears on the right-hand side of the screen when working within any proposal, and includes several options for interacting with your proposals.

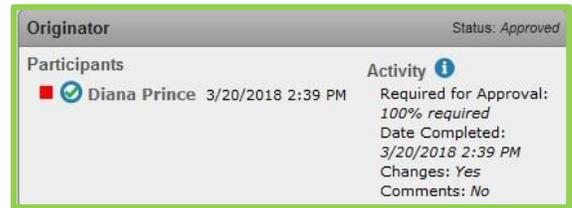
Discussion

The first icon  indicates the Discussion tab. The Discussion tab is the default view of the Proposal Toolbox that you will see when first accessing a proposal. It is used to display the User Tracking information, as well as any comments that have been entered on the proposal. More details about the User Tracking and comments are listed under the [Editing a Proposal](#) section.

Status

The next icon  is for the Status tab. The status tab will allow you to review the Proposal History – a log of all of the steps that have already occurred, the step it is currently on, and any steps that still need to happen.

On each step you'll find the name of it within the darker bar at the top along with the status – for example, this screenshot indicates that the step was approved. Under Participants you will be able to see any users who were required to take action on this step; if they performed any edits on this proposal you will see an edit color assigned to them (red, in this example), and if they provided a decision you will see the decision in the circle next to their name (approve).



To review step options and see permission levels, click on the  next to Activity within any step.

In the Rules portion, you will be able to see the settings for each step.

- *Can Edit*: Yes indicates that a user on this step will be able to make modifications.
- *Can Comment*: Yes indicates that a user on this step will be able to leave comments.
- *Signature required*: Yes indicates that a user on this step will be required to provide a signature when they place their decision.
- *Agenda Available*: No indicates that this step will not allow for committee functionality, or for the proposal to be placed on an Agenda at this time.
- *Comments viewable by*: Every user indicates the level of transparency the administrator has set.

Note: Only an administrator can modify these settings.

Knowing what permissions you have on your step will make your work within Curriculog easier. Using the step in the screenshot to the right as an example – knowing that an 'Agenda Available' is set to no, you won't be looking to create an Agenda for this step or wonder why there are no committee options available.

What is this step set up to do?

Your System Administrator created this proposal's workflow steps with certain settings. These settings will determine what you can do on each step.

Participants
 Originator

Conditions
Mandatory: Yes

Rules
Can Edit: Yes
Can Comment: Yes
Signature required: No
Agenda available: No
Comments viewable by: Every user (login not required)

Decisions
Required for approval: 100%
Additional requests: hold, cancel, custom route, suspend
If rejected, return to: Previous Step

Deadlines
Deadline: No
Reminders: None

Signatures

If your administrator chooses to require a signature, they will be recorded on the signature tab when a user makes a decision on a proposal. Depending upon the settings – a user may provide their signature in one of two ways. They may either provide it via a signature pin, or through a paper document that is scanned and uploaded. Both types of signatures will be recorded in the signatures tab, and if the paper signature is used, it will be available for download.

As a best practice, we recommend using the signature pin.

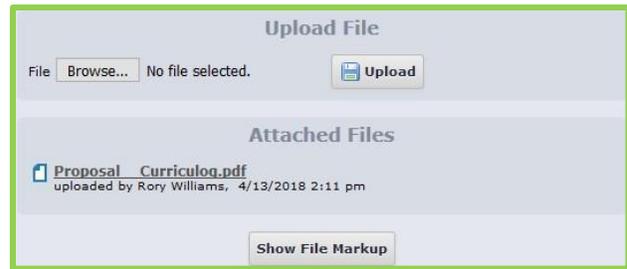
Signatures	
Step	Status: <i>Approved</i>
Diana Prince	04/13/2018
Rory Williams	04/13/2018
Proposal Curriculog.pdf	



Files

The Files  tab will allow you to attach documentation relevant to your proposals. Any user who is an active participant on a step may upload files to a proposal, and although the maximum file size limit is 20 MB for each file – there is no limit to the number of files that may be attached to the proposal.

Once files have been attached, they will be visible to all users. The file markup will indicate who uploaded each file and when through an activity log.

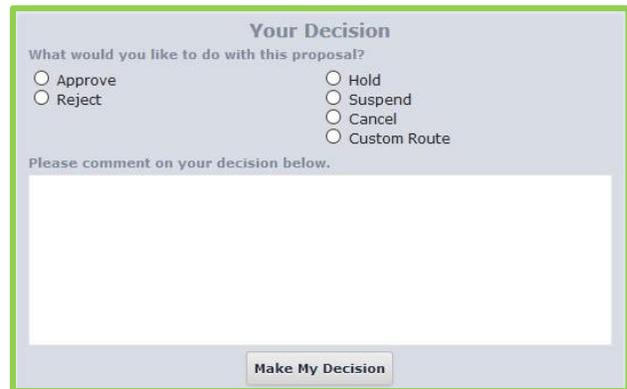


Note: In older versions of browsers, uploading files as attachments that contained spaces in the file names may have resulted in difficulty when downloading the file later. Although newer versions of browsers are no longer experiencing this issue, as a best practice, when uploading attachments, we recommend that you ensure there are no spaces in the file name.

Decisions

Once you have completed your work on the proposal and you are ready for it to move to the next step, you will need to enter a decision. To provide a decision, select the Decisions tab  from the Proposal Toolbox.

The decisions that are available to you will vary based on the settings your administrator has selected for each step, but this manual will cover all options available.



- **Approve** - Selecting Approve is indicating that you are approving the proposal in its current state and are signing off on it to move to the next step in its workflow. If you are the only participant on the step, the proposal will advance automatically. Entering a comment is optional when selecting Approve.
 - If you are **not** the only participant on the step, and the step requires 100% approval in order to advance, then the step will wait until all participants unanimously agree to approve or reject.
 - If you are **not** the only participant on the step, and the step requires any other threshold lower than 100% approval in order to advance, the proposal will remain on the step until all participants have voted even if it has received enough votes to be approved. This means that if the vote is set to require 75% approval and three of the four participants have already approved, the proposal will remain on the current step until the fourth participant makes a decision.
 - If this is a committee step but you are a non-voting member, the step will not move on until the Agenda Administrator has placed their decision.

- If this is a committee step and you are the Agenda Administrator, when you place the decision to approve the step – you will be placing it on behalf of the committee and it will advance to the next step.
- **Reject** - Rejecting a proposal indicates that you are not approving of it in its current state. You will be required to enter comments in order to submit the decision to reject, and as a best practice we would strongly suggest using the comments to explain the reasoning behind submitting a rejection. Depending upon the settings an administrator chooses – a proposal may take one of two paths when it has received a rejection.
 - **Originator** – If the originator chooses to send a proposal back to the originator, the proposal will create a new step titled ‘Originator’, followed by each step from the beginning. This effectively causes the workflow to start over.
 - **Previous Step** – If the originator chooses to send a proposal back to the previous step, the proposal will return to the previous step only and then resume the normal workflow.
- **Hold** - Submits a request for the proposal to not advance in the workflow. The request is sent to the administrator, who will approve or reject the request. If the administrator approves the request and places the proposal on hold, 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. This would typically be used to ask for additional time for revisions on a proposal when a deadline is approaching, as the item will not trigger the deadline when it has been placed on hold. Only an administrator can lift the hold on a proposal.
- **Suspend** - Submits a request for the proposal to be suspended from the workflow. Like the request for ‘Hold’, it is sent to the administrator, who will approve or reject the request. If the administrator approves the request and suspends the proposal, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed.

***Note:** In the case of both Hold and Suspend, if you were to place a proposal on either status after it had been in progress for 6 days, and it had an upcoming deadline after 10 days – and the proposal stayed on its status of Hold or Suspend for another 10 days – the day that you return it to the workflow the deadline will trigger as it has now passed its original 10 day deadline.*
- **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. If the administrator approves the cancel request, the proposal will be referred 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. This is the only way you can delete a proposal after it has been launched.
- **Custom Route** - A Custom Route is an additional ad hoc step outside the steps in the approval process that the administrator originally provided and require administrator approval. They will allow you to invite additional users or committees into a workflow for additional feedback. Custom Routes are covered in more detail in the next section.

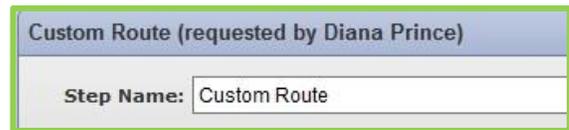


Custom Routes

Custom Routes  do have a tab within the Proposal Toolbox where you will establish your Custom Route, but starting them begins as a decision.

To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab, and then select “Make My Decision.”

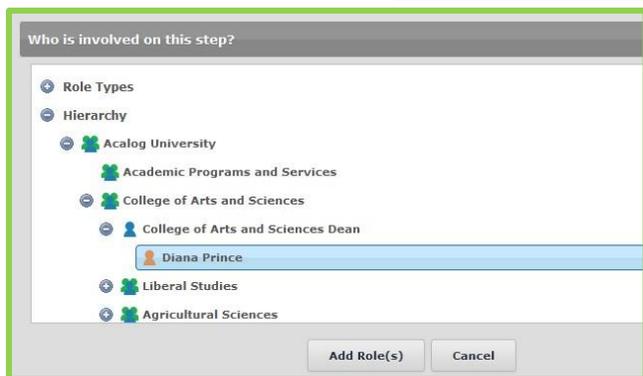
This will direct you to the Custom Route tab to configure the options for your Custom Route. The first option available will be for you to decide if you would like to re-name the step. It will default to “Custom Route” but if you would like to change it you can click in the field and replace the text.



The next option is to indicate who you would like to bring in to the workflow by choosing the participants. Select the grey arrow to the left of “Participants” and the option will expand. Select “Add Participant”.



This will launch a new window titled “Who is involved on this step?” and will display two options initially – Role Types and Hierarchy.



In most cases, when adding a participant to a Custom Route, you would be looking for a specific user. To locate a user, you can use the  symbol to expand Hierarchy, then again to expand a specific entity, and then a role until you see the user. Click on the user – or users - to select them and their row will be highlighted blue. Next select “Add Role(s)”.

Note: When creating a Custom Route, you can only select a user if they already have a role within the Hierarchy. You will not be able to search the User Accounts module.

Once the users have been added, they will be listed on the step under “Participants.” If you need to remove a user, you can click “Add Participant” again, then click the user you would like to remove which will remove the blue highlight from their name and click “Add Roles” again and the user(s) will be removed.

Note: You may also choose users based on Role Types; however, the users that are brought into the proposal will be based on the Hierarchy selection made on the form at launch.

Once you have determined the participants for the Custom Route, the next step will be to determine what they will be allowed to do by setting the Rules. To view the options available under Rules, click the arrow to the left to expand the section.

There are four options you will need to determine within the Rules section.

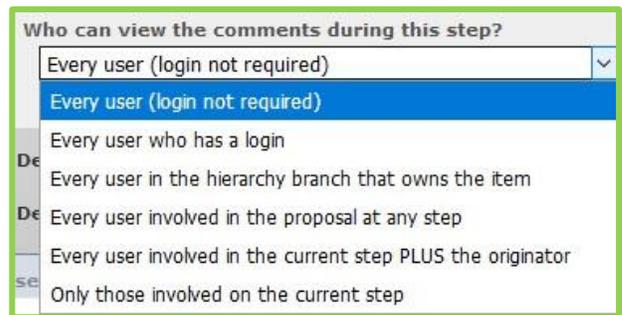
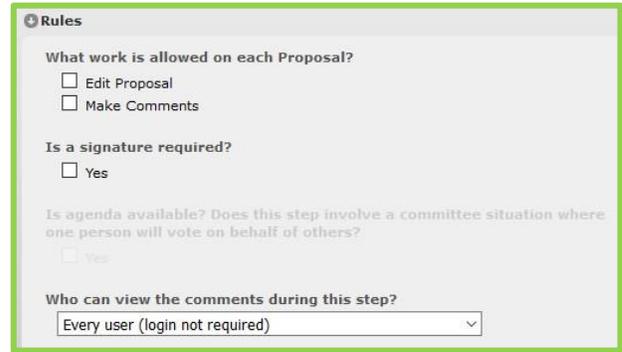
First, you will need to decide if the users you are bringing into the proposal on Custom Route will have the ability to edit the proposal and/or make comments. When making this decision, consider the reason for the Custom Route: it may be that you only need feedback from another individual and a comment is sufficient – or it may be that you need to extend editing rights to a new committee.

Next, you will need to decide if this step requires a signature from the user. If you require a signature from a user, they will need to enter either their signature pin or provide a scanned paper copy of their signature in order to approve the step.

The next option is related to committees – and is only available if you have chosen a role type associated with a committee as your participant. If this option is available and selected – it indicates that this step will function as a committee step; the user elected as the Agenda Administrator will vote on behalf of the group and be able to create an Agenda as needed. If you’ve not selected a role type associated with a committee – this option will not be accessible.

The last option is a drop-down menu allowing you to determine who may view comments made during this step. You may allow all users (including guests without logins) to view comments or you may restrict it to one of the other options available from the drop-down menu.

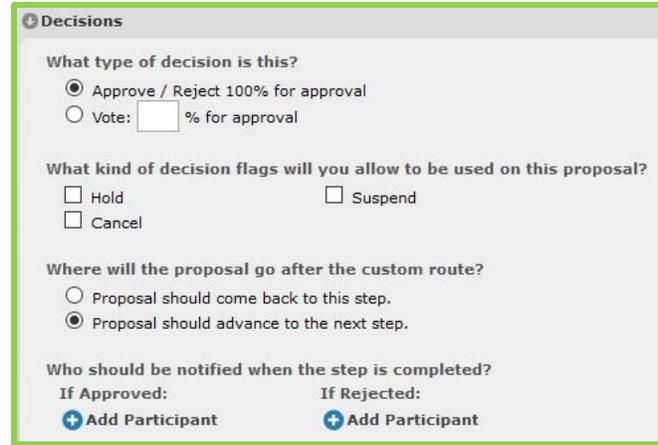
Note: The transparency level of the system selected by the administrator may override the setting you select here. For example, if the administrator sets the transparency of the system to Restricted and you set the step to Every User – the Restricted settings will override the Every User settings.



The Decisions section is where you will determine the types of decisions users can provide, and the direction the proposal will move in.

The first option indicates the type of decision and provides two options:

- Approve / Reject 100% for approval** – This option indicates that all users on the step must come to a unanimous decision for the step to be approved or rejected. If all users provide a decision and it is not unanimous, the step will not advance until users either change their votes to reach 100%, a deadline is reached an automatic decision is triggered, or an administrator force approves/rejects.
- Vote: ___ % for approval** – This option indicates that a threshold must be reached for the step to advanced, **however it still requires that all users on the step provide a decision**. For example, if the step has 4 users, and the threshold is set to 75% - then only 3 of the 4 users must vote “approve”. If 3 of the 4 log in and vote right away – the step will **not** advance to the step immediate. It will wait and allow the fourth user the opportunity to log in, review the proposal and changes, provide comments, and provide a decision – even if their decision cannot change the outcome. Only when all users on the step, **and** the vote threshold have been reached will the step advance.



The next option allows you to offer decision flags to the users on the Custom Route, which will provide the users on this step options on their decision beyond Approve and Reject. The options that you can offer users are limited to Hold, Cancel, and Suspend – you will not be able to provide Custom Route as an option from a Custom Route. You can read the full descriptions for the decision options under the [Decisions](#) section.

Note: You will only be able to create one Custom Route per step, and you may not create a Custom Route from within another Custom Route.



The next option determines the path the proposal will take once the Custom Route has been approved. There are two options available and the path you choose will vary based on your needs for the Custom Route.

- **Proposal should come back to this step.** This option is often chosen when the reason for a Custom Route is to invite a feedback loop. When you select this option, the proposal will advance to the Custom Route step when the administrator approves it. Once the Custom Route step has been completed and approved, it will return to you for further revisions and a decision. Once you provide your decision, it will then advance to the next step in the workflow.

Note: You cannot create an additional Custom Route as a decision, as you may only create one per step.

- **Proposal should advance to the next step.** This option is often selected when you are inviting a user into the workflow to make additional changes or comments and allow the workflow to progress after with no additional revisions on your part. This means that once the administrator approves the request for a Custom Route, you will still need to complete your step by providing your final decision. At that time, the proposal will move on to the Custom Route, and then on to the next step in the workflow.

The last option on the Decisions tab is an **additional** notification that you can choose to provide, if the proposal is either approved or rejected. This notification is in addition to the one automatically sent to the users on the step and may be different based on the approval or rejection. To add a user to send a notification to, click on “Add Participant”, then use the  to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.

The last section of the Custom Route that you can set is the Deadlines/Reminders option. This option allows you to set a number of days to be allowed for the step before an automatic action will occur and you can choose if reminders are to be sent to the users involved on the step.

The first option is for setting a deadline on the step. A deadline is a threshold set in a number of days for the step; and if that threshold is passed an automatic action will occur. If you would like to set a deadline, check the box labeled “Set Deadline.”

Deadlines/Reminders

Would you like to set a deadline for this step?

Set Deadline

Move Step after days.

Send reminder days(s) before deadline.

What should happen if the deadline passes?

Automatically Reject

Automatically Approve

Who should you notify when the deadline is passed?

Not Applicable

Would you like to set a timed reminder for this step?

Send every days(s).

Send after days(s).

Once this has been checked, the next two options become available.

- **Move Step after ___ days.** This requires a whole number to be entered – for example “30.” Once 30 calendar days have passed with no decision on the step, this deadline will be triggered.

Note: *Curriculog does not observe holidays or weekends and will continue to count towards the deadline.*

- **Send reminder ___ day(s) before deadline.** This will also require a whole number to be entered, and ideally a smaller option than one that was used for the deadline. If your deadline was set to 30 as our example above, then perhaps this option may be set to “15”. On the 15th day on this step with no decision, a reminder will be sent to the user that the deadline is approaching, and they need to take action to avoid the automatic decision.

The next option is to choose which of the two automatic actions should occur when the deadline passes. If either of these actions were to occur, the step will follow the path the administrator has outlined. For approvals, this means advancing to the next step of the workflow. For rejections, it may either return to the originator or return to the previous step.

- **Automatically Reject**
- **Automatically Approve**

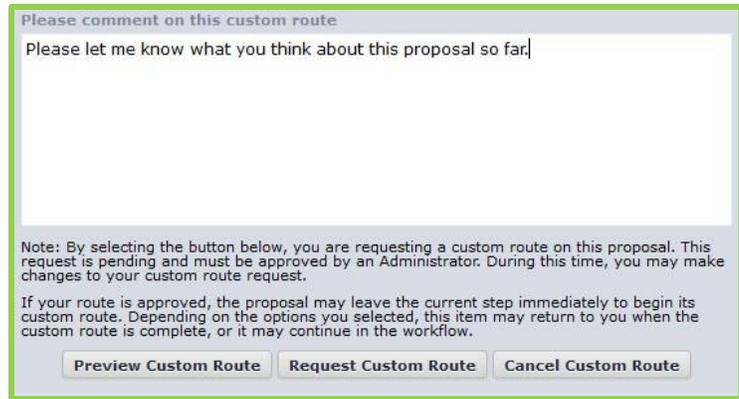
You may also add users to be notified if the deadline passes without action. This notification is in addition to notifying those on the step and separate from the approve/reject notification. To add a user to send a notification to, click on “Add Participant”, then use the to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.

The last option of the Deadlines/Reminders section will be to include timed reminders. These reminders may be sent to the users of this step regardless of if you choose to use the deadline feature.

- **Send every ___ day(s).** This option requires a whole number, for example, “10”. This would send a reminder to the user every 10 days until the step has received a decision.
- **Send after ___ day(s).** This option requires a whole number, for example, “5”. This option would send a reminder to the user after 5 days have passed with no decision having been provided on the step.

After selecting all the options associated with your Custom Route, you will be required to enter a comment. The comment is usually used to provide explanation to the user being invited and requires a minimum of two characters to be entered.

Below the comment box are three buttons:



- **Preview Custom Route** When you choose to preview the Custom Route, the step will collapse and show you the step as if you were the user who will be receiving it. You will be able to review all the selections you have made on the Custom Route, and if you are unhappy with any of the selections – you can choose to edit it further by selecting “Edit Custom Route” at the bottom.
- **Request Custom Route** Selecting Request Custom Route will send this request to the administrator for review. The Custom Route will remain as pending until the administrator has either approved or rejected the request. While this is pending, you can continue to revise the proposal. Once it has been approved – depending upon your selections within the Custom Route, it may advance to the Custom Route immediately and be returned to you later – or it may continue in the workflow.
- **Cancel Custom Route** If you decide you no longer want to proceed with the Custom route, you can choose this option to cancel and continue working on the proposal and provide your decision.

Crosslistings

Crosslistings are a way to tie course proposals together based on information they share across one or more fields – for example, when two courses may share the same code, name, description and credits but are housed within two different departments and so have a different hierarchy and prefix. The crosslisting functionality within Curriculog will allow you to create multiple proposals based off a single primary proposal - allowing you to update those shared fields in all crosslisted proposals with modifications just to the primary.

The administrator will determine when the crosslisting functionality will be available, and it will only be available within course approval processes. If your administrator has made crosslistings available, you will see the crosslisting icon  appear to the left of the approval process's title.



Note: The crosslisting icon indicates the crosslisting functionality as an option. Although it is available for use within these approval processes, it is not required that you create a crosslisting each time you select this process.

To create a proposal with a crosslisting, you will begin just like any other proposal. For more details on starting a new proposal, see the [New Proposal](#) section.

Note: If you are importing information into your proposal from an external source, you will only be able to import information into the primary proposal. You will not be able to import into any of the crosslistings.

Rev. [9/2018]

Proprietary & Confidential



The initial form that is being filled out will be referred to as the primary; and all crosslistings created within this proposal will be based on the information provided within this primary proposal.

Once all the fields have been filled out, **before** launching the proposal, you can select the crosslistings icon  from the Proposal Toolbox and select “Add Crosslisting.”

Note: Crosslistings must be added to a proposal prior to launching. Once they have been launched, you will not be able to add additional crosslisted items.

Once you have selected Add Crosslisting, the second proposal will appear listed below the primary with the crosslisting icon  and the additional text of (crosslisting) added to the title. You can add multiple crosslistings to this proposal by selecting “Add Crosslisting” as needed.

To remove any crosslisting from the list, select the blue “X”  icon to delete it. To edit any crosslisted proposal, select the edit icon  for that crosslisting.

When editing a crosslisting proposal, you will find that some fields are greyed out and already contain content. These fields are prepopulated with information from the primary proposal and you will not be able to modify the contents of those fields within the crosslisting.

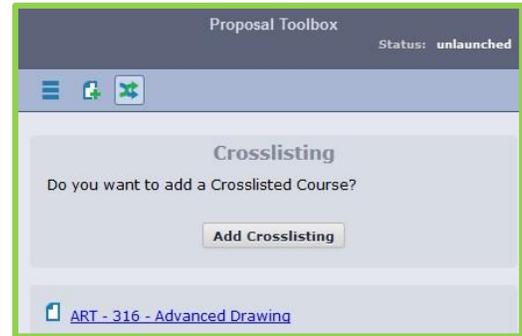


These fields are selected by the administrator and will be the same on each crosslisting associated with this primary – modifications to the content of these fields can only be made by returning to the primary proposal by selecting the primary icon  in the upper left corner. From the primary, you can return to the crosslisting by selecting the crosslisting icon  from the Proposal Toolbox and selecting the crosslisting again.

As with any proposal, all fields marked with an asterisk in a crosslisted proposal must be filled in and users must be present on each step of the workflow prior to being able to launch. Changes will need to be saved using the “Save All Changes” icon found at the top of the page, or the floating button found at the bottom of the page prior to navigation away from the page.

When you are done working within the crosslisting and you are ready to launch the proposal, you will need to return to the primary proposal, using the primary icon  in the upper left corner - the same location as the launch icon. When you launch from the primary, you will also launch all crosslisted proposals associated with it at the same time.

Depending on the settings the administrator has selected, when you launch the proposals it may first be sent to the administrator for review prior to entering the workflow. The administrator will receive notification and an opportunity to review the primary and all crosslistings and may choose to approve or reject them.





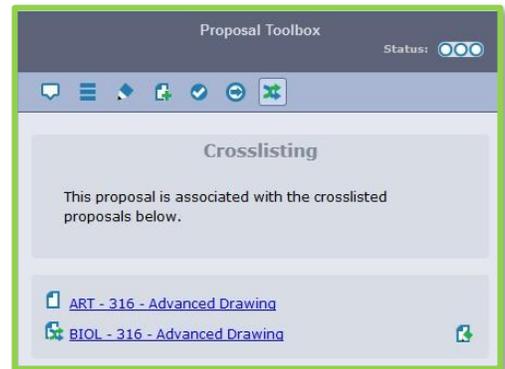
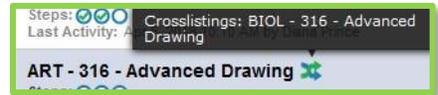
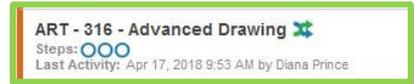
Once launched, they will appear in the tasks window as separate proposals and will follow the steps of their workflows as laid out by the administrator.

When viewing tasks that contain crosslistings, you will see the crosslistings icon  appear to the right of the name of the proposal. Hovering over the icon will indicate the related proposals and their relationship.

When editing the proposal, selecting the crosslisting icon  from the Proposal Toolbox will display all associated proposals allowing quick access to each of them. You may or may not be able to work on the crosslisted proposals depending upon the settings of their workflows.

All fields within the primary will be editable, and any edits made to linked fields will automatically update within the crosslisted proposal. Linked fields in the crosslistings will be unable to be modified.

Note: User tracking will record all changes made to the primary and crosslisting proposals; however, changes to the linked fields are only recorded on the primary proposal as that is the only proposal in which changes have actually occurred.



AGENDAS

The Agendas module provide functionality to create a meeting agenda for discussing proposals that require a committee as a part of the approval process. A committee may be made up of several individuals which Curriculog will split into two groups: non-voting members and Agenda Administrators.

- **Non-voting member** Users on the proposal may edit or comment if the step allows, however rather than providing a decision you are providing an opinion. You may place the opinion to indicate your preference for an approval or a rejection, however your vote is not counted towards the final approval or rejection. Only users serving as the Agenda Administrator will have their votes counted.
- **Agenda Administrator** If you are designated as an Agenda Administrator, your name will appear with an asterisk beside it on the step and you will now be responsible for placing a vote on behalf of the committee and have the option for creating an agenda if one is needed. Non-voting members may place opinions on the step, but only the votes of the Agenda Administrator will be counted. There may be more than one Agenda Administrator on a step if the administrator chooses, and in that case all users designated would be required to vote for the step to advance.

Note: An Agenda Administrator does not have all the rights and permissions of a system administrator and will not have access to the Administrator Dashboard.

Only Agenda Administrators can create, edit, publish and make decisions upon an agenda, and only when a proposal has reached a committee step.

When you navigate to the Agendas Module, you will see four tabs available across the top:

- **My Agendas** This tab will house Agendas that you have created and are still in progress or are completed but not yet marked as archived.
- **All Agendas** This tab houses Agendas by all users that are still in progress or are completed but not yet marked as archived.
- **My Archived Agendas** This tab houses all Agendas that you have created that are completed and marked as archived. Marching them archived moves them to this tab to be housed indefinitely to alleviate clutter on the My Agendas or All Agendas tab.
- **Archived Agendas** This tab houses all Agendas by all users that are completed and marked as archived. Marching them archived moves them to this tab to be housed indefinitely to alleviate clutter on the My Agendas or All Agendas tab.





On each tab, you will see 10 Agendas at a time listed. You can use the “Next 10” or “Previous 10” to navigate through the list. Each row will indicate the name of the Agenda, the number of proposals included, the date it was created, and the name of the Agenda Administrator who created it.



If the Agenda is open, still has active proposals and you are the Agenda Administrator who created it, you will see three icons when hovering over the name of it: View Agenda Summary , Edit Agenda , and Print Agenda .

View Agenda Summary will provide a flyout on the right side of the screen allowing you to view an overview of the Agenda including the name, current status, committee involved, associated notes, and attached proposals.



Print Agenda will launch a new window containing a print friendly version of the Agenda. This view will feature the details of Agenda and forms of each attached proposal.

Edit Agenda will return you to the Manage Agenda screen. The upper right side of the screen contains a print icon  and a help icon , and the upper left may contain the unpublish icon  or the Complete Agenda icon . You will not be able to change the name, committee, status, or created by options of a published Agenda but you are able to edit the notes field. This will allow you to use the notes field to enter relevant details from discussions surrounding your proposals, or minutes from a meeting.

At the bottom you will find a list of all attached proposals. Hovering over them will provide the View Proposal Summary  and View Proposal  icons and clicking anywhere in the row will expand the proposals summary in the right pane to allow for a quick review. Although you can navigate to the proposal using the View Proposal  icon in the event changes are needed – you are also able to provide decisions directly from the Agenda by hovering over the decision drop-down arrow. This will provide you with all available decision options on the step



The unpublish icon  will only be available on Agendas until a decision has been made on at least one of the attached proposals. If no decision has been provided on any proposal, you can select this icon to change the status of the Agenda back to unpublished, allowing you to modify the proposals that have been attached, the Agenda’s name, or the committee associated. Once a decision has been provided for any attached proposal, this icon becomes the Complete Agenda  icon. When the Complete Agenda icon is selected, any proposals without a decision will be removed from the Agenda to be able to be included in other Agendas; this Agenda becomes completed, and you will have the option to archive the Agenda.

Note: There is no option to delete Agendas once at least one decision has been provided on them.



Create a New Agenda

The Agenda Administrator will have the ability to create a new Agenda when a proposal has reached a step in their workflow that is a committee step. To create a new Agenda, you will need to navigate to the Agendas module and then select “New Agenda.”

The next step will be to fill in the form for the Agenda, starting with the Agenda name. This is typically the name of the meeting being held or named after the committee conducting it. Once the agenda name is entered, click “Add Committee.” The new window will provide a list of all eligible committees. A committee will be considered eligible if you are the Agenda Administrator for that committee. Once your committee is selected, click “Done Selecting Committees” to add it to the Agenda.

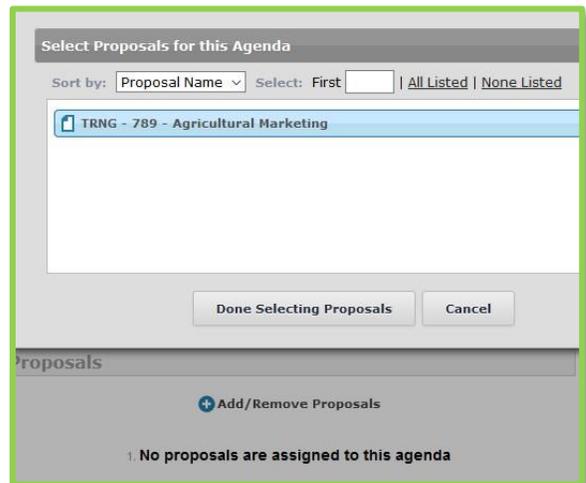
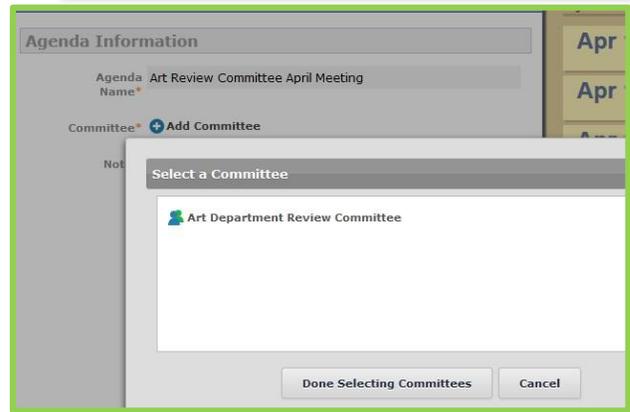
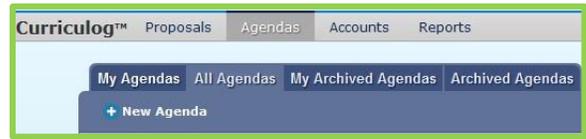
The notes field allows you to enter notes for this Agenda. You may choose to include additional information that may be covered in this meeting or notes about when and where it should take place.

Note: Although there is no limit to the amount of text you can place in the notes field, there are no attachments available within the Agendas.

Next, click on Add Proposals to add the proposals to the agenda for review. A dialogue box will open displaying any eligible proposals.

Select the proposals to add to the Agenda and then click “Done Selecting Proposals.” The proposals will now appear in the Proposals section of the Agenda. You may view the Proposal Summary  or the Proposal  from the appropriate icon displayed when hovering over the proposal within the Agenda.

Publishing the Agenda will make the Agenda available to all users within Curriculog and will include a link on the current step of each proposal currently associated with the Agenda. To publish the agenda, navigate to the icon  in the upper left.



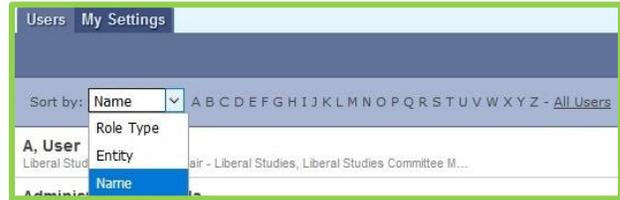


ACCOUNTS

Users

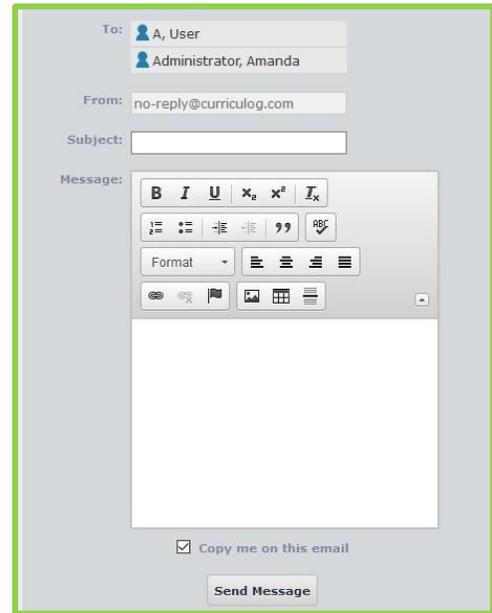
This tab will display a list of all users within Curriculog. You can sort results by Name, Role Type, or Entity using the drop-down menu in the upper left.

- **Name** Sorts users alphabetically by last name
- **Role Type** Sorts users based on the role types that have been assigned to them by the administrator. For example, department chair.
- **Entity** Sorts users based on the hierarchy entities in which their roles fall. For example, if Diana Prince is the Art Department Head then selecting the Art department as the entity would return her user account.



You can also use the alphabet links to filter the list of users displayed. Selecting a letter will jump to the first section of users whose last name begins with that letter. Users will be displayed ten at a time on the page, and you can use the “Next 10” or “Previous 10” options at the bottom of the page to scroll through them.

When hovering over a user, a Send Message icon  will appear to the far-right end of that row and indicates that you may send a message to that user. When you select the icon, a flyout will appear in the right pane with the user’s name populated in the “To” field. You may choose more than one user to send a message to at a time. The “From” e-mail will be auto-generated by the system and cannot be modified. You can provide any subject or message, and if you would like a copy of the e-mail to be sent to you – be sure to click the checkbox for “Copy me on this email” at the bottom before clicking “Send Message.” When the e-mail is sent a copy will not be maintained within Curriculog.



When you select a user’s name from the list, the flyout on the right will display the user’s personal information including their first and last name and e-mail address, and any roles or committees that have been assigned to them by the administrator. You will not be able to modify another user’s account in any way unless you are an administrator.



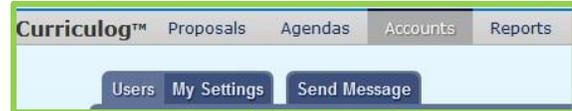


My Settings

My Settings will allow you to review the settings for your own account. You can access this information in two ways: you can either hover over your name in the upper right corner of Curriculog and choose “My Settings” from the drop-down, or you can navigate to the Accounts module and choose the “My Settings” tab.



This tab will populate only your user account in the left pane, and when you select it you will see your information appear in the flyout on the right.



The first portion, Personal Information, will contain your first and last name, e-mail address, and password information. You will be able to change any of this information on your own account at any time. If you make any changes, click “Save Personal Information.”



Note: If you are using remote authentication or SSO to provide credentials to log in to Curriculog, you must ensure that any changes you make match your on-campus provider. If you are unsure, please see your administrator

The next section will detail the roles that have been assigned to you. Roles are listed first, and any committees you may serve on will be listed after, and if you are an Agenda Administrator it will be noted with an asterisk. You will not be able to modify any of the roles that have been assigned to you.



The last section will be User Rights and will indicate some permissions you will have within the system as well as notification and signature preferences.

The first portion will be labeled “Permissions” and will be set by the administrator.

- **Can Originate Proposals** This setting indicates that you will be able to act as an originator and create new proposals.
- **Can Import** This setting allows you to import content when creating a new proposal.
- **System Administrator** This setting indicates whether you are a System Administrator. System Administrators have the highest level of authority across the Curriculog system and cannot be restricted in any way.





The next three options will pertain to preferences regarding notifications.

Originator	Get all messages for user's proposals
Email Options	Weekly Email Digest
Process	Send messages for the steps in which I am involved or

- **Originator** This setting controls how often you will receive notifications for proposals you have created.
 - *Receive all messages for User's proposals* – You will receive notifications for all actions taken on proposals you originate.
 - *Receive messages for comments only for User's proposals* – You will receive notifications when there has been a comment on a proposal you originated.
 - *Receive messages for comments and edits only for User's proposals* – Users will receive notifications when there have comments or edits on a proposal they originated.
- **Email Options** Determines how often emails from Curriculumlog will be sent. Choosing the “All Emails” option will send an email to you each time a notification is triggered. The other options will send a digest of all notifications that occurred since the last email; and digest emails are sent out each night at midnight UTC. As a best practice, we recommend using the digest option because Curriculumlog generates a lot of notifications that could quickly fill a user’s inbox if “All Emails” is chosen.

Note: All notifications will still appear on the User and Admin dashboards as they are triggered even if a different digest option has been chosen for the emails.

- **Process** Determines how often you will be included in notifications for proposals that you are a part of on at least one step.
 - *Send messages for the steps in which I am involved only* – be notified only for steps that you are directly a part of.
 - *Send messages for proposals in which I am involved only* – be notified for actions on all proposals you are involved in, even if you’re not involved on the current step.

The last two options indicate the preference for how the signature pin will be provided should it be required on a step, and a way for you to view your provided pin.

Signature Steps	Use Electronic PINS for signature steps
Signature Pin	View Pin

- **Upload paper signatures for signature steps** – The proposal will provide you a print friendly document to sign and upload to the proposal.
- **Use Electronic PINS for signature steps** – Personal identification numbers given to you to use in place of a paper-based signature; this is recommended as a best practice.

Note: Note all options may be available for you to modify. Your administrator may choose to override some options at the system level.

REPORTS

The Reports Module allows the you to generate reports on proposal activity within Curriculog. The reports available to you are determined by the administrator. Once a report has been selected, the results will be delivered via e-mail and available for 5 days.

Note: You will need to be logged into Curriculog to open a report. If you are not logged in when you click the link provided in your e-mail, you will be prompted to log in before the file will download.

To generate any report, select the report you wish to run, then select the criteria you wish to filter on. Below is a list of reports that can be run. Global Reports will be available in both HTML and CSV format, while Detail Reports will only be available in HTML format.



Global Reports

Pending Proposals Report - provides a list of all proposals within the system sorted by status.

User Activity Report - provides a detailed view of a single user's participation within Curriculog by proposal, including comments, edits, decisions and time spent.

Aging Report - provides a list of all active proposals sorted by the greatest time in the system.

Bottleneck Report - provides a list of the largest lag times for changes by user, role and entity (such as department).

Detail Reports

Proposal Detail Report - provides the complete details of a single proposal, with the ability to include a summary of user activities (edits, comments, decisions, time), comments, import source, files and crosslistings.

Proposal Progress Report - provides the history of a proposal (its steps) in a flow diagram with user activity including comments, edits, time and decisions.

Impact Report - provides all dependent elements of the curriculum for an item, such as prerequisites, corequisites, crosslistings, programs and campuses. This will look for any reference of the course – whether it is a permalink, dynamically linked into a program, or plain text within the description.

Note: Results of the Impact Report may look surprising in how thorough they are. For example, a search for a course may provide a program in the results – even though the course does not appear to be listed in the programs description or dynamically linked at first glance, because it is listed as a prerequisite to one of the dynamically linked courses within the program!

Historical Change Report - provides the change log of all proposal versions of a curriculum item over time.

Note: There are additional reporting options available using the Curriculog Reporting API. For more information, please contact support@digarc.com.

Rev. [9/2018]

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HELP

In the event you need assistance, Curriculog has a built-in help available in two ways: a help form and Curriculog University.

At the very bottom of the Curriculog system, from any page, you will find two links available to you.

The first one will be “Contact System Administrator.” This will launch a short form that will direct your inquires to your System Administrator and may be used for any questions regarding your use of the Curriculog system.

The second link will direct you to “Curriculog University”. Curriculog University is an online resource that allows you to quickly search through an online User Manual, Knowledge Base, Video Library, and Frequently Asked Questions section for additional information about the use of Curriculog.

You will also find information about our newly introduced Community feature, where you can engage with our other Curriculog clients to see how they’ve been using the system within their own Institutions.

[Contact System Administrator - Curriculog University](#)
Curriculog © 2018, [Digital Architecture](#)
v1.23.0

If you need assistance using Curriculog or have encountered a system error, please fill in the following support form. Your system administrators can assist you.

Question*

Details*

Url

Name*

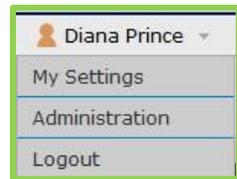
Email*



Administration

The Administrator Dashboard is the home page for administrators within Curriculog and its goal is to separate the administrative functions from a user’s daily tasks – as an administrator may need to function in both roles

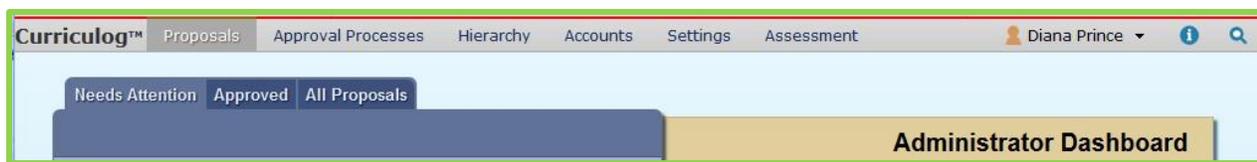
To access the Administrator Dashboard, select the arrow to the right of your name in the top right corner of the screen and select “Administration” from the drop-down.



Once you have accessed the Administrator Dashboard, you will notice the bar across the top of the navigation menu has changed from blue to red. This will serve as one of the visual indicators that you are now viewing the Administrator Dashboard, and as long as you are functioning as an administrator within the system, this bar will remain red.

From the Administrator Dashboard, you will be able to manage the settings of the Curriculog system, create approval processes, and configure the integration. If you find that you need to create proposals, or act on a step as a participant, you will need to return to your User Dashboard. You can get back to the User Dashboard at any time by selecting “My Dashboard” from the drop-down menu, which now replaces “Administration”, or by clicking “Curriculog” in the upper left corner of the screen. You can toggle between the two dashboards as often as you need to.

Across the top of the page you will find a persistent toolbar, where you can access the “Proposals”, “Approval Processes”, “Hierarchy”, “Accounts”, “Settings”, and “Assessment” Modules. In the upper right corner, there are options for your own user account listed below the drop-down menu giving you options for “My Settings”, “My Dashboard” and “Logout”; followed by a “Help”  and “Search”  icon.



Note: If you do not see the Assessment module listed across the top, the module has been disabled. You can enable the module within the Settings, under Assessments if you would like to turn them back on.



When you are logged in as an administrator, floating near the bottom left corner of every page within the system you will find a green button that reads “Support.” Clicking on this button will open the support widget, allowing you to contact us by filling out a short form regarding any questions you have while working within the system.



Entering a support ticket may only be done by administrative level users and will be sent directly to our Client Care team. Our Client Care team works tirelessly to respond to inquiries as quickly as possible during our regular business hours of 8 AM to 5 PM Eastern Monday through Friday; but will also respond to emergencies after hours, on weekends, and on holidays as needed. To ensure the fastest possible response, please be sure to provide as much possible detail in your ticket to allow the team to research and provide a solution as efficiently as possible.



At the bottom of the page, a link will direct you to “Curriculog University”. Curriculog University is an online resource that allows you to quickly

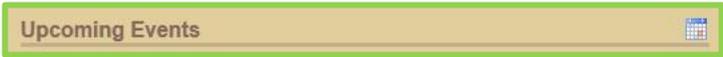
search through an online User Manual, Knowledge Base, Video Library, and Frequently Asked Questions section for additional information about the use of Curriculog.

You will also find information about our newly introduced Community feature, where you can engage with our other Curriculog clients to see how they’ve been using the system within their own institutions.





The right pane will display your Recent Notifications and Upcoming Events, which function the same as they do on the User Dashboard.

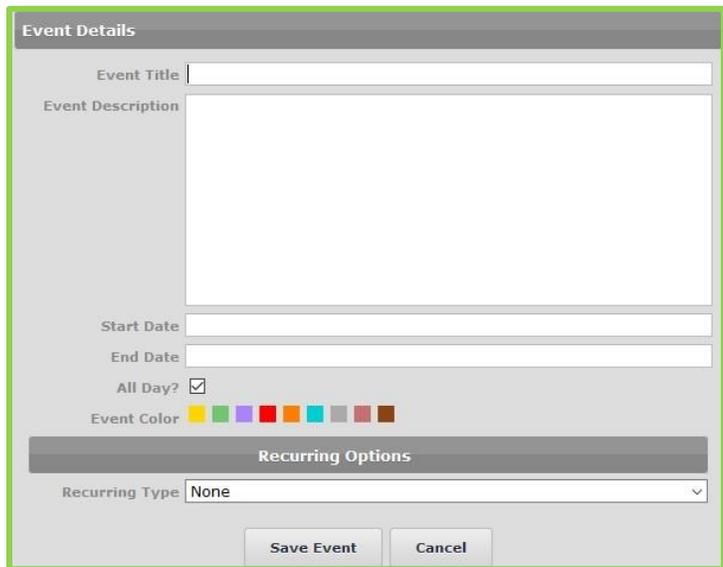


In addition to being able to view the calendar of upcoming events, an administrator can add events to the calendar. Events that have been added by the administrator will appear on the calendar for all users in the system – it is not possible to display items on a single user’s calendar. To add an event, click the View Calendar icon .

The calendar for the current month will appear with a link in the upper left corner to “Add Event”.



Clicking “Add Event” will open a dialogue box with options for the event. You can enter an event title which will display on the calendar and on the upcoming events tile on the dashboard, and a description that will display when the event is expanded. You can then choose start and end dates; and if the event should occur at a specific time rather than an all day event – you can uncheck the “All Day” checkbox. The event color options will change the colors on the calendar itself, although it will not have an impact on the tiles on the dashboard. If you need for the event to reoccur you can select a frequency. After making all changes, click “Save Event”.



Note: You will only be able to add events to the calendar from the Administrator Dashboard.

SETTINGS

The Settings module will contain several tabs for configuring various aspects throughout Curriculog. It is important to understand the settings and their relationship to elements throughout the system as decisions made here may override settings in other areas.

Integration

The Integration tab allows you to establish a connection between Curriculog and either your Acalog database or your external software using Integration Manager, which is required to import information.

Integration Manager is a product designed by Digarc to move data between systems. Not only can it move information between Acalog and Curriculog, but it can also move information to and from an external system – although this manual will focus on moving information just between Acalog and Curriculog.

Integration Manager is a caching engine; it can store information within the DataStore for easy retrieval.

The first time you run a task through Integration Manager, it may take some time to import your entire courses database. However, once it has done so, that information is “cached” and can be retrieved much more quickly.

Note: This manual will detail setting up maps and legends within the Curriculog system to import information; but additional information on using Integration Manager can be found on Curriculog University, under the User Manual section, under Integration Manager.

Maps

To start the process of importing any information for use within Curriculog, you must establish a Map. From the flyout you will see two sections - the first one titled “Prepare External Systems for Integration with Curriculog.”

The first step of this process will be to establish the map within Curriculog. This will inform Integration Manager what reference system to use (Acalog in this case), so it can go get the information to cache within the DataStore.

Start by selecting “Map External Systems.”

This will bring up a new window where you will be able to select “Create New Map.”

Integration Settings

Prepare External Systems for Integration with Curriculog

Follow these steps to import information from external software into Curriculog proposals:

1. Create a **map to the external system's** data (you will map this to a Curriculog Approval Process later).
2. Once you have a map for the external system, you must **sync that system's data** by creating a task. You can schedule a task that will sync the external system's data, ensuring you have the most current curriculum information available for proposals.

Map External Systems
Sync External Systems

Integration Manager Maps

The first step to import information from external systems into Curriculog proposals is to map the external system's data. You may edit an existing map or create a new map to your existing external system data.

Current Maps:

Acalog

- 2017-1027 College Catalog 2017-2018 Backup Curriculog Transition
- College Catalog 2018-2019 Curriculog Copy

[+ Create New Map](#)

Note: Only one window of Integration Manager can be open at a time, so if it appears to not open, check your task bar to see whether the window may have been minimized. Any previously created maps will also be visible on this screen.

Next, you will need to indicate the external system that you will be gathering data from – in this example, Acalog.

Once you have selected the reference system, you will need to indicate the catalog you would like to map.

Once the catalog has been selected, map the fields from your External System that will be brought into Integration Manager. You can click “Map Fields Automatically” and it will automatically grab all the information related to your programs, shared cores, and courses within Acalog.

Next, you will need to specify the unique item identifier. This helps the system to keep track of each individual item, so it can find each entity by a unique record. This would be like using the Course OID column within a course import in Acalog.

In this case, choose the “Item ID”, and then click “Save map.”

Note: Although there are options to add and remove fields to the map, it is a best practice to allow the auto mapping function to perform this action on your behalf to ensure the necessary fields are brought into the system – even you do not plan to use them all within your proposals.

New Map Details:

You may create the map to define the columns in the data you receive from the system. You must map all the columns of the file. If you do not know the names of the columns, please contact your IT department.

Settings

System:

Name:

Status:

Fields

File Column	Field Name
Column 1	Catalog Id
Column 2	Item Id
Column 3	Course Type
Column 4	Program Type
Column 5	Degree Type

Unique Item Identifiers

To prevent duplicate items when processing the data, select which field names should be unique. (For example, for a course map, you may want to select the prefix, code and name fields.)

Identifier(s):

Tasks

Once you have a map, you will need to create and run a task. A task must be created and run to move the information from your external system, and cache it within the DataStore.

Select “Sync External Systems,” and then click “Create a New Task.”

First, you will choose the system you’re creating a task for – in this case, Acalog. Next, you will choose one of your available Maps - for example, the one just created.

Note: The field indicating “Select Legend” should not be selected – this is reserved for custom plug-ins only.

Then, indicate a frequency. You will need to indicate how often this data should be updated.

You will want your frequency to occur often enough that the information in the DataStore is up to date, but not so often that it is perpetually running.

A default will appear indicating the task will run at midnight on certain days of every month, but you can change these by clicking in the fields to access the drop-down menu, and selecting a different option as needed.

As this task has just been created, it won’t run until the next scheduled date. If you need that data to be ready for use sooner, you can manually run it now by selecting run task.



It may take some time the first time this task runs, as it will cache all the information from your catalog within Integration Manager for use within the new system. Each time it is run after this, it will only need to import the new items, or things that have been modified, and will complete much faster.

If a change is made to the map, the cache will be cleared completely, and it will need to run a new task again and import all items based on the new map.

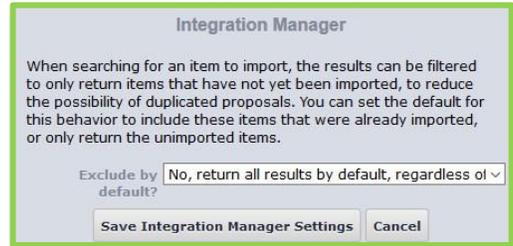
Now that we have set up the initial map and run the task within Integration Manager, we have moved the data into the DataStore — our temporary holding place.

Exclude from Import Defaults

When users are importing information to include in their proposals, results can be filtered to indicate what courses or programs have been previously imported into Curriculog to help reduce the possibility of duplicated proposals. It will not prevent them from importing these items a second time, but it will note them.

This option allows you to choose the default for the filter:

- **Yes, exclude previous imports by default.** This option will hide items that have already been imported from users, reducing the amount of available options.
- **No, return all results by default, regardless of import status.** This option will present the user with all items, however items that have been imported previously will be italicized to indicate that they have been imported.



Note: Regardless of the selection you choose here, the user may toggle this setting when searching for content at any time.

Transparency / Reports

Transparency / Reports Settings determine which areas of Curriculog are available to guests, what proposals users will have access to, and what reporting information will be available to users.

Note: A guest will be a visitor to the Curriculog system who does not log in to the site. Some institutions may choose to be transparent to the public and allow guest access. Guest access is read only and does not allow any type of editing or commenting within the system, or access to any reports.

Global Transparency

Global Transparency is used to determine whether users or guests can access certain areas of Curriculog. You can expand the Help icon for an explanation of each option available at any time. There are three default levels of transparency available:



- **Full Transparency:**
 - Guests CAN view proposals and agendas.
 - Logged in users CAN view proposals and agendas.
 - System Administrators CAN view proposals and agendas.

- **Authenticated:**
 - Guests can NOT view proposals or agendas.
 - Logged in users CAN view proposals or agendas.
 - System Administrators CAN view proposals and agendas.
- **Restricted:**
 - Guests can NOT view proposals or agendas.
 - Logged in users can only see proposals and agendas they are involved in or watching.
 - System Administrators CAN view proposals and agendas.
 - Reports are limited to System Administrators only

When the “Full” transparency has been selected, the three checkboxes labeled “Guests can view” will let you determine which modules to make available to Guests. You can choose any combination of the three, including none of them.

When “Full” or “Authenticated” is selected as the transparency level, the “Access to Reports” menu will be available. This allows you to determine whether each report can be run by all Users or only by an Administrator. You can read more about what each report can offer in the [Reports](#) section.



When “Restricted” is selected as the transparency level, reports will be revoked from users entirely and only accessible to administrative level users. This method will also restrict the proposals users can see to only those they are an active participant on, or those they have originated.

Note: *Although the Restricted transparency level only allows a user to see proposals they are an active participant on, they can continue to monitor the progress of a proposal after it has moved on from their step if they add the proposal to their watch list while it is still on their step.*



Note: *Settings selected here may override comment settings on a step. For example, if the transparency level is set to Restricted, and a step is set to allow all users to view comments – the transparency level of restricted will prohibit anyone other than those involved on the proposal from seeing the comments even though the step would otherwise allow it.*

Proposal Comments

Individual steps in an approval process will allow you to set the comment transparency to control who will be able to see comments made on that step and may restrict that view to only those participants on the step. The options here will allow you to override the step settings as an administrator.



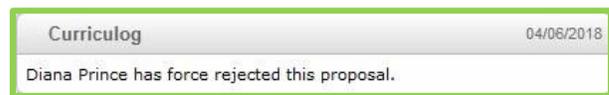
Proposal Comments

- Administrator can view all comments.
- Always show system comments.

Save Transparency Settings Cancel

The first option will allow users with administrator access to always view all comments, even if a step's settings would otherwise prevent them from doing so. The second will always show the system comments to all users regardless of the step settings. By default, "Always show system comments" will be pre-selected.

System Comments will be placed in the comments thread and appear to be placed by Curriculog, and will be used to indicate step restarts, decisions that have been made, or when an administrator makes a force-decision on a proposal as an example.



Curriculog 04/06/2018

Diana Prince has force rejected this proposal.

Approval Processes

The Approval Process Settings will allow you to determine the default System Required Field for your course type approval processes and select default settings that can be preloaded into new steps to save time when working within your approval processes.

System Required Fields

Within an approval process for a course, one of the default system required fields is "Prefix," and it is set to be a Text field, which will allow your users to manually key in the prefix information. While helpful for entering new prefix information, this does allow for the possibility of introducing errors and as an administrator you may prefer to limit the entry options to a predetermined list.

Note: Although the default title of the field is Prefix, you may rename the field within your approval process to better suit the needs of your institution. For the purposes of this manual, the default naming conventions will be used.



Approval Process Settings

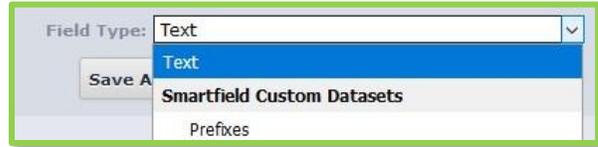
System Required Fields

Approval processes of a "Course" type, have system required fields. You may choose to have the Prefix field display as a text field (the user enters the value) or a smartfield (the user selects the value from a list). The prefix field may be designated as a smartfield and smartfield custom datasets are maintained in [Smartfield Settings](#).

Field Type: Text

Save Approval Process Settings Cancel

To change the selection from a Text field, you will first need to establish your predetermined set of options by creating a custom dataset within the Smartfields section of the settings. Once the dataset has been established, you can use the drop-down menu for “Field Type” and change the value to the custom dataset you have established to house your prefix information, then click “Save Approval Process Settings.”



Note: Once the System Required Field has been modified, the changes will **only** affect newly created approval processes. It will have no impact on existing approval processes and they will remain as they are. This gives you the ability to have a combination – for example, if you would like to have your ‘New Course’ form utilize a text field to enter a new Prefix, you can adjust the System Required Field back to text, and create that approval process. Then, you can adjust it back to a Smartfield to create an approval process for a ‘Course Revision’ process.

Approval Process Step Defaults

The Approval Process Step Defaults allows you to pre-select some of the settings for step within your approval processes to help speed up your work.

Note: Although you may specify defaults, you can override them on each step as you create them within the approval process.



- **Signature Step** - Indicates whether a signature will be required from a user on a step. How the signature is provided by the user is determined in the Users Settings.
- **Comment Transparency** - Determines who will be able to view comments on each step. There are several options available from the drop-down menu:

Note: The global transparency of the overall system may override these settings.

- *Every user (login not required)* – Guests; individuals who do not have an account within Curriculog but are able to view proposals, agendas, and similar information with read only access; users and administrative level users would be able to see all comments.
- *Every user who has a login.* – Comments on the step will be restricted to only those who have a user account within the Curriculog system, limiting this to users and administrators.
- *Every user in the hierarchy branch that owns the item.* – If the proposal had a hierarchy selection of ‘Art’, for example, then every user in a Role within the ‘Art Department’ would be able to review comments.
- *Every user involved in the proposal at any step.* – If at any time during the proposals workflow a user is brought into any step, they will be able to see the comments of this step even if they aren’t a participant.

- *Every user involved in the current step plus the originator.* – Only the individual who originated this proposal and the users who are active participants of the current step in progress will be able to see the comments of this step.
- *Only those involved on the current step.* – The most restrictive option; only the users who are active participants on this current step will be able to see the comments of this step.

Note: *If the you have enabled the option “Administrator can view all comments” under the Proposal Comments setting, then this setting will override the step setting and allow you to review comments.*

- **Rejection Route** - If a proposal receives a rejection as a decision on a step, it will follow one of two paths:
 - *Previous Step* – If you select previous step, the proposal will return to the previous step for additional revisions. It will not revert to a previous state or remove changes that have occurred. The step history will illustrate this by adding a new version of the previous step and current step into the workflow to show progression in a linear format.
 - *Originator* – If you choose to send the proposal back to the originator, the proposal will create an originator step within the workflow, and then restart all steps within your approval process. This will be illustrated within the step history to show progression in a linear format.

Note: *If you follow our best practice and use the Originator as the first step within any workflow, this will appear to create two originator steps within the workflow. The originator will need to provide a decision on both steps, or you can choose to force approve one of them to move the proposal forward in the workflow.*

This screenshot shows a workflow step with a red header labeled "Committee Step" and a status of "Rejected". Below it, an "Originator" step is shown with a status of "Working". The participants list includes Diana Prince. The activity details are: Required for Approval: 100% required, Time Spent: 12 days, Changes: No, Comments: No.

This screenshot shows a workflow with three steps. The top step is "Originator" (Status: Approved). The middle step is "Department Head" (Status: Rejected). Below it is another "Originator" step (Status: Working) with participants Diana Prince and activity details: Required for Approval: 100% required, Date Completed: 4/18/2018 9:53 AM, Changes: No, Comments: Yes. At the bottom, a final "Originator" step is shown with a status of "Incomplete".

- **Deadlines and Reminders** - Allows you to set a deadline by which items must be completed to ensure your proposals all continue moving, as well as providing the opportunity to send reminders. A deadline is a threshold set in a number of days for the step; and if that threshold is passed without a decision being made on the step, an automatic action will occur.



- *Set deadline _ days* If you would like to set a deadline, enter a whole number– for example “30.” Once 30 calendar days have passed with no decision on the step, this deadline will be triggered.

Note: *Curriculumlog does not observe holidays or weekends and will continue to count towards the deadline.*

- *Send reminder _ day(s) before deadline* This will also require a whole number to be entered, and ideally a smaller option than one that was used for the deadline. If your deadline was set to 30 as our example above, then perhaps this option may be set to “15”. On the 15th day on this step with no decision, a reminder will be sent to the user that the deadline is approaching, and they need to take action to avoid the automatic decision.

The second two checkboxes will be to include timed reminders. These reminders may be sent to the users of this step regardless of if you choose to use the deadline feature.

- *Send reminder every _ day(s)* This option requires a whole number, for example, “10”. This would send a reminder to the user every 10 days until the step has received a decision.
- *Send reminder after _ day(s)* This option requires a whole number, for example, “5”. This option would send a reminder to the user after 5 days have passed with no decision having been provided on the step.

The next option is to choose which of the two automatic actions should occur when the deadline passes. If either of these actions were to occur, the step will follow the path you’ve outlined in the rejection route settings. For approvals, this means advancing to the next step of the workflow. For rejections, it may either return to the originator or return to the previous step.

- *Automatically Reject*
- *Automatically Approve*

After making selections, be sure to select ‘Save Approval Process Settings’ at the bottom to save changes.

Proposals

Proposal settings are where you will find the thresholds to manage the Urgency and Stuck settings and determine if you would like to have crosslistings reviewed by an administrator prior to them entering the workflow – if you choose to use crosslistings.



- Urgency Threshold** The urgency value will need to be entered in a whole number – for example, “15”. This threshold indicates the total number of days you will allow a proposal to remain in a user’s task list without a decision. Once this threshold is reached, the proposal will display in the “My Tasks” tab with an orange exclamation point to mark the item as “Urgent.” The system will send the user a notification to alert them to the new status of the item but will not take any automatic action on their behalf.
- Stuck Threshold** The stuck value should be larger than the urgency value – for example it urgent is set to “15” then stuck may be set to “30”. Stuck is used to indicate how much time you will allow a proposal to remain in a user’s task list without a decision and is used to notify you as the administrator that no action is occurring. The threshold for stuck is generally larger than urgent to ensure that the user is notified and has opportunity to take action on the item prior to requesting action from an administrator. Once a proposal has passed this threshold, it will display as “stuck” on the Administrator Dashboard as a proposal requiring attention. The system will send you a notification to alert you to the new status of the item but will not take any automatic action on your behalf.

Note: You will be required to enter a value into both thresholds; they will not be allowed to be left blank.

- Crosslistings require Administrator review** If you choose to include crosslistings as an option for any of your course approval processes, you can determine if you would like them to be sent to you for review prior to entering the workflow. This is a simple toggle that can be changed at any time by selecting or deselecting this checkbox.

Note: If a deadline is set to occur prior to the Urgency or Stuck thresholds being met, they will not be activated.

Note: Urgent and Stuck notifications are not sent as a part of the standard daily notifications, and users will receive them on a daily basis when applicable regardless of the e-mail notification preferences set.

After making selections, be sure to select “Save Proposal Settings” at the bottom to save changes.

Users

User settings will manage the global permissions and preferences for users, which may override some settings at the user level.

Permissions

Making a selection here for the user permissions will preselect the default options when creating new user accounts. You can override these settings on a user basis within their individual accounts as needed.

- **Can Originate Proposals** This setting indicates that users will be able to act as an originator and create new proposals.
- **Can Import** This setting allows users to import content when creating a new proposal.
- **Can Watch Proposals** - Allows a user to add proposals to their watch list. This option cannot be disabled.



User Preferences

Each section of User Preferences includes an option allow modification in three different ways.

- **Administrators** Allows you to override the settings on an individual users account from the Administrative Dashboard. Users will not be able to change the settings of their own accounts.
- **Users** Allows any user to override the defaults within their own account. You will be able to modify your own account, but you will not be able to modify other users accounts.
- **System Only** Prevents all individual modifications. The options may only be changed from the User Settings within the Administrator Dashboard and changes will impact all users.

The available options below involve notification settings and how the signatures are provided on steps that require them.

- **Display Forms** Interactive forms and behavior will be the only option listed within the drop-down menu. This is a system default that can not be modified at this time – all users will be able to see and use forms within the proposals.

- **Originator** This setting controls how often you will receive notifications for proposals users have created.

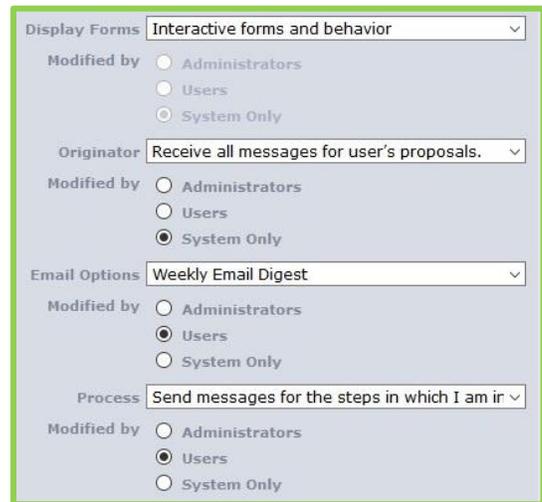
- *Receive all messages for User's proposals* – Users will receive notifications for all actions taken on proposals they have originated.
- *Receive messages for comments only for User's proposals* – Users will receive notifications when there has been a comment on a proposal they have originated.
- *Receive messages for comments and edits only for User's proposals* – Users will receive notifications when there have comments or edits on a proposal they originated.

- **Email Options** Determines how often emails from Curriculog will be sent. Choosing the “All Emails” option will send an email to you each time a notification is triggered. The other options will send a digest of all notifications that occurred since the last email; and digest emails are sent out each night at midnight UTC. As a best practice, we recommend using the digest option because Curriculog generates a lot of notifications that could quickly fill a user’s inbox if “All Emails” is chosen.

Note: All notifications will still appear on the User and Admin dashboards as they are triggered even if a different digest option has been chosen for the emails.

- **Process** Determines how often you will be included in notifications for proposals that you are a part of on at least one step.

- *Send messages for the steps in which I am involved only* – be notified only for steps that you are directly a part of.
- *Send messages for proposals in which I am involved only* – be notified for actions on all proposals you are involved in, even if you’re not involved on the current step.



The screenshot shows a settings panel with the following options:

- Display Forms:** Interactive forms and behavior (dropdown)
- Modified by:** Administrators, Users, System Only (radio buttons)
- Originator:** Receive all messages for user's proposals. (dropdown)
- Modified by:** Administrators, Users, System Only (radio buttons)
- Email Options:** Weekly Email Digest (dropdown)
- Modified by:** Administrators, Users, System Only (radio buttons)
- Process:** Send messages for the steps in which I am in (dropdown)
- Modified by:** Administrators, Users, System Only (radio buttons)

The last two options indicate the preference for how the signature pin will be provided should it be required on a step, and a way for you to view your provided pin.

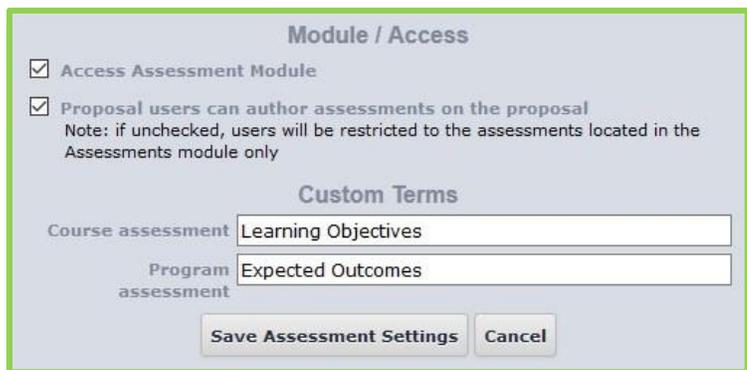
- **Upload paper signatures for signature steps** – The proposal will provide you a print friendly document to sign and upload to the proposal.
- **Use Electronic PINS for signature steps** – personal identification numbers given to you to use in place of a paper-based signature; this is recommended as a best practice.



Assessments

The Assessment Settings allow you to determine if the Assessment Module is available, as well as determining custom terms for course and program assessment features, and if new assessments can be authored on a proposal by users.

To enable the Assessment Module, ensuring that it appears across the top of the page from the Administrative Dashboard and Assessment fields appear within newly created approval processes – check “Access Assessment Module.”



On any new approval processes, a Proposal Objective section will appear as a default field. On Course type approval processes, that will default to “Learning Objectives” and with Program types, it will be “Expected Outcomes” but you can change either of those terms by replacing the text in the “Custom Terms” section.

Assessments are treated similar to a dataset – in that you will create a list of available options for a user to choose from when adding them to a proposal. If you would like to provide your users with the option to create custom assessment items directly on the proposal – you can check “Proposal users can author assessments on the proposal” to provide them with this option. Items entered by users on the proposal are considered one-time usage and are not added to the list of available options entered by you within the Assessments module.

If you do choose to use and enable the Assessments module, please refer to the Assessments section of the manual for more information on providing the list of options for users to select.

Once all selections have been made, select “Save Assessment Settings” to save changes.

Note: The Assessment Module requires manual entry and does not allow for importing or exporting of content at any time.

Smartfields

Smartfields allow users to select an option from a predetermined list defined by an administrator. To be able to use a Smartfield within an approval process, you need to first create a dataset to house the options it will need to reference.

You can add a dataset to house any type of information – common examples include prefixes, course types, degree types, or program types. To create a new dataset, select “Add Dataset” to launch the Edit Smartfield dataset window.

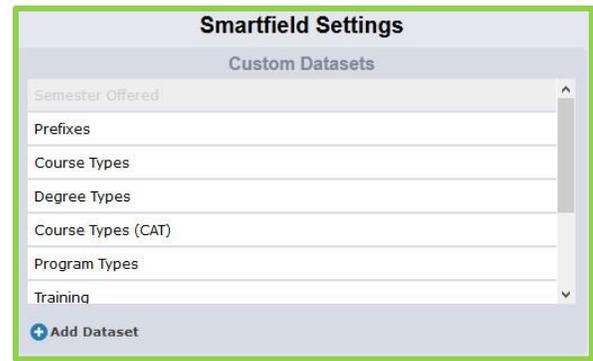
Next, you will need to provide a name for the dataset, for example, “Prefix” or “Course Type.” The names of the datasets will only be visible to you as an administrator, but it will be helpful to name them in a way that is easily identifiable later as you will only be able to refer to them by the name you provide here. Once you have provided a name, click “Update” to save the name and create the new dataset.

Note: Once you have created a dataset, you will not be able to delete it. You may rename it, remove all values from it, or even deactivate it – but you cannot delete it.

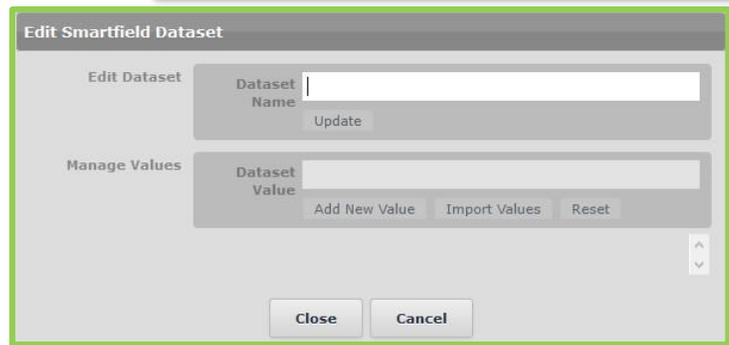
The next step will be to begin adding values. Dataset values may be entered manually or imported from an external source.

To add a value manually, enter the information into “Dataset Value”, and then select “Add New Value” and you will see your new entry populate in a list below the field. You may add any number of values into the system and you will see them arrange themselves into alphabetical order. To delete a value, hover over it and select the blue “x”  that appears to the right.

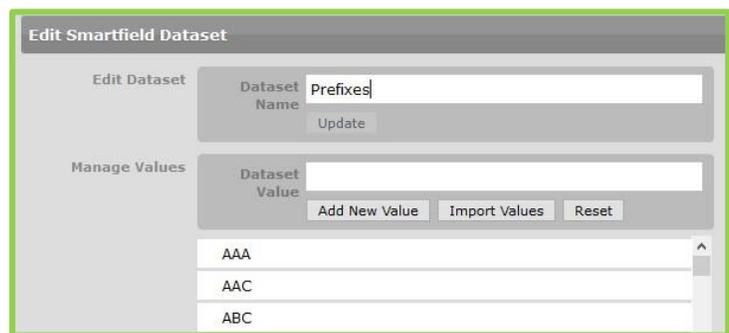
Note: Once a value has been added, it cannot be edited. If a mistake was made when keying in the entries, you can delete the value and recreate it.



The 'Smartfield Settings' window shows a list of 'Custom Datasets'. The list includes: Semester Offered, Prefixes, Course Types, Degree Types, Course Types (CAT), Program Types, and Training. At the bottom, there is a '+ Add Dataset' button.



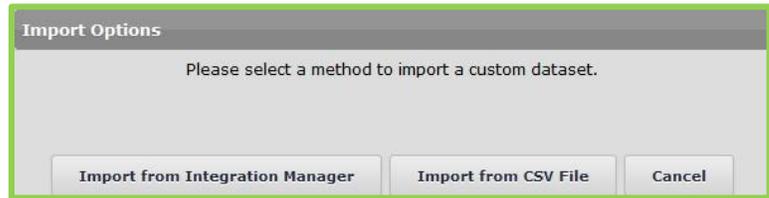
The 'Edit Smartfield Dataset' window has two main sections. The 'Edit Dataset' section has a text field for 'Dataset Name' and an 'Update' button. The 'Manage Values' section has a text field for 'Dataset Value' and buttons for 'Add New Value', 'Import Values', and 'Reset'. At the bottom are 'Close' and 'Cancel' buttons.



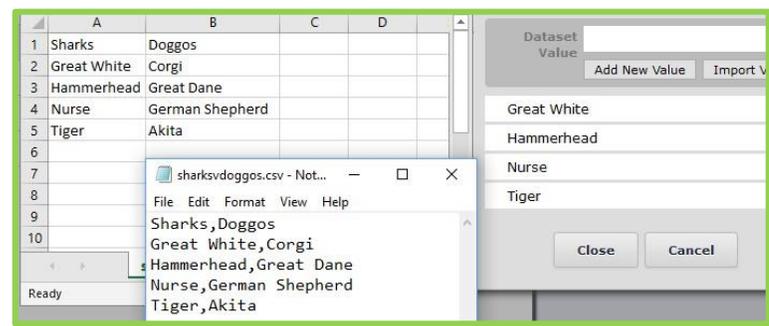
This 'Edit Smartfield Dataset' window shows the 'Dataset Name' field populated with 'Prefixes'. The 'Dataset Value' field is empty. Below the 'Manage Values' section, a list of values is displayed: AAA, AAC, and ABC. Each value has a small blue 'x' icon to its right for deletion.

When importing values, you can either import from an external system – like Acalog – or you can import from a CSV file.

To import values, start by selecting “Import Values.” Next, you will need to indicate if you would like to import from Integration Manager and pull from a connected external system or from a CSV file.



If you are importing from a CSV file, only the first record of the file will be imported. This may appear as the first column if you were viewing the file in an application like Excel, or the first entry of each line if viewing it as text.



Note: If the file contains a header row that should be ignored and not entered as a value, be sure to check “Use First Row as Header”.

If you are importing from Integration Manager, selecting the “Import from Integration Manager” option will launch a new window listing available maps to any connected external systems, like Acalog. For more information on setting up additional maps, please see [Integration Settings](#).

Once you have selected the map you would like to import from, you will need to choose the information you would like to import to use as a dataset. As you scroll through the list of options, selecting one will provide a preview of the values that will be imported so that you can ensure the right data will be brought into your dataset prior to importing. When you have made your selection, click “Import this dataset” to add the selected values to your dataset.



Note: There are a few restrictions to the type of data that can be imported into a dataset.

- Field names containing slashes (/) cannot be used as an import source. They will be disabled in the drop-down menu.
- There is a limit of 255 characters for each dataset value.
- Only plain text is allowed in dataset values. Formatting code, such as HTML, will be shown as is.

Once a dataset has been created, you will be able to modify it at any time. The full list of datasets will be available from the Smartfields tab within Settings and hovering over the name of any dataset will generate two icons to the far right – the edit icon  and the deactivate icon .

The edit icon  will launch the “Edit Smartfield Dataset” window again and allow you to make changes to the name or values of an existing dataset. You can continue to add additional values either manually or by importing additional ones, and you can remove values by using the blue “x”  icon to remove them. Again, you will not be able to edit the values, but you can remove them and recreate them as needed.

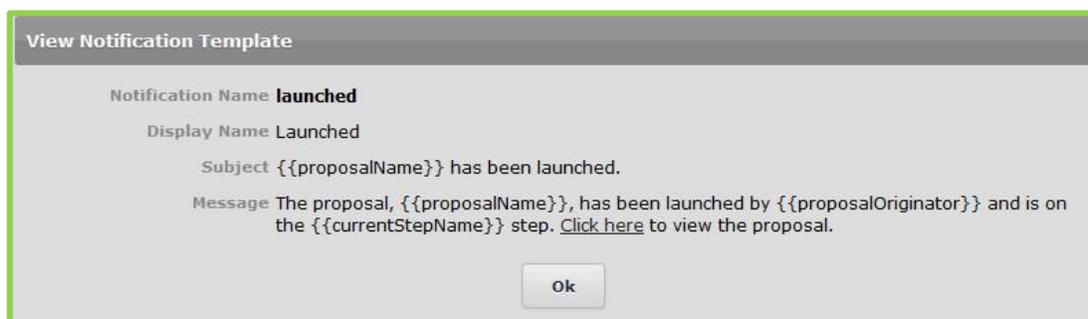
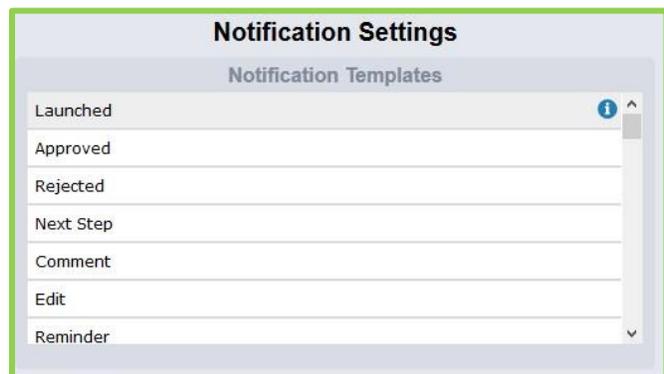
Datasets cannot be deleted after they have been created – but they can be deactivated to if you no longer need to use them. To deactivate a dataset, click the deactivate icon . If you later decide you’d like to use this dataset again, you can click the activate icon .

Notifications

The Notification Settings will provide you a preview of the templates for the e-mail notifications that will be sent to users. Each notification is based on a template named after the event that would trigger it and selecting the template by clicking the blue icon  will allow you to view the message.

When the notification is sent to the user, the contents appearing within the brackets will be replaced with content relevant to the actual event.

The notification templates are provided for review only and are not able to be modified.





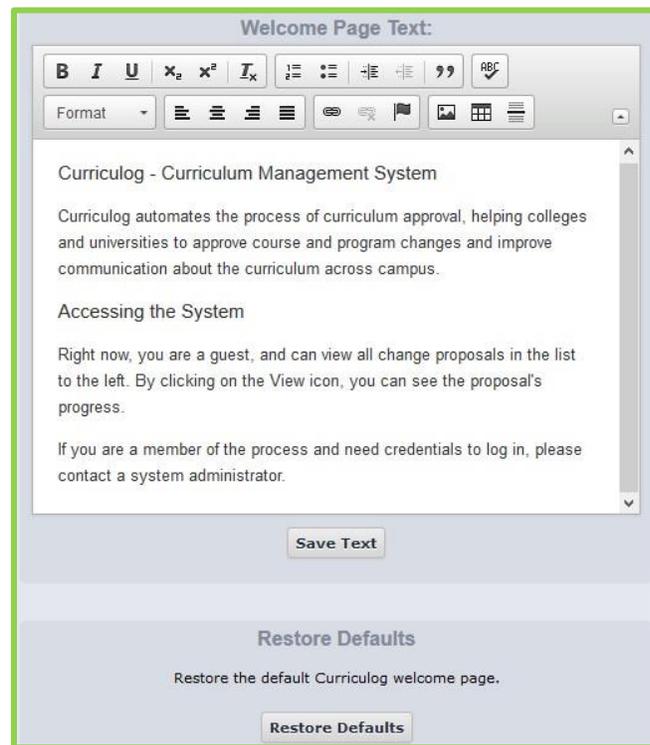
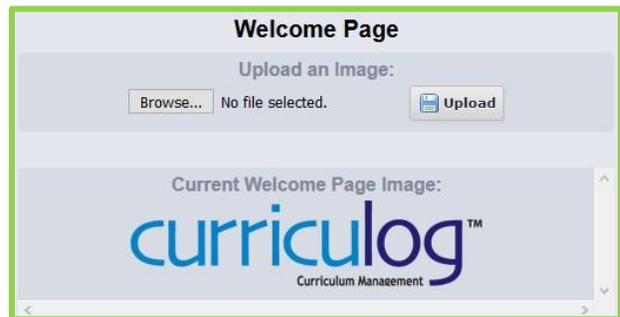
Welcome Page

The Welcome Page settings will allow you to make changes to the default welcome message that appears when users first navigate to Curriculumlog. You can change this as often as you would like to, but it is suggested that you don't place anything on this page that would require your users to reference often as they will only see the welcome page when they are not logged into the system. If they need to reference this information again after they have logged in, they would need to log out again to refer to the contents, then log back into the system to resume working.

There is one image available on the Welcome Page – the default will be the Curriculumlog logo, but many institutions choose to change this to their school's logo instead. To change this, click "Browse" to locate a file on your computer, and then click "Upload".

The text of the Welcome Page can be customized by using the provided WYSIWYG editor. The default message briefly explains what Curriculumlog is and how to log in, and many schools choose to customize this with their own log in details or information on who to contact for assistance or where to get help. If you choose to make any changes to this content, be sure that you click "Save Text" at the bottom to save your changes.

If modifications are made and you later decide that you would prefer to return it to its default settings, you can select "Restore Defaults" at the bottom.





Help

Although the administrator users will have a floating support widget available at all times, users will not have access to this tool and will need to reach out to their administrators for assistance when working within Curriculog.

Curriculog provides a “Contact System Administrator” link at the bottom of the page for all non-administrator accounts, next to the Curriculog University link. This link allows them to contact their administrator even when they don’t know who it is, as many times their questions relate to specific policies and procedures that our team would be unable to assist them with as we’re not the experts on your policies – you are.



Help Settings

First Tier Support

Curriculog offers a support form to user-level participants, so that system administrators can become first tier support for their faculty. Please specify which email address should receive these questions.

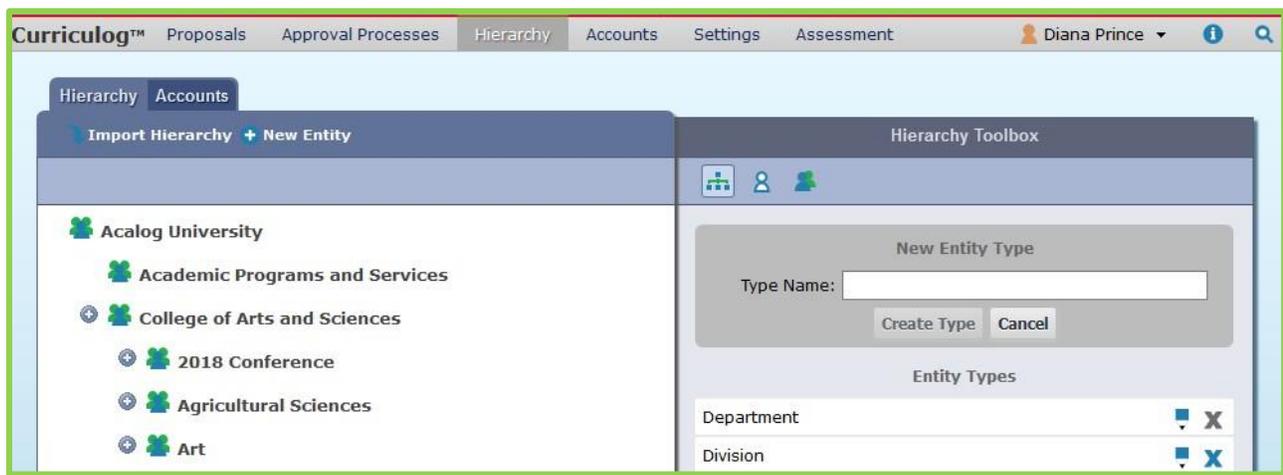
Support Email

The Help setting allows you to specify an e-mail address to designate the administrator who will be able to respond to those help requests – it could be a specific person or an e-mail group within your institution. You could also choose to change this regularly, but it provides the first line of support for your users.

HIERARCHY

The Hierarchy Module allows you to manage hierarchy entities, and entity types, role types, roles, and committees associated with them. When you first access this module, you find an outline of the existing hierarchy on the left-hand side, and the Hierarchy Toolbox on the right-hand side.

There will be two tabs available – Hierarchy and Accounts. These two tabs are visible here and within the Accounts Module as they are very closely involved with each other, and it provides easy access to each location.



Hierarchy Entities and Types

The hierarchy is often described as the basic organizational structure of your institution. It often begins with the name of your institution and working in an outline format using indentions to indicate different levels of ownership, continues to list the various schools, colleges, departments, divisions, etc. that may exist within. Curriculog offers a lot of flexibility within its hierarchy structure to resemble your particular organization as closely as possible. Although it may start off using Acalog as a starting point, it does not have to be an exact match as it does not serve the same purpose.

The hierarchy within Acalog is used for display purposes – providing an area to enter descriptive content to display within your e-catalog; but Curriculog uses it to organize users that may be brought into steps of the workflow based on the hierarchy that was selected within the proposal.

Whether you are looking to edit an existing hierarchy entity, or to create a new one – the first step will be to understand the difference of the entity itself, and the entity's *type*.

Entity Types

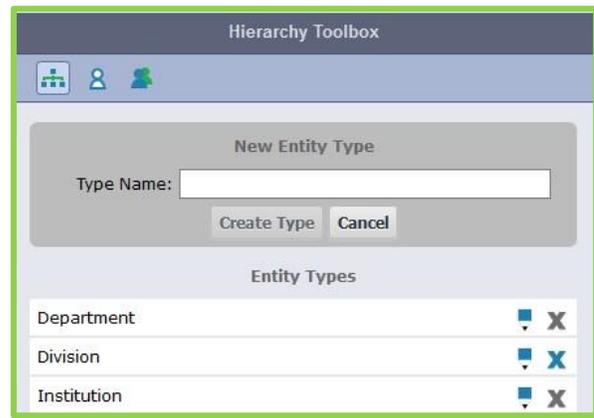
All hierarchy entities have a type associated with them. Within Acalog, those default types are Institution, School/College, and Department – but Curriculog allows you to create custom types, and as many as you would like. This can grant you some additional options later within your approval processes – such as being able to limit the hierarchy selection field to only departments rather than the entire list.

Entity Types are defined within the Hierarchy Toolbox and will be the default tab selected when you first navigate to the Hierarchy module and are represented by the Entity Type icon . You will likely find several Entity Types already in place as a result of your original implementation, or any that you may have created since.

To create a new Entity Type, enter the name of the new type into the “Type Name” field and select “Create Type.” Your new type will appear in the list of Entity Types below in alphabetical order and will be available for use immediately.

If you would like to modify an existing Entity Type, select the edit icon  that appears to the right. This will place the name of the type back into the “Type Name” field and allow you to modify it. Select “Update Type” after you’ve completed your changes and the type will be updated.

If you would like to remove an entity type, you can select the blue “x”  that appears to the right. You will not be able to delete an item that is being used by any entity. If the item is being used, the “x” will be greyed out  and you will not be able to select it. Before the system will allow you to delete a type that is currently in use, you will need to modify the entity using the type and change the Entity Type associated with it or delete the entity.



Hierarchy Entities

After the Entity Types have been established, you can begin to create the Hierarchy Entities. A full hierarchy structure may be created manually or could be imported from Acalog; although you likely have a full structure in place as a result of your initial implementation.

Note: The hierarchy in Curriculog is ONLY used to manage the entity names and their relationships to programs and courses, and house the roles for users. Descriptive information housed in the hierarchy within Acalog will **not** be brought into Curriculog.

If you need to create a new Hierarchy Entity, start by selecting the “New Entity” link, which will open a flyout in the right pane.

Manage Entity: This section allows you to manage the name and type of the entity.

- **Entity Name:** The name of the entity as it is titled within your Institution. For example, College of Arts and Sciences or Department of Art.
- **Entity Type:** The Entity Type you would like to assign to this Entity, which can be used to group Entities together. For example, Department or School/College. (For more information, see [Entity Types](#))
- **Entity Status:** Indicates whether the Entity is active or inactive. Inactive items will not be available for users to select when creating a proposal.



After entering the entity name, type, and status, select “Update” to save the information.

Manage Parents: This section allows you to manage the parents and illustrate the ownership of the Entity.

- **Entity:** The Entity drop-down menu lists all other Entities within your hierarchy as an option to parent over the Entity you are currently creating. At first glance, it will appear that the current parent is the one displaying in the drop-down menu – but it is only showing available options. Use this field to select the appropriate parent, and then click “Add Parent.”
- **Parents:** This will display all parent entities of this item. A hierarchy item may have parents within Curriculog. If an entity has more than one parent, they will appear in the list on the left side under each parent entity selected – although it is still a single entity.



Manage Roles: This section allows you to create Roles within this entity that can later be assigned to your users. Before you will be able to create roles, you will need to establish any [Role Types](#) and [Committees](#) that you may need.

- **Role Name:** It may be helpful to think about a Role as if it were a specific job title - it will exist one time, within this single entity. As a best practice, we suggest naming your Roles very carefully – using the entity name whenever possible to make them easily identifiable when viewing them from a user’s account. For example, within the Art Department, you may have “Art Department Head” serving as a Role and within the English Department, you may have “English Department Head.”





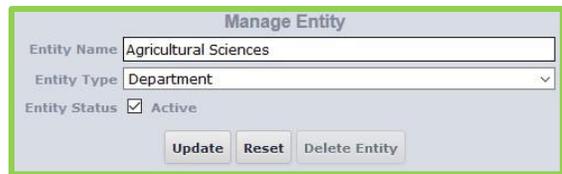
- **Role Type:** The Role Type is the more generic version of a Role that may be used across multiple Entities as a way to group roles together. For example, if your role type “Department Head” – you may find that you have a “Department Head” in every Department within your Institution, but when you look within each entity and find the further classification within the role, you find there is only one “Art Department Head” or “English Department Head” – even though they are both “Department Heads.”
- **Committee:** If the Role is to be a part of a committee, you will need to assign the specific Committee to the role. If a Committee is not assigned, the role will not be able to function as a Committee on a step.

Once an entity has been created, the entity will appear in the list to the left under the parents you’ve specified. Hovering over the entity will reveal the edit icon , which will reopen the flyout on the right and allow you to make additional modifications.



Note: The hierarchy is flexible and allows you to structure it to match your unique institutional needs creating as many entities and levels as needed. Usually an Institution will have one entity at the first-level – the Institution itself. If you choose to have more than one entity at the first-level of your hierarchy, as a best practice it is suggested that you enter the full name of the entity rather than abbreviations, and to use only initial capital letters.

One additional option now appears in the flyout – the option to delete an entity. To be able to delete an entity from the hierarchy, you must first ensure that there are no active proposals that have the entity selected, there are no additional entities parented beneath it, and there are no roles within it. When all of those are true, the “Delete Entity” button will become available and allow you to remove the entity from the hierarchy.



Entities with a plus icon  next to them can be expanded to reveal all roles within, and Roles with users assigned can be expanded in turn by clicking the  next to the Role. When you view the associated roles, the users in that role will appear listed below it.



Any items that have been expanded can be collapsed again by clicking the minus icon .

If you select a user from an expanded Role, a flyout will appear on the right showing you the users name, and name of the Role they hold. This menu is used as a part of the user management to change the Roles that have been assigned.



You can choose “Swap User” to select another user to take over this Role for them on any existing proposals, or future ones to come. When you choose the option, a new window will appear to ask who will take responsibility for the role, and you will need to click “Select user”. Next you will be able to locate a user by searching through the Hierarchy or Role Types list – noting that you can only select a user who already holds a Role within the system. There is not currently an option to search through the Accounts Module. Once the new user is selected, click “Select user” to complete the swap and the Role will be removed from the current user and added to the newly selected one.



If you would like to completely remove a user from a Role, and leave it empty, you can select “Remove User From Role.” The ability to remove the user will **only** be available if it is not in use within *any* proposal (including unlaunched) – otherwise it will be greyed out.

If you select a Role, a flyout will appear on the right showing you the Role name, and the Role Type associated with it. You can choose to update the name by modifying the text within the Role Name field and clicking “Update”, and if no user has been assigned to the Role, you can use the drop-down menu for Role Type to change the type associated as well.



Additionally, if the Role is not assigned to any user or being used within any proposals – you can delete the Role. The ability to remove the Role will only be available if it is not in use – otherwise the option will be greyed out. If the Role is currently in use and you need to remove it – you will need to complete or delete any active proposals using the Role or remove any users assigned for the option to become available.

Curriculog also provides you with the ability to import hierarchy entities directly from Acalog in the event you need to bring in several new items at once.

To perform an import, select “Import Hierarchy” from the upper left corner of the screen. The Integration Manager window will display, allowing you to select a map to a catalog within Acalog to import information from your existing catalogs. The available maps are determined in the Settings Module, under Integration Settings. Select the map you wish to use in the Import.

When importing into Curriculog, each entity item will exist only once. This means that if you have a department titled “Art” in your Undergraduate catalog, and another within your Graduate catalog – Curriculog will merge the two into a single entity titled “Art” as it does not use catalogs to separate content the same way Acalog does – it uses approval processes instead. When this occurs, a message will appear to inform you that the system will merge these items and if this results in multiple parenting, this will also reflect within the hierarchy structure as well. Once the import is complete, your hierarchy will be available on the left-hand side of the screen for use.

Role Types

A Role Type is a universal classification of a title, whereas a Role is the actual title when defined within a hierarchy entity. Role Types give us a simple way to sort through a large number of users who hold similar titles. As an example, if your Institution has 15 departments, you may have a “department head” for each one - this would be the role type. Within each of your 15 departments you may have a specifically designated title such as “Art Department Head” which only exists once in the entire Institution, and it exists specifically within the Art Department. You won’t find the Art Department Head within the Biology Department; although you would expect to find the Biology Department Head. The Art Department Head and Biology Department Head would be examples of the role – both sharing the role type of “department head.”

Here is an example of a hierarchy structure with entities, entity types, role, role types and users that are labeled accordingly – with items sharing a similar type sharing the same color to illustrate the relationship between each of the items to each other.

Curriculog University [Hierarchy Entity, Entity Type: Institution]

 College of Arts and Sciences [Hierarchy Entity, Entity Type: College]

 Department of Art [Hierarchy Entity, Entity Type: Department]

 Department Head [Role Type]

 Art Department Head [Role]

 Bob Ross [User]

 Department of Paleontology [Hierarchy Entity, Entity Type: Department]

 Department Head [Role Type]

 Paleontology Department Head [Role]

 Alan Grant [User]

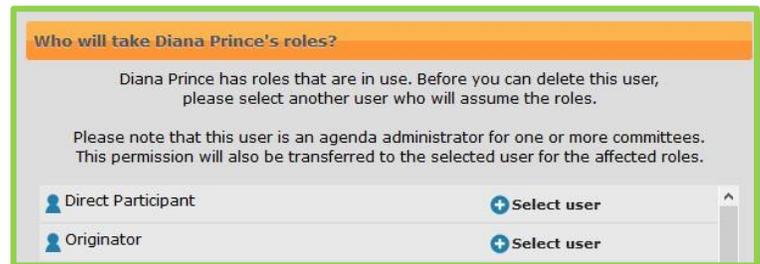
Note: Although the example illustrates roles being placed only within departments, they can be placed within any level of your hierarchy.

Prior to creating a role within a hierarchy entity, a role type must be established. For more information on creating roles, please see the [Roles](#) section.

To manage role types, select the Role Type icon  from the Hierarchy Toolbox. By default, the Originator Role Type will be provided and will be indicated in blue. This is the only system default Role Type that cannot be removed or edited, and it is used to define the user acting as the Originator – the individual who creates and launches a new proposal. This is granted to the user who creates the new proposal.

Note: In the event the user who is designated as the Originator on the proposal needs to be removed from the Curriculog system – such as an individual leaving the institution – you will have the opportunity to replace them with another user to fulfil the role as the Originator through the User Swap functionality when you are removing the account. This will be the only opportunity to change the Originator of a proposal.

To create a new Role Type, enter the new type into the “Type Name” field - examples may include Department Head, Program Director, Provost, School Director, etc. Recall that Role Types are intended to be universal and able to be used across multiple hierarchy entities.

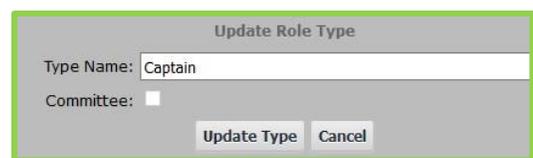


If the Role Type needs to be associated with a committee for use within a committee step to allow an Agenda Administrator to vote on behalf of a group or potentially create an Agenda - for example, a Committee Chair or Committee Member, you will need to select the “Committee” checkbox below the Type Name field.

Note: Before a committee can be used, it must be created on the Committee tab. Committees are covered within the next section.

Once you have entered a name for the Role Type and made a selection on the committee status, click “Create Type.” The new Role Type will be added to the list of existing types in alphabetical order and will now be available for use.

If you need to modify a Role Type, select the edit icon  that appears to the right. This will place the name back into the “Type Name” field and allow you to modify it and click ‘Update Type’ when you are done. If you would like to remove a Role Type, you can select the blue “x”  that appears to the right.



Note: If the Role Type is in use – either because it is currently assigned to a Role or as a participant on a step of an approval process, you will only be able to modify the name. You may only add or remove the committee option or delete the Role Type if it is not in use.

Committees

The Committees tab of the Hierarchy Toolbox is used to define individual committees and is represented by the committee icon  in the Hierarchy Toolbox as well as near Roles and Role Types associated with a committee to help designate them. Committees allow steps in an approval process to function as a committee step which includes the ability to have a user vote on behalf of the group and allows the use of Agendas.

When creating committees, it is highly recommended to name them very specific to their nature and include the hierarchy entity to which they will belong, as they will be brought into workflows in proposals based on the hierarchy entity the users select. It is common to see multiple, similar committees for different entities. For example, you may see an 'Art Department Review Committee' and a 'Biology Department Review Committee'.

To create a committee, enter the name of your committee into the "Committee Name" field and select "Create Committee." Once it has been created, Curriculog will place them in alphabetical order.

If you need to modify an existing committee, select the edit icon  that appears to the right. This will place the name back into the "Committee Name" field and allow you to modify it. Select "Update Committee" after you have finished making changes to save them.

If you would like to remove an entity type, you can select the blue "x"  that appears to the right.

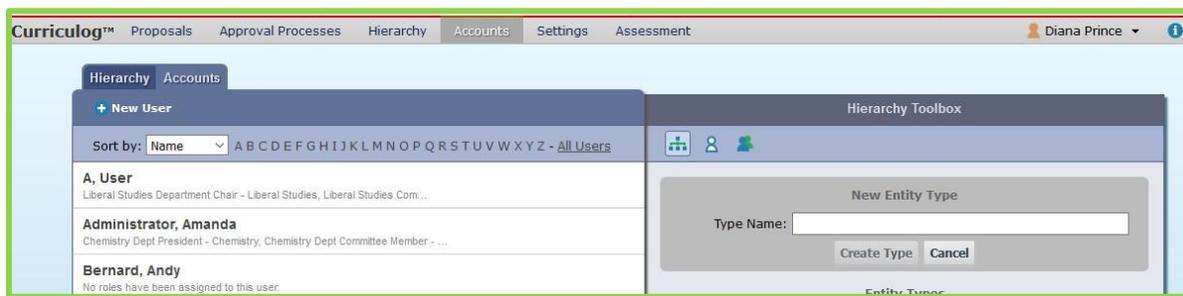
Note: You will not be able to delete a committee that is in use. If the committee is currently being used, the "x" will be greyed out . To remove an item in use, you will need to modify the Role using the committee and either delete it or replace the committee.





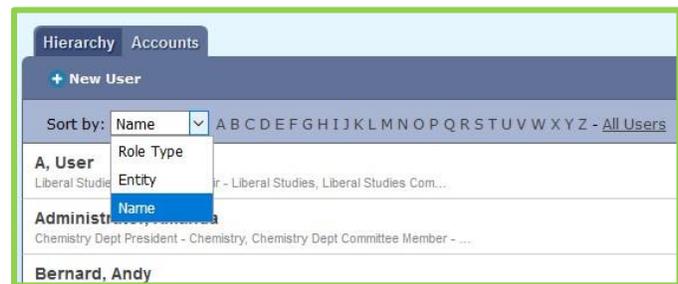
ACCOUNTS

The Accounts Module will list all users within the system, the roles they hold, and preferences for each user. For an individual to be considered a user within Curriculum, allowing them to originate, become a participant on a proposal, or leave comments – they will need to have an account listed here. As an administrator, you will be able to manage the creation and permissions of all users within your system.



Account User List

When you access the Accounts Module from the Administrator Dashboard, a list of users currently within the system will display on the left with the Hierarchy Toolbox displaying on the right. The Accounts Module and Hierarchy Module are very closely related, so there is a shortcut tab at the top of the page within each module to allow quick access between them.



You can also use the alphabet links to filter the list of users displayed just above the name of the first user listed. Selecting a letter will jump to the first section of users whose last name begins with that letter. Users will be displayed ten at a time on the page, and you can use the "Next 10" or "Previous 10" options at the bottom of the page to scroll through them.

Note: If you find that the letters do not seem to fit onto your screen properly, or that you are unable to click them – it may be that you have zoomed in too far within your browser for the contents to display properly. To correct this, you can return your browser back to its original view of 100%. Within Firefox and Chrome you can press **Ctrl + 0** to return to the default value.



You can sort results by Name, Role Type, or Entity using the drop-down menu in the upper left.

- **Name** Sorts users alphabetically by last name
- **Role** Type Sorts users based on the role types that have been assigned to them by the administrator. For example, department chair.
- **Entity** Sorts users based on the hierarchy entities in which their roles fall. For example, if Diana Prince is the Art Department Head then selecting the Art department as the entity would return her user account.

Creating and Editing User Accounts

To create a new user, select “New User” and a flyout will appear to the right with fields for you to enter the information for the new user.

Note: If you are using remote authentication (often referred to as SSO or single-sign-on) to access Curriculog, you will not need to create each new account manually. When a user attempts to log into Curriculog who has valid credentials within your on-campus authentication directory, a new account will be created for them automatically. The new account will have the default user rights and permissions assigned based on the Settings and will not have any Roles assigned to them.

The first section will be the user’s personal information. You will need to enter the user’s first and last name, and a valid e-mail account for each new user which will serve as their login.

The Remote Access checkbox will only be used if you are going to use a remote authentication service to verify a user’s credentials.

Note: For information on options regarding compatibility and requirements, please contact support@digarc.com for more information on how to implement these options.



The screenshot shows a 'New User' form with the following fields and options:

- Personal Information:**
 - First Name: [Text Input]
 - Last Name: [Text Input]
 - Email: [Text Input]
- Remote Access:**
 - User authenticates with your institution's Directory Service
- Password:**
 - Password: [Text Input]
 - Confirm Password: [Text Input]
- Status:**
 - Active

Buttons at the bottom: Save Personal Information, Cancel

A password will need to be provided for the user, and the system requires that the password contains a minimum of 8 characters. You will need to enter the password a second time in the “Confirm Password” field, ensuring that casing and special characters match. Users will be able to change the password to something more unique to them upon login.

The Status checkbox indicates whether the account is currently Active or Inactive. If an account is inactive, the user will be unable to login to their account or perform any action within the system. Only an administrator will be able to change the status of a user’s account. Once the information has been added, select “Save Personal Information” to create the account.



The Manage Roles section is where you will assign Roles to the user.

Note: To assign a Role, they must first be created within the corresponding Hierarchy Entity.

To assign a Role, first identify the hierarchy entity this user will be working within from the Entity drop-down menu. Once the hierarchy entity has been selected, the Roles drop-down menu will list Roles that have been created within that entity. Select an available Role and click “Add Role” to add it to the account.

Note: Although there is a help icon ⓘ that displays within the Manage Roles section of the User Account, a known bug currently prevents this text from opening. You may instead refer to this manual, Curriculum University, or contact Support for information regarding managing roles while our team resolves this item.



Once added, each Role will be listed under “Chosen Roles” in alphabetical order. If you hover over any of the listed Roles, the blue “x” ✕ will appear to the far right. Although in most cases this symbol indicates ‘delete’, in this setting it initiates the window to replace the user assigned to this Role.

Note: Roles cannot be deleted from a user’s account. The **only** way to remove a user from a Role, is to go to the Hierarchy Module, select the hierarchy entity, expand the Role, select the user, and click “Remove User from Role.”

Once selected, a new window will open asking you to indicate who will take over responsibility for this Role. The Role title will be indicated on the left, with a “Select user” option on the right. Clicking “Select User” will open the user selection window, allowing you to choose a user by searching through Role Types or through your existing Hierarchy for users assigned to other Roles.



Note: You will only be able to select users who already hold a Role. It is not currently possible to search the Accounts Module.

When the new user has been selected, the Role will be moved to their account and will no longer appear on the previous user’s account. All proposals in which this user was involved will now reflect the new user’s name; and any active steps will be restarted to incorporate the new user.



If a Role assigned to a user is associated with a committee, the committee icon will appear to the right side of the Role's name, and the connected committee will be listed below the Chosen Roles under the section titled "Committees".



To the right of the committee's name is the option to mark a user as an Agenda Administrator. Marking a user as the Agenda Administrator designates them as the individual who can vote on behalf of the committee and grants them the ability to create an Agenda. Each committee listed will provide this option – a user may serve as the Agenda Administrator on one committee and not on another.

Note: Although you may create Roles that are titled as Chair or Member, this does not tie the Agenda Administrator element to them automatically. Any person associated with a committee may fill the role of the Agenda Administrator.

The User Rights section will allow you to manage the permissions and preferences on a user by user basis.



The permissions grant you the ability to allow the user to originate proposals, import, and designate them as a System Administrator. The default settings placed here are provided in the [Settings](#) module, but you may change them per user as needed.

Note: A user designated as a System Administrator will have unlimited access with no restrictions, and it is recommended to have few as possible.

The user preferences involve notification settings and how the signatures are provided on steps that require them. These options may or may not be available based on how you have configured your system [Settings](#).

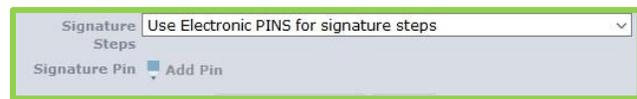
- **Originator** This setting controls how often you will receive notifications for proposals users have created.
 - *Receive all messages for User's proposals* – Users will receive notifications for all actions taken on proposals they have originated.
 - *Receive messages for comments only for User's proposals* – Users will receive notifications when there has been a comment on a proposal they have originated.
 - *Receive messages for comments and edits only for User's proposals* – Users will receive notifications when there have comments or edits on a proposal they originated.

- **Email Options** Determines how often emails from Curriculog will be sent. Choosing the “All Emails” option will send an email to you each time a notification is triggered. The other options will send a digest of all notifications that occurred since the last email; and digest emails are sent out each night at midnight UTC. As a best practice, we recommend using the digest option because Curriculog generates a lot of notifications that could quickly fill a user’s inbox if “All Emails” is chosen.

Note: All notifications will still appear on the User and Admin dashboards as they are triggered even if a different digest option has been chosen for the emails.

- **Process** Determines how often you will be included in notifications for proposals that you are a part of on at least one step.
 - *Send messages for the steps in which I am involved only* – be notified only for steps that you are directly a part of.
 - *Send messages for proposals in which I am involved only* – be notified for actions on all proposals you are involved in, even if you’re not involved on the current step.

The last two options indicate the preference for how the signature pin will be provided should it be required on a step, and a way for you to add the pin for the user.



- **Upload paper signatures for signature steps** – The proposal will provide you a print friendly document to sign and upload to the proposal.
- **Use Electronic PINS for signature steps** – personal identification numbers given to you to use in place of a paper-based signature; this is recommended as a best practice.

To provide the user with a unique pin to use on a signature step, click “Add Pin.” This launches the Signature Pin window where you can enter the pin on the user’s behalf. The user will not be able to enter or change their own pin, but they can view it from within their account information. Only an administrator will be able to provide or change the pin that has been entered.



Note: Although a 4-digit pin is not required, it must be at least 4 characters in length and it must contain all numbers.

When you are done modifying the User Rights, be sure to click “Save Preferences”.

Removing a User

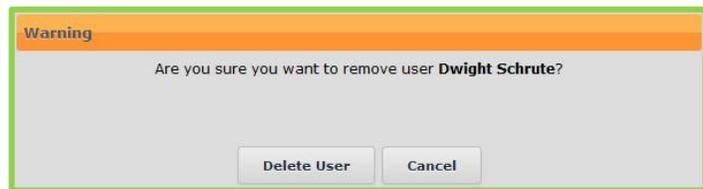
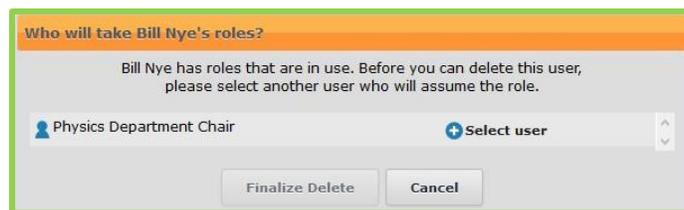
Whenever possible, we suggest as a best practice that you change a user's status to Inactive rather than deleting them. To change a user's status, select the user's account and deselect the checkbox next to "Status" and click "Save Personal Information". This will prevent the user from being able to log into the system, and you can change the status back to Active at any time.

Note: This becomes increasingly important if you have remote authentication enabled. Users are "soft-deleted" within the system, so when your remote authentication set up attempts to create a new account using the same credentials as the deleted account, the system will return the status that the account has been deleted and will not allow the user to log in. This will require the assistance of our support team to resolve.



Sometimes it will be necessary to completely remove a user's account from the system – for example, if someone were to leave the institution. To remove a user, hover over the user's name in the Accounts list, and select the blue "x"  that appears in the far right of the user's row. This will display a dialogue box that will display one of two messages:

- If the user you are attempting to delete has no assigned roles or active proposals, you will be asked to confirm that you would like to remove the user. Select "Delete User" to remove the user from the system.
- If the user has assigned roles, you will be prompted to replace that user in the affected roles. Click "Select User." Once selected, a new window will open asking you to indicate who will take over responsibility for each Role this user holds, which may include the Originator Role. The Role title will be indicated on the left, with a "Select user" option on the right. Clicking "Select User" will open the user selection window, allowing you to choose a user by searching through Role Types or through your existing Hierarchy for users assigned to other Roles. Users who have been assigned roles will appear under the Hierarchy item they are assigned to. Selecting a user will highlight the user blue, allowing you to click "Select User".

Note: You will only be able to select a user who holds another Role. It is not currently possible to search the Accounts Module.



When the new user has been selected, the Role will be moved to their account and will no longer appear on the previous user's account. All proposals in which this user was involved will now reflect the new user's name; and any active steps will be restarted to incorporate the new user.

Once all Role exchanges are complete, the user will be removed from the system.

When an Agenda Administrator is Involved

When a user is involved in a committee and is designated as an Agenda Administrator, there will be a few more steps involved to before they can be removed from the system.

If you deselect the "Agenda Administrator" checkbox next to the committee within their user account from the Accounts Module, you will be prompted to select the new Agenda Administrator for the committee, following the same prompts as though you were swapping the Role.

Who will take responsibility for this committee?

Andy Bernard is an agenda admin for Paleontology Committee. Please select another user who will assume the role of agenda admin for this committee.

Paleontology Committee Agenda Administrator + Select agenda admin

Finalize Delete Cancel

If you go to the Hierarchy Module, select the hierarchy entity, the Role, and then select the user – you will find a check box for "Agenda Admin" in addition to the "Swap User" and "Remove User From Role" options. This option will allow you to remove the Agenda Administrator option from the user without requiring you to swap with another user.

Andy Bernard : Paleontology

Manage User Role

User Name: Andy Bernard

Role Name: Paleontology

Committee: Paleontology Committee

Agenda Admin

Swap User Remove User From Role

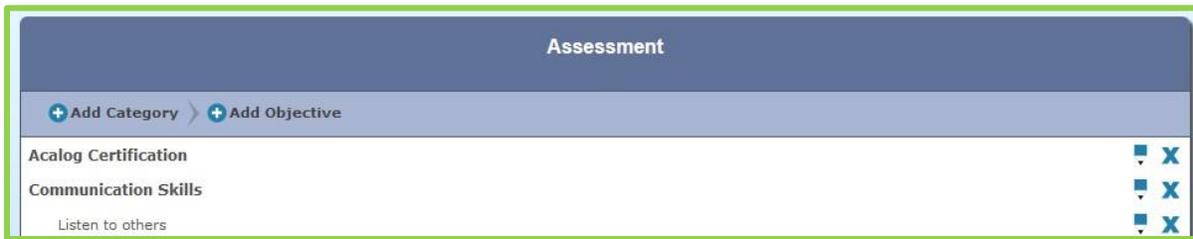
Note: If you find that you are unable to remove a user from a Role and have verified that the Role is not active anywhere in the system – it may be that the user is the designated Agenda Administrator associated with that Role. Removing the Agenda Administrator option will allow you to remove the user from the Role if it is not in use.

Note: When you remove a user from the Agenda Administrator role who has created an agenda – the agenda will be deleted and will not be able to be recovered. The proposals attached to that agenda will be released so that they can be used by the user who is taking over the role can create a new agenda when the step is restarted.

ASSESSMENT

The Assessment Module is an *optional* module where you can establish a dataset of learning objectives that users can reference and attach to programs and course proposals. Assessment items are attached as part of the workflow process but *cannot be imported or exported to or from Curriculog*.

Note: If you do not see the Assessment Module within your Administrator Dashboard, it will need to be enabled. To enable the module, please review the [Assessment Settings](#).



Similar to building datasets within the [Smartfield Settings](#), in the Assessment Module you will be creating a single dataset housing all of the values – known here as the objectives – you would like to make available to your users in a predefined list for use within their proposals.

Depending upon how you have configured the [Assessment Settings](#), you may have it set so that the options you enter here are the only selections the user can make – or you may also choose to allow them to provide additional manual entries directly on the proposal.

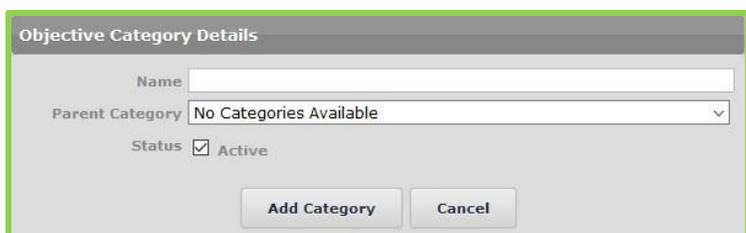
Note: If you allow users to enter objectives on the proposal, they will be single use only within that specific proposal and will not become a part of the objectives listed here in the Assessment Module. Only an administrator can add or remove objectives listed in the Assessment Module.

Within this dataset you will be able to create an outline to help organize the objectives underneath Categories; although you are not required to use them.

If you have not used the Assessments module before, you will see “No Assessments Found” listed and your options will be “Add Category” or “Add Objective.”

To start the outline, select “Add Category.” The next window will ask for the details of your category, starting with a name – for example, “Communication Skills.”

As this is the first category being entered, there will be no available categories to select for Parent Category, so the only option will be “No Categories Available”.



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As you continue to develop your outline and provide additional categories, you will be able to place them beneath other categories. For users to be able to select this option, it must be marked as “Active”, but you can choose to change the status whenever you would like to remove the option from your users. Next, select “Save Category.”

Note: Categories will be placed in alphabetical order and cannot be reordered; however, you can add numeric values to the beginning of the category entries to control the structure better – such as 1. Communication Skills.

In addition to creating categories, you will need to create the actual objectives by selecting “Add Objective.”

A dialogue box will display prompting you to select the category to display this objective within. If you choose to parent it under a category, it will appear indented beneath it to show a level of ownership. If you choose not to add a category, it will display at the same level as a category but will not display in bold text to differentiate between them.

The status checkbox indicates if this objective will be available for users to select within their proposal, and you may change the status at any time. The “Objective” field is used to provide the text of the objective the user will see and that will display on the proposal. There is no formatting available within this field, but you may enter as much text as you need. Some institutions choose to enter a simple statement such as “Public Speaking” while others may choose to provide a paragraph of justification – but there is no right or wrong way to enter the objective information. When you select “Add Objective”, the objective will be added under the category you have indicated.

Note: Objectives will not be placed in alphabetical order; they will appear under the category they’ve been assigned in the order you created them with the oldest first. As they are not alphabetized, placing a numeric character in front of the text of objectives will not control the order in which they appear.

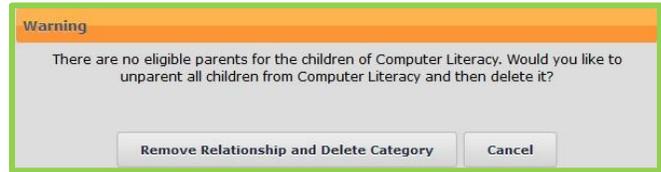
Categories and objectives will appear in an outline format with indentation to indicate sub-categories and objective ownership. They will be highlighted in light grey when you hover over them, and you will always see the edit icon and the “x” delete icon to the far right.

If you’d like to edit either a category or an objective, you can select the edit icon to open the dialogue box for the category or objective details. The dialogue box will be the same you were prompted with when creating the category or objective and will allow you to make any changes necessary.



When you have completed the modifications, select “Update Category” or “Update Objective” respectively to save them.

To delete an item, select the blue “x” . If you are removing a category that has objectives or other categories parented under it, you will be able to assign a new parent to those child items and select “Reparent children and Delete Category”.



Deleting items from the Assessment Module will not impact your existing proposals or approval processes. Deleted items will no longer be able to be added to a proposal, but if users have already added them to a proposal they will remain there.

Note: *The enabling of the Assessment Module will include the addition of the assessment field within the course and program type approval processes for all newly created forms. To see the impact this will have on your users, please see the user section on the Learning Objectives field.*

APPROVAL PROCESSES

Approval Processes (quite commonly abbreviated to “AP”) are Curriculog’s core. They will dictate the fields of the form and all the steps in the workflow.

In the Approval Processes Module, you will be able to manage all of the approval processes within your system. When you first navigate to the Approval Processes Module you will find four tabs across the top of the screen.



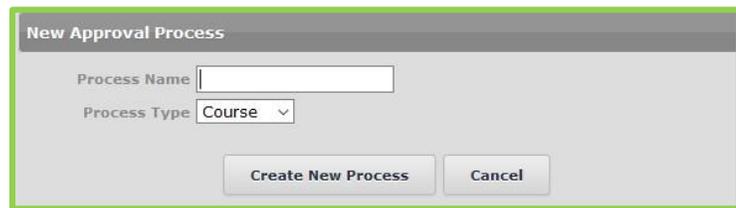
- **All Processes** - this tab will display as the default when you navigate to Approval Processes and will display all existing processes in alphanumeric order
- **Courses** - this tab will display only course approval processes in alphanumeric order
- **Programs** - this tab will display only program approval processes in alphanumeric order
- **Others** - this tab will display blank approval processes in alphanumeric order.

Below the tabs is the option to create a “New Approval Process” and on each tab you will have the option of sorting the processes by type or by title by accessing the *Sort by:* drop-down menu.

Creating a New Approval Process

To create a new process, select “New Approval Process”.

A dialogue box will display prompting you to enter a name for the process.



Note: As a best practice, we recommend naming the process to include the year, catalog, and purpose of the form – for example, “2018-2019 Undergraduate Course Revision”. This will allow for greater success in searching for specific proposals, versioning processes, and exporting to an external system later.

Note: The character limit for the name of an approval process is 255 characters.

The second step is to select a process type from the drop-down menu. There are three options available: course, program, and blank.

- **Course** These processes will include system default fields specific to courses, like prefix and code, that cannot be removed.
- **Program** These processes will include the program type and prospective curriculum fields that cannot be removed.
- **Blank** These processes will contain only one default – hierarchy. They are completely customizable but with one drawback: they cannot import or export any information.



Once you have entered the name and selected the type you'd like to create, select "Create New Process".

Note: Once you have selected a process type, you will NOT be able to change it. If you have selected the wrong type, you would need to create a new process of the correct type.

New Approval Process

Process Name: 2018-2019 Undergradua

Process Type: Course

Create New Process Cancel

You will be directed to the newly created approval process where you may continue to refine the process. All three process types have the same options for adding new fields and steps – however they will have differing default fields. The proposal form will display on the left and the Approval Process Toolbox will display on the right.

2018-2019 Undergraduate Course Revision

course

General Catalog Information

+ Add Row to General Catalog Information Section

Hierarchy + Add Item

Owner

Prefix Code

Name

Approval Process Toolbox

Status: Unlaunched

Steps to Approval

All Curriculog users can use this process.

Restrict By Entity

+ Add Step

Approval Process Name

Although you named the approval process when it was originally created, you can also change it at any time. Above the form, you will see the title and type listed, with the edit icon just to the left of the name. Selecting this will open the "Rename Approval Process" window, allowing you to change the name of the process. When you are done, click "Rename Approval Process" to save.

Rename Approval Process

Process Name: 2018-2019 Undergradua

Rename Approval Process Cancel

The Proposal Form

Sections

The form will be broken up into sections and will always contain at least one. The default title of the first section will be “General Catalog Information” within any new approval process and it may be customized by typing directly in the field.



The grey arrow to the right will allow the section to be collapsed – which will hide all the fields within the section as well. This is useful for users when you have lengthy forms by allowing them to condense sections at a time. The default section **cannot** be removed – there must be at least one within the form.

Fields can be added within the section by using the “Add Row to General Catalog Information Section” link listed just below the section title, or at the very bottom of the section. You can also add additional sections by clicking “Add Section” at the very bottom of the form.

Note: It is recommended that you add all of the sections you intend to use, in the order you’d like them to be listed, prior to adding fields to your form. Fields may be dragged and dropped into any order, and between sections; but sections cannot be reordered once they have been placed within the form.

System Default Fields

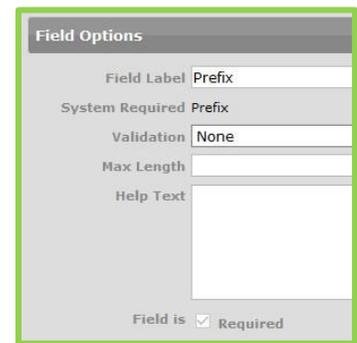
Approval processes will have system default fields that vary by type. These system defaults will **not** be able to be removed from the form and will be required input from the user. You may choose to rename them to be more specific to your institution, and Curriculog will record the original label under “System Required” in the field options for reference.

For course type processes, you will see Hierarchy Owner, Prefix, Code, Name, and Description.

For program type processes, you will see Hierarchy Owner, Program Type, Title, Description, and Prospective Curriculum.

For blank type processes, you will see only the Hierarchy Owner field.

Note: If the Assessment Module is enabled, you may also see the inclusion of the Learning Objectives field on course processes and Expected Outcomes on program processes.





Organizing the Form

The forms of the approval process are designed to be flexible and allow you to customize them as often as needed without any input from an IT professional.

The fields of the form can be placed in any order you like, and this is done by a drag and drop action. To move any field, hover over it – you will see it highlight blue and a grey arrow icon  appear to the left of it. Left-click and hold this icon, then drag the field up or down within the form until you reach the new location for your field and release the mouse button. The form will save automatically.



Note: You may move fields between different sections – but you cannot reorder sections within the form.

In addition to reorganizing the fields, you will sometimes need to remove a field. It may be that it was added in error or simply no longer needed.

To remove a field, hover over it – you will see it highlight blue and a blue “x” icon  will appear to the right of it. When you select this icon, a warning window will appear asking you to confirm that you would like to remove this field from the form. Click “Delete Field” to confirm and the field will be removed.



Note: If the delete icon  does not appear when you hover over the field, check to see if the field is a system required field – as these are unable to be removed from the form.

To edit any field, select the blue pencil icon  to access the field options. The configurable field options will vary based on the type of field you are editing. Please see [Field Type Configuration Options](#) for more details on each field.

Note: System default fields contain presets that cannot be edited, such as the Required option.

Field Options

Field Label

System Required Title

Validation

Max Length

Help Text

Field is Required

Displayed on the Proposal Summary

Searchable

Editable on Crosslisting

Field has User Tracking

You may add additional items to the form by selecting “Add Row to....” beneath the section title, or at the bottom of the section. Before adding fields, the system provides the option of keeping the items on a single row and spanning the width of the entire form or allowing you to split it into two columns. If you would like to convert the field back to a single column, you may select “Merge into 1 column”.

To add a field to the new row, select “Add Field”. A new window will appear, prompting you to choose the type of field you would like to add.

Note: Once a field type is selected, the field type may not be changed.



The available field types are:

- **New Text Field** - provides a small editable text field on the proposal form (ex: *Prefix, Code or Name* fields).
- **New Smart Field** - provides an “Add Item” link so items can be chosen from a list and added to the proposal (ex: adding a course type from an imported list).
- **New Text Area** - provides a large editable text area on the proposal form (ex: *Course Description*)
- **New Vertical Checkbox Set** - provides a set of checkboxes that allow for multiple selections on the proposal form oriented in a vertical list. (ex: *Choosing options for when a course is offered*)
- **New Horizontal Checkbox Set** - provides a set of checkboxes that allow for multiple selections on the proposal form oriented in a horizontal list.
- **New Vertical Radio Set** - provides a set of radio buttons that allow for a single selection on the proposal form oriented in a vertical list. (ex: *Indicating if this is an honors course*)
- **New Horizontal Radio Set** - provides a set of radio buttons that allow for a single selection on the proposal form oriented in a horizontal list.
- **New Subheading** - provides a header within a section on the proposal form; this is not editable from the proposal.
- **New Text** - provides a section of text that will appear on the proposal but is not editable from the proposal. (*Often used to provide instructional text on the form for users to see immediately*)
- **Blank Placeholder** - creates a blank space on the proposal form.

After selecting field type, another window will display to edit the *Field Options*. The field options will vary based on the type of field you’ve selected (see below in the [Field Type Configuration](#) options).

Field Type Configuration options

Below you will find the options for each of the available field types within the approval process form, followed by the options unique to each one.

Field Label is where you enter the name of the field you're editing, such as Prefix, Code, or Name.

System Required indicates if this is one of the system default fields, and if so, the original name of the field. If this is a field, you have created this will read 'none'.

Help Text allows you to enter instructions for the user as a guide on how the field should be completed

- **Field is**
 - **Required** - indicates if the field is mandatory to create the proposal. Use this to force the user to add information, as they will be unable to launch a proposal if this is left blank.
 - **Displayed on the Proposal Summary** - indicates if the field will display on the Proposal Summary flyout to the right when the proposal is selected for viewing.
 - **Searchable** - indicates if the field should return in search results
 - **Editable on Crosslisting** – indicate if the content within this field can vary between crosslisted proposals; this box will be grayed out if crosslistings are not turned on and is only applicable within course type processes.
- **Field has**
 - **User Tracking** - indicate if changes to the field will be tracked by user. **It is strongly suggested that this option is checked for every field of every process.**

Text Field

If a specific type of information is required for a field, you have the option of choosing a type of **Validation** from a drop-down menu. The validation options are:

- **None** - no validation is required; any text may be entered.
- **Numeric** - allows numbers only. Will not allow for special characters, decimals, hyphens, etc.
- **Alpha** - allows alphabetic characters only. Will not allow for special characters, decimals, hyphens, etc.
- **Email** - a valid email address must be entered in the format of name@domain.com
- **Phone** - a ten-digit number must be entered.
- **Date** - requires that a date is entered in the appropriate format (mm/dd/yyyy).

Note: When validating the form on a date field, if it fails, the help text will request that the date be entered as (mm/dd/yyyy) however it will also accept (mm/dd/yy).

Max Length allows you to set the maximum number of characters for a given field. This can be helpful to match to the length of the field of the system you may be planning to export to – for example, the prefix field in Acalog is limited to 255 characters, so applying the same limitation can help to avoid truncated data.



Smart Field

Dataset provides a drop-down menu of available datasets. The options start with Entity Types, allowing you to provide a list of hierarchy items based on their types; followed by role types, and then by the custom Datasets that you create in the [Smartfield Settings](#). The selection you make here determines the values the user can choose from on their proposal.

Single Select provides a checkbox that indicates if you are restricting a user to a single selection from the data set. Help Text allows the administrator to enter instructions for the user as a guide on how the field should be completed. The Field is section is a series of checkboxes:

Text Area

- **Field has**
 - **Rich Text** – provides a Rich Text editor for formatting text.

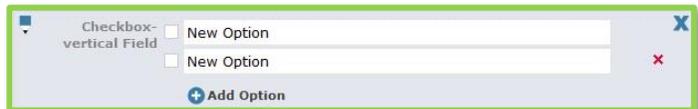
Checkbox/Radio Set

Checkbox and Radio sets have no varying options, however once the field has been added to the form, you will be able to modify text that appears within each checkbox or radio option



Place your cursor in the field and begin typing and click anywhere outside the field to save. By default, only one checkbox option, or two radio set options will be added but you can click “Add Option” to create additional checkboxes or radio sets until you have the necessary number of options.

When you hover over an option, the cursor will change allowing you to select and edit the text. Additionally, a red ‘x’ will appear to the right of the text box. Selecting the red ‘x’ will delete the option.



Subheading

When selecting “New Subheading” as your field type, the dialogue box will close, and the subheading field will be added to the proposal form displaying the text “New Field”. You can edit the subheading directly within the form by clicking in the field and replacing the text.



On a proposal, subheadings are not editable by the user – they are used as a way to organize the information within the sections of a form.

New Text

When selecting “New Text” as your field type, the dialogue box will close, and a text box will be added to the proposal form displaying the default text of “New Field.” You may edit the text directly on the form by clicking in the field. Once your cursor has been placed in the field you will see the appeared of a WYSIWYG editor that will allow you to format the contents you place within this field



Information placed in this field is visible to your users on the proposal and is often to used to provide additional instructional information. As the editor is available, it can be used to include links or images as needed and the contents are not editable by users on the proposal itself.

1. TURN ON help text before starting this proposal by clicking  in the top right corner of the heading.
2. IMPORT curriculum data from the Catalog by clicking  in the top left corner.
3. FILL IN all fields required marked with an * after importing data. You will not be able to launch the proposal without completing required fields.
4. LAUNCH proposal by clicking  in the top left corner. DO NOT make proposed changes before launching proposal. **Changes will only be tracked after proposal is launched.**

Blank Placeholder

When selecting “Blank Placeholder” as your field type, the dialogue box will close, and a blank box will be added to the proposal form.



This field type is used to add spacing between fields. It is not editable by you or the user within the proposal but may be dragged and dropped within the form to help organize the placement of the fields.

Removing a Field

When you hover over a field in your form, it will be highlighted in light blue. In addition to the move  and edit icons  that become available to the left of the field, a blue “x”  will appear to the right.

Note: System default fields will not have this option available.

After selecting the blue “x”  to delete the field, you will receive a warning. Select “Delete Field” and the field will be removed from the proposal form.



Note: If you are deleting a field that is a part of a row that has been split into two columns, the row will revert to a single column.



Approval Process Toolbox

When viewing an approval process, you will find additional information displayed in the flyout to the right of the proposal form that will help you manage the workflow – the Approval Process Toolbox. There are four sections within the toolbox: Steps to Approval , Add Title , Crosslistings , and Map Import . Hovering over the icon will display a tooltip labeling what each icon represents.



Steps to Approval

The Steps to Approval section is where you will determine workflow of your process: who should be involved on each step, how many steps there will be, what is allowed on each step, and what is required for the step to advance

Note: Selecting “Restrict by Entity” should limit the use of an approval process to only those users who hold a Role within the selected entity. At this time, however, we have confirmed that currently this feature does not currently function as intended. After selecting “Restrict by Entity” the system will still allow participants from any entity to be selected for use within steps. This feature is currently under review with our development team.



To add a step to the approval process, select “Add Step”. A gray bar titled “New Step” will be added. Selecting “New Step” will expand the step allowing you to edit the step name and settings.



To edit the name of the step, place your cursor in the step name field and enter the new name of the step. You can title the steps anything you like, but it is helpful to name them relevant to the group of participants who will be brought into the step - as an example, “Originator”.



Note: As a best practice, we strongly encourage the first step of any approval process to be the originator step. User tracking within Curriculum does not begin until the first step of the workflow has begun – meaning changes made on the unlaunched state of a proposal are not tracked by the originator. Providing the originator step at the beginning of the workflow allows for changes to be entered and tracked, which are especially important on items being imported.

Once you are done, click anywhere outside the field to save the name of the step.

Note: If you immediately move from the step name to click on another option, the first mouse click will save the changes to the step name field – and will require a second click to expand the option that you wish to expand.

Below the step name are several sections of a step that you can manage. Each step that you create will have the same options and you are able to customize them in any combination of ways to meet the needs of your individual workflows.

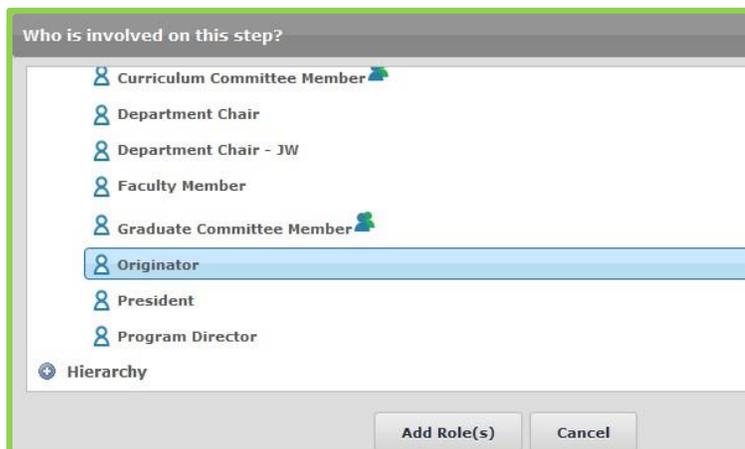
- **Participants** This section is used to indicate the users who will be brought onto the step
- **Conditions** This section is used to determine if a step will be a conditional step, and what the conditions will be
- **Rules** This section is used to determine if the user can edit or comment, if signatures are required, if the step will be a committee step, and who can view comments
- **Decisions** This section is used to indicate the type of decision required, if any flags are available, the rejection route, and additional users for notification purposes
- **Deadlines/Reminders** This section is used to provide a deadline and automatic action or reminders

To manage any section of the step, click on the title of it to expand it and view the additional options.

Participants

Participants will allow you to choose who will be brought into the workflow when a proposal is launched, based on the Hierarchy Entity that the originating user selects. As a best practice, we suggest that you use Role Types when creating steps, as this will allow you to create universal approval processes that can be used across multiple hierarchy entities.

For example, each department within your hierarchy may contain a “Department Head” Role Type. When the user chooses a department, Curriculog will vary which department head it selects based on the entity selected. So, if Biology were selected, it would select the “Biology Department Head” and if Paleontology were selected, it would select the “Paleontology Department Head”.



To select a participant, click “Add Participant.” This will open a new window titled “Who is involved on this step?” and will provide two options – Role Types and Hierarchy. As noted previously, our best practice suggests that you utilize the role type option when adding users to your workflows – so click the “+” next to Role Types to expand it, then select the role type you would like to add to your workflow. Once selected, the item will be highlighted in blue, and you can select “Add Role.” If you would like to add multiple role types, you can select more than one option and you will see them all highlighted blue within the menu prior to clicking “Add Role.” If you wish to remove a role type from the selection, you can click it again to remove the blue highlight.

Note: *If this were the first step in your workflow, the suggested Role Type would be “Originator.”*



Once added, the Role Type will appear below the list of participants on your step.

Note: At this time, only the Role Type will display under the “Participants” heading. The users will not appear with an actual name until an actual proposal is created based on this approval process, and a hierarchy entity is selected.



If you need to change the participants, or remove them, start by clicking “Add Participant” again to reopen the “Who is involved on this step?” window.

All users highlighted in blue are to be added as a participant. To remove them, click again on the row to deselect them and remove the highlight. When all changes have been made, click “Add Roles” again to return to the step with the new changes.

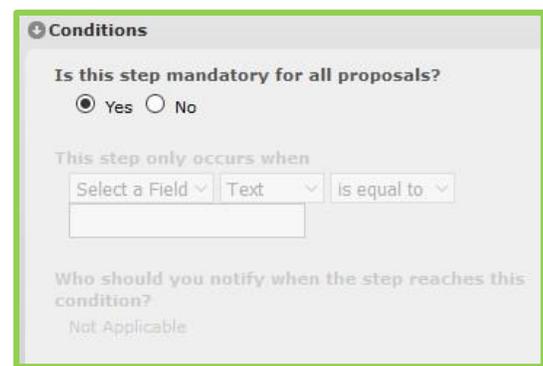


Note: Although it is our best practice to choose a Role Type for the participants, there are times when you need to select a specific individual regardless of the entity selected on the proposal – such as when you would like the administrator to be brought on to a later step. In this case, you may choose to look for a specific user through the hierarchy option. When searching for users, you will only be able to select users who have Roles associated with them – you will not be able to search through the Accounts Module.

Conditions

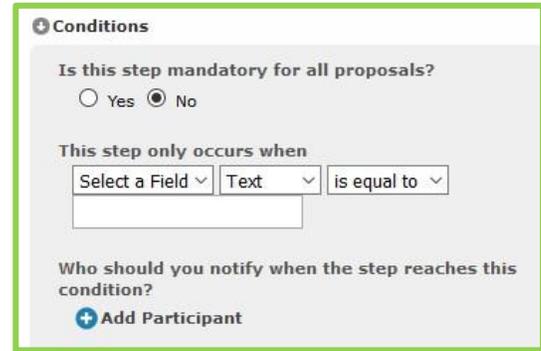
Conditions allow you to determine if a step only occurs because of certain criteria being met; and what that criteria will be. Steps default to a setting of “mandatory”, indicating they will occur in every proposal, but if you expand the Conditions section – you can change the mandatory setting to “No” and enter the criteria for what would trigger this step to occur.

Note: It is important to keep in mind that a conditional field must be triggered at launch of a proposal. Once the proposal has been launched, the trigger will no longer occur.



Once you select the “No” option, the options for criteria designation of when the step occurs will become available, and you will notice that the step itself becomes a lighter color overall to distinguish it from the mandatory steps of your workflow. Next, you will need to provide the criteria that triggers the step in the “This step only occurs when” field.

There are four fields that comprise this one area that must all be filled in to indicate the trigger.



- **Select a Field** This drop-down menu will list the available fields you can select from the form of your approval process that will use the contents to determine if it meets the criteria. Not all fields will appear as an available option – currently you may only use fields set as a text field, radio set, or checkbox.
- **Text/Number** This field is used to determine the type of data housed in the field. You will need to indicate if Curriculog should expect alphabetical characters with the “Text” option, or numeric characters with the “Number” option.
- **Is... /Contains** This field is used to determine how the data in the provided field is to be read and varies based on the Text/Number field selection.
 - *Text* If the text required to trigger the step were “raptors”, and the setting was:
 - Is equal to: This selection would require the value be entered as “raptors”, matching in spelling and capitalization.
 - Contains: This selection would allow the user to enter “Velociraptors” as it does contain the entirety of the word “raptors”, even with additional characters appearing before it.
 - *Number* If the text required to trigger the step were “400”, and the setting was:
 - Is greater than: Would require a value of 401 or higher
 - Is less than: Would require a value of 399 or lower
 - Is equal to: Would require exactly 400
 - Is equal to or greater than: Would require a value of 400 or higher
 - Is equal to or less than: Would require a value of 400 or lower
- The last field is a blank field for you to enter the value to be checked against. When entering a proposal, the user would need to enter the requested value on the selected field in order to trigger the step to occur when launching the proposal.

Note: Text is case sensitive. Setting a value to “Yes” and users entering “yes” or only being able to select “yes” from a radio button will not allow the step to trigger.

You also have the option of selecting an additional user to be notified if this step is triggered. This is for notification purposes only and will not bring the user into the workflow or require any action from them.

Note: The conditional step cannot be the only step in a workflow. You will be required to have at least one mandatory step to launch an approval process.



Rules

Rules will determine what can occur on proposals, if a signature is required on the step, if it will act as a committee step, and the comment transparency.

If “Edit Proposal” is selected, participants on the step will be able to make changes to any of the fields within the proposal.

If “Make Comments” is selected, participants will be able to enter new comments or reply to existing one.

If neither is selected, the user will not be able to comment on or edit any field of the proposal.

If the “Is a signature required?” field is selected, the user will be required to provide a signature when entering a decision. The signature may be entered in the form of either a signature pin, or a scanned, uploaded document attached to the proposal – and you may decide which option the user must use when providing a signature by modifying the [Settings](#), or you can allow the user to decide for themselves which method they would like to use.

Note: Our best practices recommend using the signature pin for signatures.

The next option is used to determine if this step will function as a committee step. For this option to be available, the participants involved must be associated with a committee. To verify if the Role Type you have selected meets this criterion, look to see if the committee icon  appears to the right of the Role Type. If the Role Type is not associated with a committee, this option will be greyed out and unable to be selected. Once selected, the users on the step will have the committee functions: an Agenda Administrator will be able to vote on behalf of the committee and create an Agenda.

Note Any time you include a Role Type featuring the committee icon, check to ensure the “Is Agenda Available” option is selected”.

The last item within Rules indicates the comment transparency for the step. The drop-down menu provides options to indicate which users will be able to see the comments – but they may be overridden based on the transparency settings of the overall system. For more information about the comment transparency and the transparency settings of the Curriculog system as a whole, please see [Proposal Comments](#) within the Settings.

What work is allowed on each Proposal?

Edit Proposal

Make Comments

Is a signature required?

Yes

Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?

Yes

Who can view the comments during this step?

Every user who has a login



Decisions

The Decisions section is where you will determine the types of decisions users can provide, and the direction the proposal will move in.

The first option indicates the type of decision and provides two options:

- Approve / Reject 100% for approval** – This option indicates that all users on the step must come to a unanimous decision for the step to be approved or rejected. If all users provide a decision and it is not unanimous, the step will not advance until users either change their votes to reach 100%, a deadline is reached an automatic decision is triggered, or an administrator force approves/rejects.
- Vote: ___ % for approval** – This option indicates that a threshold must be reached for the step to advanced, **however it still requires that all users on the step provide a decision**. For example, if the step has 4 users, and the threshold is set to 75% - then only 3 of the 4 users must vote “approve”. If 3 of the 4 log-in and vote right away – the step will **not** advance to the step immediately. It will wait and allow the fourth user the opportunity to log in, review the proposal and changes, provide comments, and provide a decision – even if their decision cannot change the outcome. Only when all users on the step, **and** the vote threshold have been reached will the step advance.



What type of decision is this?

Approve / Reject 100% for approval
 Vote: % for approval

What kind of decision flags will you allow to be used on this proposal?

Hold Suspend
 Cancel Set Custom Route

Where will the proposal go next?

If Approved:
 If Rejected:

Who should be notified when the step is completed?

If Approved:
 If Rejected:

The next option allows you to offer decision flags to the users on the step, which will provide the users on this step options on their decision beyond Approve and Reject: Hold, Cancel, Suspend and Set Custom Route. You can read the full descriptions for the decision options under the [Decisions](#) section.

The next option determines the path the proposal will take once the step has received an approval or rejection.

- If Approved.** This is a system default that cannot be changed. If a proposal is approved, it will advance to the next step within the workflow.
- If Rejected**
 - Originator* – If set to the originator, the proposal will create a new step titled ‘Originator’, followed by each step from the beginning. This effectively causes the workflow to start over.
 - Previous Step* – If set to return back to the previous step, the proposal will return to the previous step only and then resume the normal workflow.

Note: *Rejecting a proposal does not revert it to a previous state; it simply returns it to a previous step to allow for further revisions.*

The last option on the Decisions tab is an **additional** notification that you can choose to provide, if the proposal is either approved or rejected. This notification is in addition to the one automatically sent to the users on the step and may be different based on the approval or rejection. To add a user to send a notification to, click on “Add Participant”, then use the  to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.

Deadlines/Reminders

The last section of the step that you can set is the Deadlines/Reminders option. This option allows you to set a number of days to be allowed for the step before an automatic action will occur and you can choose if reminders are to be sent to the users involved on the step.

The first option is for setting a deadline on the step. A deadline is a threshold set in a number of days for the step; and if that threshold is passed an automatic action will occur. If you would like to set a deadline, check the box labeled “Set Deadline.”

Once this has been checked, the next two options become available.

- **Move Step after ___ days.** This requires a whole number to be entered – for example “30.” Once 30 calendar days have passed with no decision on the step, this deadline will be triggered.

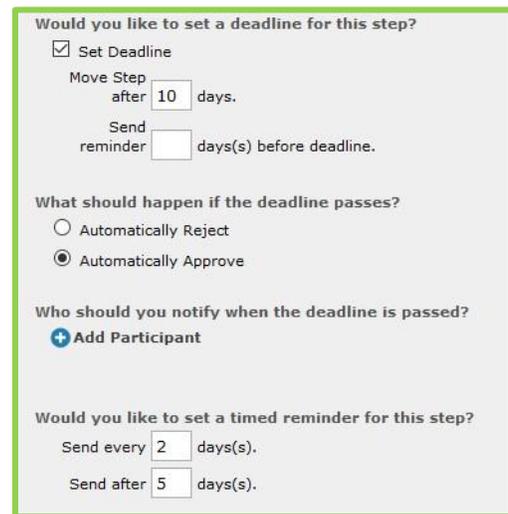
Note: *Curriculumlog does not observe holidays or weekends and will continue to count towards the deadline.*

- **Send reminder ___ day(s) before deadline.** This will also require a whole number to be entered, and ideally a smaller option than one that was used for the deadline. If your deadline was set to 30 as our example above, then perhaps this option may be set to “15”. On the 15th day on this step with no decision, a reminder will be sent to the user that the deadline is approaching, and they need to take action to avoid the automatic decision.

The next option is to choose which of the two automatic actions should occur when the deadline passes. If either of these actions were to occur, the step will follow the path outlined in the Decisions. For approvals, this means advancing to the next step of the workflow. For rejections, it may either return to the originator or return to the previous step.

- **Automatically Reject**
- **Automatically Approve**

You may also add users to be notified if the deadline passes without action. This notification is in addition to notifying those on the step and separate from the approve/reject notification. To add a user to send a notification to, click on “Add Participant”, then use the  to expand Hierarchy, then the Role, and finally the user. When you have selected the user, they will be highlighted in blue, then click “Add Role(s)” to add them to the step.



The screenshot shows a configuration form with the following sections:

- Would you like to set a deadline for this step?**
 - Set Deadline
 - Move Step after days.
 - Send reminder days(s) before deadline.
- What should happen if the deadline passes?**
 - Automatically Reject
 - Automatically Approve
- Who should you notify when the deadline is passed?**
 -  Add Participant
- Would you like to set a timed reminder for this step?**
 - Send every days(s).
 - Send after days(s).

The last option of the Deadlines/Reminders section will be to include timed reminders. These reminders may be sent to the users of this step regardless of if you choose to use the deadline feature.

- **Send every ___ day(s).** This option requires a whole number, for example, “10”. This would send a reminder to the user every 10 days until the step has received a decision.
- **Send after ___ day(s).** This option requires a whole number, for example, “5”. This option would send a reminder to the user after 5 days have passed with no decision having been provided on the step.

Once a step has been created, you can click the title of the step again to collapse it. You can create additional steps by click “Add Step”, and you can create as many steps as necessary for your workflow.

In the event you may have added steps in the wrong order or later wish to re-arrange them, you are able to easily re-order them by dragging and dropping them. To change the order of the steps, hover over the title, and drag the arrow  that appears to the left. As you drag the step, you will see a green space appear indicating where the step will be when you release the mouse button. You can move them into any order, and it will save the update automatically.



To remove a step, hover over the step you would like to remove and click the blue “x”  that appears to the right. You will see a pop-up window asking you to confirm that you wish to remove the step from the process, and it will be deleted after confirming.



Note: You will be required to have at least one mandatory step on the approval process to launch it.

Add Title

Proposal Title Fields

The Proposal Title Fields section allows you to customize the fields that make up the title of your proposals. The title can be comprised of any combination of up to three single-select smart fields or text fields.

By default, each type of approval process uses a different default set of fields.

- **Course types:** Prefix, Code, and Name
- **Program types:** Name
- **Blank:** None

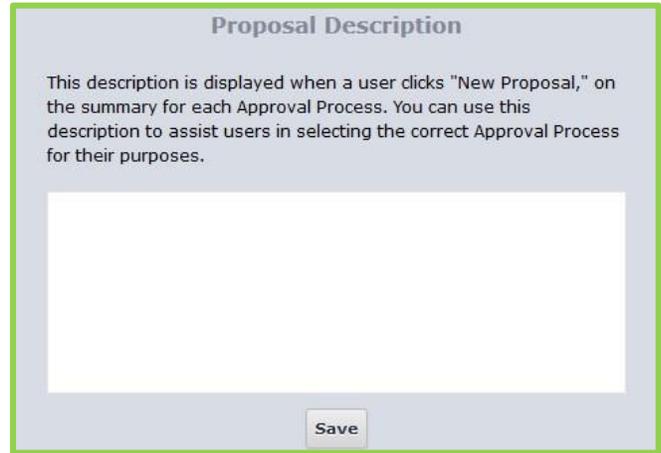
To modify these, click “Select Titles.” This window will show you the current Title Fields on the right, and the additional Available Fields on the left. To move a field, select it from either window and use the arrows in the middle to move it from either column to the other.

When you are done making your selections, click “Save Selection.” Each proposal created using this approval process will feature a title using the data held in the fields selected.

Note: You will not be able to launch an approval process that does not contain a title field. The blank process type defaults to no title selected, so one will need to be created before that type of process can be used.

Proposal Description

The Proposal Description allows you a way to describe the purpose of an approval process to your users to be displayed on the summary before they begin working on a new proposal. This may be used to indicate changes in workflow, deadlines to be aware of, or clarifying whether it is for creating new items or for revisions. This will only display within the summaries and may be changed at any time. After you have made your changes, select "Save".



Crosslistings

Crosslistings are a way to tie course proposals together based on information they share across one or more fields – for example, when two courses may share the same code, name, description and credits but are housed within two different departments and so have a different hierarchy and prefix. The crosslisting functionality within Curriculog will allow you to create multiple proposals based off a single primary proposal - allowing you to update those shared fields in all crosslisted proposals with modifications just to the primary.

When creating the approval process, you can determine if you would like to enable to ability for users to create crosslisted course proposals. To begin, navigate to the crosslisting icon  within the Approval Process Toolbox.

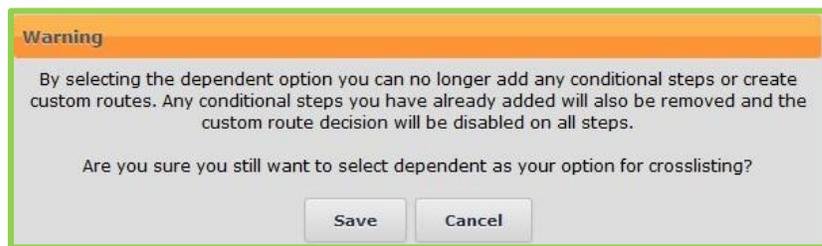
The next step will be to determine if you are going to use the crosslisting feature; and if so, what method you would like to use as there are three different types of crosslisting methods available.



The help icon  in the upper right corner can be clicked on to provide explanations for each of the methods as a reminder as well.

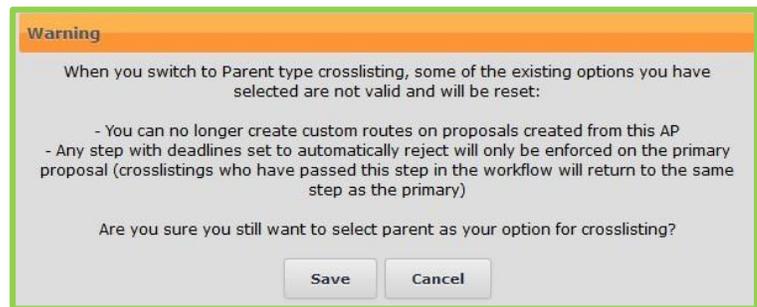
- **Independent** In an Independent relationship, each proposal will exist on its own timeline, and decisions made on one will have no impact on the other. When Independent items reach the end of their timeline, they wait, and will not go to “completed” until all other relatives are complete. All approvals will be visible, but the proposal will not be marked as “complete.”

- **Dependent** In a Dependent relationship, the primary and crosslisted proposals will wait for each other on every step, so they will always be on the same step of the approval process. If a decision other than approve occurs (reject, hold, cancel, etc.), that decision will affect all proposals.



If you select “Dependent,” you will get an alert letting you know that the approval process cannot contain any conditional steps or custom routes. If the approval process already contains a conditional step, the step will remain and become mandatory on all proposals. If the custom route decision flag is available on any step, it will be removed when this crosslisting option is selected.

- **Parent** In a Parent crosslisting, the primary and crosslisted proposals move through steps mostly independent of one another; however, if the Primary proposal receives a decision other than approve (reject, hold, cancel, etc.), the crosslisted proposal will return to that point in the AP also receive that decision. This does *not* apply if a decision other than approve is granted to only the crosslisted proposal.

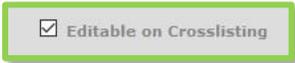


If you select Parent, you will get an alert letting you know that the AP cannot contain custom routes, and that deadlines will be enforced like other decisions on a Parent crosslisting. This means that if the deadline is set to automatically reject and the Primary proposal passes a deadline, all proposals will be rejected; however, if a crosslisted proposal passes a deadline and is rejected, it will *not* impact the primary or any other crosslistings.

- **None** Selecting none will disable the crosslisting feature.

Editable Fields

When crosslisting is enabled, you can determine which fields will vary between crosslisted proposals. To adjust this setting, click the edit icon for the desired field. In the Field Options dialogue box, locate the “Editable on Crosslisting” checkbox in the “Field is” section. Checking this box will allow the field to vary on each crosslisted proposal; if this box is not checked, the field data can only be edited on the primary proposal and cannot vary between crosslisted proposals.



Note: User tracking will only appear on the primary proposal for fields that are not editable on crosslisting; user tracking will appear normally on all proposals that are editable on crosslisting.

Once enabled, users who select this approval process when creating a proposal may choose to add a crosslisting to their proposal. Additionally, you may require all crosslisted proposals be reviewed and approved prior to launch in [Proposal Settings](#). To learn more about how users will manage proposals with crosslistings, see the [Crosslistings](#) section.

Map Import

Note: Ensure that your approval process is in its final state before adding any legends. If you find that you need to make modifications to your processes after a legend has been added, it is suggested that you make a copy of that process and deactivate the current one to avoid conflicts with the integration.

The last icon within the Approval Process Toolbox is “Map Import.” This icon will allow you to set up a legend to determine what information will be brought into your approval process from the datastore.

Before you begin setting up the legend, you’ll need to ensure that the approval process is exactly how you want it - once a legend is established, we **strongly** recommend against modifying the fields of the approval process any further as it may negatively impact the integration.

Instead, make a copy of the Approval Process you’d like to modify, and deactivate the old one. All current Proposals will be able to complete their workflows, and any new ones will contain the new changes.

Integration Manager Legends

To allow users the ability to import information into proposals from external sources, you must create a legend that connects your Approval Process to one or more external systems. You can add multiple sources for a single Approval Process, and the user will be given the ability to select the appropriate source from the options you map here.

Please note: before you can connect this AP to a map, you must create at least one map to an external system. To create or update external system maps, go to Settings and click on Integration Settings.

[Add Legends](#)

To allow users the ability to import information into proposals from external sources, you must create a legend that connects your Approval Process to the information that is being housed within Integration Manager’s DataStore. Before you can create a legend, you need to ensure that you have first created a map and run a task.

A Legend will be used to connect this single Approval Process to the information currently housed in the DataStore, so that when a user creates a Proposal, he or she will be able to import information.

Courses and Programs will have a few different fields between them and will be broken into smaller sections for each one.

Rev. [9/2018]

Proprietary & Confidential



Note: Blank type process cannot import or export information to or from Curriculog, so legends can not be created on their approval processes.

Courses

To begin, click “Add Legends.” A new window will appear, with the option to “Create New Legend.” Once you create a new Legend, you’ll be presented with a screen displaying two sets of options.

On the left will be the Reference System. This will be where the data is coming from – in this example, Acalog. On the right, will be the Destination System. This will be where the data is moving into – in this case, Curriculog.

The Legend will allow you to map on a one-to-one basis the Reference System to the Destination System. For example, you may choose to map “Prefix” in Acalog, to “Prefix” in Curriculog so that the data appears within the expected field.

To begin, select the appropriate System from the drop-down menu – in this case, Acalog. Then, select the Map from the drop-down menu that was previously created. Once these options have been selected, the system will attempt to match any fields that have an exact match in the title. You may notice that fields like Prefix, Code, Name and Description often match up immediately.

Occasionally, you have a field that isn’t an exact match in title – but still the correct location for the data. Fields like “Code” in Acalog and “Course No.” in Curriculog are a good example. When this occurs, you can use the drop-down menu to select the appropriate field within Acalog to map the information.

Integration Manager Legends

To allow users the ability to import information into Curriculog from reference systems, you must create a legend that connects the data fields of a reference system to the fields of your Approval Process. You can add multiple sources for a single Approval Process. When you import, you will be given the ability to select the appropriate source from the legends you create here.

Current Legends:

You have no legends established. To create a legend, click on Create New Legend.

[+ Create New Legend](#)

Reference	Destination
System: <input type="text" value="Select Reference System"/>	» Curriculog
Map: <input type="text" value="Select Map"/>	» Course Change - Assessments
Field: <input type="text" value="Please Select One"/>	» Label : <input type="text"/>
Field: <input type="text" value="Please Select One"/>	» Type : Course
Field: <input type="text" value="Please Select One"/>	» Hierarchy Owner
Field: <input type="text" value="Please Select One"/>	» Name *
Field: <input type="text" value="Please Select One"/>	» Prefix *
Field: <input type="text" value="Please Select One"/>	» Code *
Field: <input type="text" value="Please Select One"/>	» Course Type

Field: » **Course No. ***

Programs

From within a program Approval Process, select the “Map Import” icon and click “Add Legends.” A new window will appear, with the option to “Create New Legend.” Once you’ve opted to create a new Legend, you’ll be presented with a screen displaying two sets of options.

Reference	Destination
System: Acalog	» Curriculog
Map: Curriculog Training Catalog	» Shared Core Test
	» Label : <input type="text"/>
	» Type : Program
Field: Parent	» Hierarchy Owner
Field: Please Select One	» Program Type
Field: Name	» Title *
Field: Description	» Description
Field: Curriculum	» Prospective Curriculum

On the left, will be the Reference System. This will be where the data is coming from – in our case, Acalog. On the right, will be the Destination System. This will be where the data is moving into – in this case, Curriculog.

As you are working within a program, you will see that there are several more fields showing than are present within our form. Many of the fields will be auto-filled for you once the reference system is selected; but the next section will explain what each field points to within your form.

The information housed under the “Curriculum” field is used to populate the information that falls into the Cores and Courses information. When setting up the legend in Curriculog, the system will automatically map these for you when you select the related map.

The Legend will allow you to map on a one to one basis the Reference System to the Destination System. For example, you may choose to map “Name” in Acalog, to “Title” in Curriculog – so that the data appears within the expected field.

To begin, select the appropriate System from the drop-down menu – in this case, Acalog. Then, select the Map from the drop-down menu that was previously created.

Once these options have been selected, the system will attempt to match any fields that have an exact match in the title. You may notice that some fields match up immediately – this will happen when the field in Acalog is titled the same as the field in Curriculog.

Occasionally, you have a field that isn’t an exact match in title – but still the correct location for the data. “Parent” is a good example. In Acalog, the hierarchy information is stored in a field titled “Parent,” and will not automatically match for you. When this occurs, you can use the drop-down menu to select the appropriate field within Acalog to map the information.

Field: Parent	» type - Program
	» Hierarchy Owner



You do not need to map every field, either – there are many occasions where a field may exist in Acalog that you do not wish to import into Curriculog, and you can leave that field unselected.

When working with Programs – pay special attention to “Program Type” - both Acalog and Curriculog contain a field titled “Program Type.” However, they are used in two different ways: in Acalog, this is used to denote what kind of program this is (like major or minor) and in Curriculog it is used to indicate if this is a shared core or a program. If they could auto-fill, Acalog will try to populate the field with information from your Item Types module – such as Major, or Minor – when Curriculog is expecting information to determine whether this information is a Program or a Shared Core. When this happens, the user may be confused as to why information is not importing into their proposal. This can be corrected by potentially renaming the Program Type field in the form, which will prevent the auto-fill, or by manually adjusting the drop-down menu for Acalog back to “Please Select One” and leaving it blank.

It is also extremely important to note the field “Curriculum.”

This field is necessary as it contains all the information regarding Cores, Courses, and Ad-Hoc text that will be brought in from Acalog. If you do not provide correct information in the Legend, you will not be able to import Courses into your Programs.

Additionally, once you have provided the Curriculum field – the information under the Core, Course, and Custom Text headings will now also be able to auto-fill.

Once you have matched all the fields you wish to import, click “Save Legend” and close the window.

Once you have completed setting up legends for either course or program processes, you will notice the orange warning that now appears over your approval process – indicating that further modifications may impact the Integration. **This will serve as a reminder that once a Legend is established, we strongly recommend against modifying the fields of the Approval Process any further as it may negatively impact the integration.**

		» Type : Core
Field:	Name	» Name *
Field:	Code	» Code *
Field:	Please Select One	» Id
Field:	Description	» Description
Field:	Curriculum	» Curriculum
Field:	Status	» Status
		» Type : Course
Field:	Prefix	» Prefix *
Field:	Code	» Code *
Field:	Name	» Name *
Field:	Please Select One	» Id
		» Type : Custom Text
Field:	Name	» Name *
Field:	Description	» Description
Field:	Please Select One	» Id
Field:	Position	» Position
Field:	Credits	» Credits

Warning: Edits may affect Integration

This Curriculog system has Integration Manager enabled. Modifications to the Approval Process will render any maps and legends associated with this Approval Process invalid and may affect integration between Curriculog and other applications. It is better to make a copy of this Approval Process and make your changes there. If you are unsure of the meaning of this message, please contact Digarc Customer Care first.

Instead, make a copy of the Approval Process you’d like to modify, and deactivate the old one. All current Proposals will be able to complete their workflows, and any new ones will contain the new changes.



Launching an Approval Process

After you have completed all modifications to the form, steps, and legends of your approval process – it will be ready to launch. Launching an approval process will make it available to users to select and begin using as a proposal. To launch an approval process, click the launch icon ▶ from the upper left corner.

A dialogue box will display prompting you to confirm you would like to launch the approval process. Once the approval process has been launched it will be available to users as a new proposal template. Select “Launch Process” to confirm.

Once it has been launched, users will be able to make Proposals based on this process immediately.

Note: Once a proposal begins based on this approval process, you will not be able to make any changes to the workflow of the existing proposals. They will continue the workflow they have set out on until they complete, or until you delete them from the system.

Editing an Existing Approval Process

Note: If you have attached a legend to your approval process, we strongly recommend that you do NOT modify an approval process after it has been launched as it may have negative impacts on your integration. Instead, we suggest that you make a copy of it, deactivate the old one, make edits and then launch the copy.

If you have already launched an approval process and find you need to make additional edits, you may do so by selecting the edit icon ▾ in the list of approval processes.

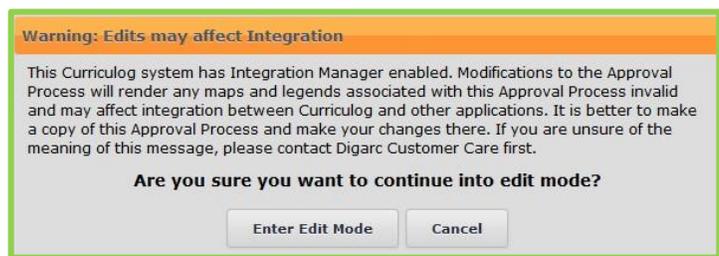
This will bring you to view the approval process as it currently exists – you won’t be able to modify it just yet. From this view you will be able review the form, but instead of edit icons you will see help icons allowing you to review the field options. Each area of the Approval Process Toolbox will be accessible and visible but will remain unable to be modified.

To make any changes, you will need to bring the approval process into Edit Mode by clicking the edit icon ▾ from the upper left corner.

Clicking this will prompt another reminder that modifications made may have negative impacts within your integration.

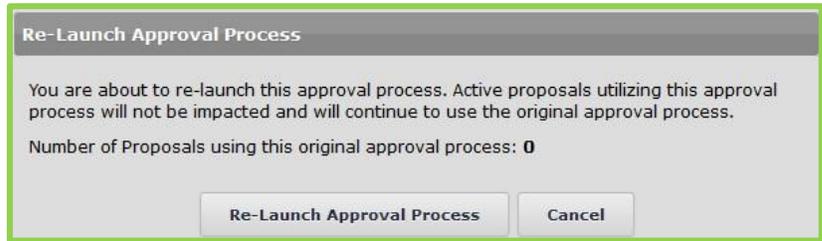
Once you click “Enter Edit Mode” you will be able to make any necessary changes to the approval process. Any changes that you make will not be made available until you re-launch the approval process when your edits are complete. All currently active proposals will continue with the approval process in its state at the time of the proposal being launched and cannot be modified. You will need to click “Enter Edit Mode” to continue.

Note: Edits will only affect proposals created after this approval process has been relaunched.



Once in Edit Mode, you will be able to add fields, edit existing fields, manage your steps, crosslisting options if eligible, and the available legends.

After you've made all changes to the approval process, you will need to re-launch the approval process by selecting the launch icon  again. Selecting to re-launch the approval process will display a dialogue box indicating how many proposals are currently using the original process.



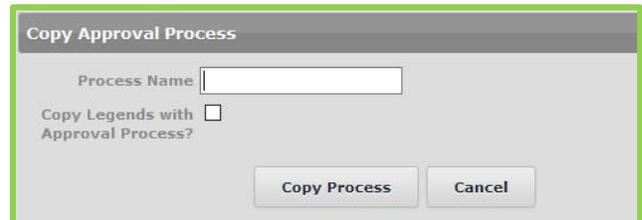
Copy, Deactivate/Reactivate and Delete an Approval Process

Curriculog contains additional options for managing your Approval Processes – from allowing you to copy an existing one to save time, or being able to deactivate them to prevent use, or even delete them from the system.

Copy an Approval Process

You have the ability to copy an approval process rather than needing to create one from the defaults each time. This is especially handy when you are creating a new one for each semester year as suggested by our best practices, and you are keeping your forms largely the same. You can copy any active approval process from the list of approval processes. When you hover over the approval process, and you'll see a set of icons that appear to the far right. Next to the edit icon  is the copy process icon .

Selecting this icon will display a dialogue box where you may enter a new process name (you cannot have two processes with an identical name) and select "Copy Process" to complete the action. Your copy will be an exact duplicate of your previous Approval Process, and you will not be able to change the type.



There is also a checkbox allowing you to indicate if you would like to copy the legend with the approval process as well. In some instances, such as make a copy of an approval process for next year's catalog, copying the legend is not beneficial – it would be linking your new process to your old catalog. This option allows you to remove the legend when the process is copied, so that you can create a new one and connect to the appropriate catalog.

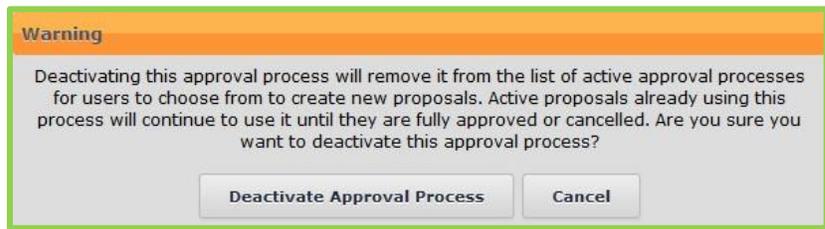
In some cases, however, such as when you are following our best practices and making a copy of an approval processes in order to make changes to a form – you may choose to keep a copy of the legend so that the majority of the fields are already mapped and then be able to make changes as needed to the map in the new copy.

Once the copy has been completed, you will see the new approval process listed within your available approval processes and you can edit it as you see fit.

Deactivate/Reactivate an Approval Process

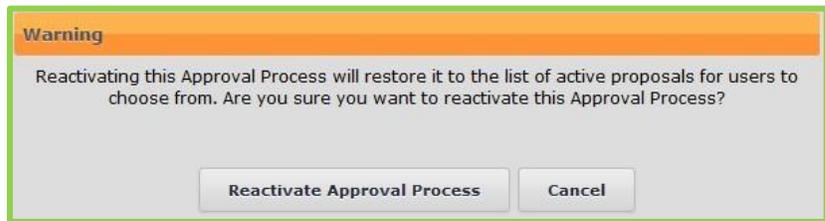
You may deactivate an approval process rather than completely removing it from the system. Approval processes that have proposals still in progress will be unable to be deleted until the proposals are completed, so this may be the only option until they have completed. Deactivating a process will prevent users from selecting the process and being able to create proposals based on it. The deactivate icon  will appear to the right of the copy icon.

Selecting “Deactivate Process” will display a dialogue box warning you that deactivating the process will remove it from the list of active approval processes users may select from. If the process is currently in use by any active proposal, that proposal will continue to use the process until they are fully approved or cancelled. To confirm, select “Deactivate Approval Process”.



Once an approval process has been deactivated, you will not be able to edit or copy it. The name of the process and its steps will be grayed out in the list of approval processes. The only actions you will be able to take for a deactivated approval process is to either reactivate the process or delete the process.

Selecting “Reactivate Process” will display a dialogue box warning that this action will return the process to the list of approval processes available to users. To continue, select “Reactivate Approval Process”.



Note: Deactivating a process will NOT affect existing proposals – it will only prevent new ones from being created.

Delete an Approval Process

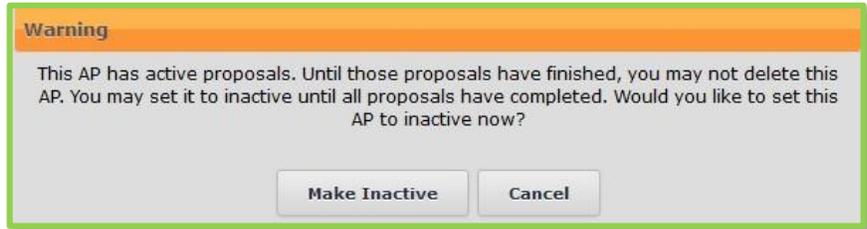
To delete an approval process, select the blue “x”  in the list view of processes.

When you select to delete an approval process, a dialogue box will open warning you that this is a permanent action. To confirm, select “Delete Approval Process” and the process will be removed from Curriculog.





If the approval process has active proposals, it will not be able to be deleted - however, you may make the approval process inactive. Marking it inactive deactivates it and prevents users from creating additional proposals.



Once all active proposals have completed, the approval process can be deleted.

Note: *Deleting an approval process is a permanent action and cannot be undone.*

PROPOSALS

The Proposals Module is where you will respond to requests within proposals, review all approved proposals to mark them ready for export, and provides a list of all active proposals.

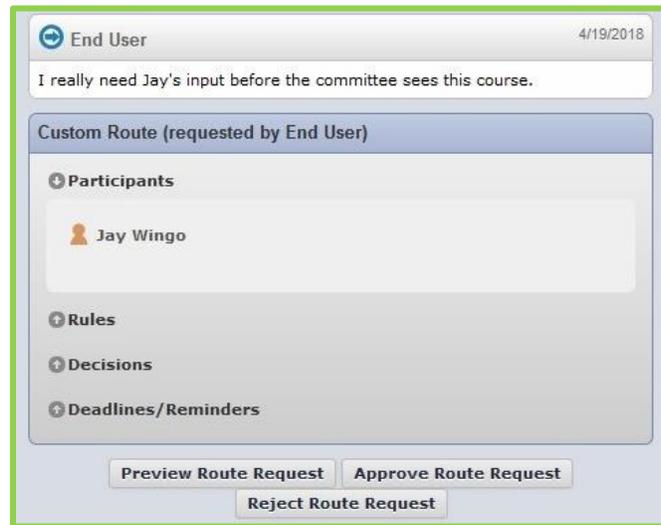
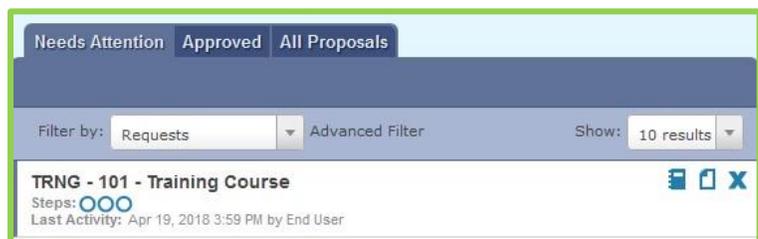
Needs Attention

The Needs Attention tab will list proposals requiring your attention in some fashion, which may include hold or custom route requests.

The default filter will indicate “Requests,” which will include Custom Route, Hold, and Suspend requests if you have made them available on a step. When a user requests one of these options, they will be listed here for you to review.

When you click on the item, a flyout will appear allowing you to review the details of the request. If the item is a Custom Route, you will see the comments entered by the user requesting the Custom Route, the step they are proposing, and you will have an option to approve or reject the route request.

If you have proposals that are currently on hold or that have been suspended, you can review them by using the drop-down menu to display proposals with the corresponding status. When the flyout appears, you will have the option to remove the hold or suspend status.



If you have proposals that are needing to be reviewed because of a crosslisting, and you have enabled the setting to require administrative review of crosslistings within your Settings, you can review them by using the drop-down menu to display the “review” option to see proposals with that status.

When you select a proposal, the flyout will appear giving you the option to review the crosslisting and primary proposals, and then to approve the request.

Once any request has been granted, it will be removed from the Needs Attention tab and the proposals will continue in their workflows.

Approved

The Approved tab will list all proposals that have completed the approval process. Completed proposals will have a padlock symbol next to them – this indicates that the item has been locked and no further modifications of any type may be made to this proposal. This includes administrators, and Digarc. Proposals are locked at the state of completion to preserve their integrity – if additional modifications to items are needed a new proposal may be necessary.

Note: As a suggestion, many institutions include an admin step on the final step of the workflow to allow them an opportunity to review the proposal one final time before completion.

Clicking on them will allow you to review the summary in the flyout, or you can click the view proposal icon to be taken to the User Dashboard to view the entire proposal. As an administrator, you also have the ability to delete a proposal from the tab by selecting the blue “x” icon. Deleting a proposal will remove it from the system immediately – this should be considered a permanent action there is not an option to restore a proposal that has been deleted.

The last icon is to mark a proposal ready for export . Marking it ready for export will allow Integration Manager to see this information so that the next time a task is run, the information will be included in the updated cache. Once marked as ready, it cannot be undone.

The advanced filter at the top can be used to locate processes by entity, type, process, date range or status. More details on the advanced filter can be found under the All Proposals section.

ACCT - 433 - Internal Control Systems

Review Crosslisting

This proposal has a crosslisting that requires your review. Please review this proposal and its children crosslisting, and confirm the launch to send the proposal into its approval process, or reject the proposal to send it back to the originator.

This crosslisting is set to the Independent option. Primary and Crosslisted Proposals exist on their own timelines, and any decisions made to one will have NO impact on any others.

Related Crosslistings Include: [IT - 433 - Internal Control Systems](#).

Needs Attention
Approved
All Proposals

Filter by: All Approved
Advanced Filter
Show: 10 results

ACC - 200 - Fundamentals of Financial Accounting

Steps:

Last Activity: Aug 3, 2017 11:46 AM by Michael Pazda

All Proposals

The All Proposals tab will list all proposals in the system regardless of status. Selecting the View Summary icon  will display a flyout on the right side of the screen granting options for the administrator to Force Approve or Force Reject a proposal.

If an administrator selects either of these options, you will be prompted with a window asking if you would like to provide a comment with your decision – many institutions choose to provide an explanation regarding their decision to Force Approve or Force Reject a proposal. Once the decision has been entered, the proposal will either advance to the next step, or it will follow the steps rejections route.

ART - 200 - History of Art I

Force Proposal

This proposal has been on the current step, Committee Step for **4 days**. You may force the proposal past this step by either forcing an approval or forcing a rejection below.

Approving a Proposal

Would you like to leave a comment with your decision?

Note: Be sure to only click **once** when entering the decision! Rapid-fire clicking may result in a duplicate comment on the proposal.

As an administrator, you also have the ability to delete a proposal from the tab by selecting the blue “x”  icon. Deleting a proposal will remove it from the system immediately, and there is not an option to restore a proposal that has been deleted.

Warning

Deleting this Proposal will permanently remove it from Curriculumlog. Are you sure you want to delete this Proposal?

When a proposal is deleted, there is no record or history of the proposal or its deletion – all information related to that proposal is removed from the system entirely.

Advanced Filter

The advanced filter provides the best way to search through Curriculog and offers several different filtering options; and the options on the filter vary slightly depending upon where you are viewing the filter from.

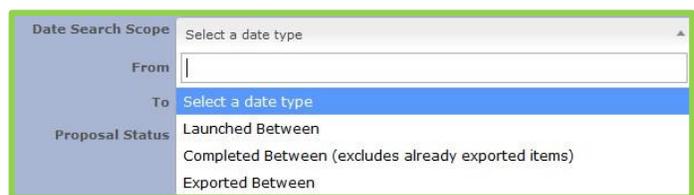
- Found Under** Selecting a hierarchy entity in this drop-down menu would return all proposals created using the same hierarchy entity. By default, the search is limited to only this entity – but if you check the “include all child entities under my selection”, it will broaden the search to include all entities owned by the one listed in the drop-down.
- Process Type** This option allows you to narrow results by choosing one of the three types: course, program, or other; or by listing proposals created based on one of your individual approval processes
- User Role (User Dashboard)** This option provides a list of all roles assigned to the user. When the user selects a single role as a filter, only proposals whose current step includes the user as a participant for that role will be returned.



Note: This will only search the Roles of the account you are logged in as; you can not search the roles of a specific user.



- Current Step Name** This option provides a list of all steps in the system by default. When the user selects a single step name, only proposals whose current step is of the same name are returned. If the user has also applied the Process Type filter (selecting a specific approval process or type of process such as Course), the available options under the Current Step Name filter will be restricted to only those available for the Process Type selection.
- Date Search Scope** If you would like to search based on a date range, this allows you to select what the dates are based on. The options available in the drop-down menu are:

- Launched between** Would list proposals that the originator launched between the dates specified
- Completed Between (excluded already exported items)** Would list proposals that have completed their workflow between the dates specified, but would not include any items that have already been marked for export
- Exported Between** Would list proposals that were marked ready for export between the dates specified

Note: *Curriculog relies on the date items were marked as ready for export when it refers to an exported date. This means the date that you have marked the ready for export  flag next to a completed proposal.*

- **From** Enter the date ranges you would like to search on. Clicking in the field will bring up a small calendar allowing you to click on a specific date

Note: *The system will not allow you to manually key in a date. It must be entered using the calendar selection tool.*

- **Proposal Status** Allows you to limit the number or results based on the status of the proposal
 - **Unlaunched** (*User Dashboard, You are originator*) Proposals that you have originated but have not yet launched
 - **Reviewing** Proposals in which an administrator has been asked to review a request, such as a crosslisting or a Custom Route
 - **Active** Proposals that are actively progressing through their workflow
 - **Held** Proposals that have been placed on Hold, allowing the users on the step to continue working on the proposal until the administrator lifts the hold status
 - **Suspended** Proposals that have been suspended and will allow no further work to be done on them until the suspension status has been lifted
 - **Cancelled** Proposals that have been requested to be cancelled; yet have not been deleted by the originator
 - **Waiting** Proposals that are waiting for an additional action, such as a dependent crosslisting waiting to move to the next step
 - **Completed** Proposals that have completed all steps of the workflow
- **Requests** These will be proposals that have are waiting on a response to a request for an additional decision flag from an administrator. You can read more on the individual decision flags under [Decisions](#).
 - **Request Hold**
 - **Request Suspension**
 - **Request Cancellation**
 - **Request Custom Route**
- **Step Participants** Will list any proposals that are missing participants on steps because of changes made to the hierarchy
- **Time Sensitivity**
 - **My Urgent Tasks** (*User Dashboard*) Will list any proposals that have crossed the Urgency threshold where you are an active participant on the current step
 - **My Tasks with Deadlines** (*User Dashboard*) Will list any proposals that you are an active participant on the current step with an upcoming deadline
- **Stuck Proposals** Will list any proposals that have crossed the Stuck threshold
- **Keyword** Will search keywords only within the titles of the proposals

Glossary

Accounts Module: Module to manage user accounts and permissions. Accessing from the Administrator Dashboard provides user account management functionality allowing account creation and management of roles while access from the User Dashboard is restricted to contact information for other users and a permissions overview for the user's own account.

Administrators: System Administrators; Users who have the highest level of authority and access within the Curriculog system. A user designated as an administrator will have permissions to manage system settings and may participate in the proposals along with users.

Agendas Module: provide functionality to create a meeting agenda for discussing proposals that require a committee as a part of the approval process. A committee may be made up of several individuals which Curriculog will split into two groups: non-voting members and Agenda Administrators.

- **Agenda Administrators:** If you are designated as an Agenda Administrator, your name will appear with an asterisk beside it on the step and you will now be responsible for placing a vote on behalf of the committee and have the option for creating an agenda if one is needed. Non-voting members may place opinions on the step, but only the votes of the Agenda Administrator will be counted. There may be more than one Agenda Administrator on a step if the administrator chooses, and in that case all users designated would be required to vote for the step to advance.
- **Non-Voting Members:** Users on the proposal may edit or comment if the step allows, however rather than providing a decision you are providing an opinion. You may place the opinion to indicate your preference for an approval or a rejection, however your vote is not counted towards the final approval or rejection. Only users serving as the Agenda Administrator will have their votes counted.
- **Agendas:** Functionality to create a meeting agenda for discussing one or more proposals for a committee to review, allowing for quick decision making directly on the agenda.

Approval Process: A template of fields used to collect information from the end user, and a set of steps to drive a workflow.

- **Form:** A collection of fields used to gather proposal data from the end user.
- **Steps:** Configurable points of approval within a proposal's lifecycle. May involve committees, commenting, voting, signatures, specific deadlines and custom routing.

Approval Process Module: Approval Processes (quite commonly abbreviated to "AP") are Curriculog's core. They will dictate the fields of the form and all the steps in the workflow. In the Approval Processes Module, you will be able to manage all of the approval processes within your system.

Assessments: an optional module whose functionality is to add and manage learning objectives and expected outcomes that may be attached to course and program proposals.

Crosslisting: functionality to allow users to establish course proposal relationships.

- **Independent:** parent and crosslisted proposals exist on their own timelines, and any decisions made to one will have NO impact on any others.
- **Dependent:** parent and crosslisted proposals wait for each other on each step until every user decides. Any decision other than approve affects ALL proposals (reject, hold, cancel, etc.).
- **Parent:** parent and crosslisted proposals are independent EXCEPT if the parent receives any decision other than approve, crosslistings will also receive the same action. However, decisions made on the crosslisted proposals do not affect the parent. If the crosslisting is further advanced than the parent, it will return to the same rejection point as the parent, and its rejection will be recorded in its status.

Cores: A combination of descriptive text and/or list of courses that may be created within programs.

Custom Text (ad-hoc text): A custom text displayed between, or next to, courses in shared cores and in program cores. This may also be called Interstitial Course Information.

Curriculog University: Online help resource available to all users through a link at the footer of every page within the system after logging in.

DataStore: Where data from the reference system is cached to allow for easy retrieval by the destination system.

Dashboard:

- **Administrator Dashboard:** The Administrative interface that provides access to system configuration and management functions. It is distinguished from My Dashboard (the primary user interface) by a thin red line above the content area. The Administrator Dashboard defaults to the Proposals Module which provides access to the following tabs:
 - **Needs Attention:** A list of items waiting for action from the Administrator.
 - **Approved:** A list of approved proposals.
 - **All Proposals:** A list of all proposals in progress.
 - **Recent Notifications:** List of notifications which consist of status updates.
 - **Upcoming Events:** Curriculum related calendar events, such as proposal deadlines, holidays and committee meetings.
- **My Dashboard:** The primary user interface that provides access to end user functions. It is distinguished from the Administrator Dashboard (the Administrative interface) by a thin blue line above the content area. My Dashboard defaults to the Proposals Module which provides access to the following:
 - **My Tasks:** A list of items waiting for action from the user.
 - **My Proposals:** A list of proposals originated by the user (unlaunched and launched).
 - **Watch List:** A list of proposals the user has elected to monitor.
 - **All Proposals:** A list of all proposals available for viewing to the user (transparency and permissions apply).
 - **My Recent Notifications:** List of notifications which consist of status updates.
 - **My Upcoming Events:** Curriculum related calendar events, such as proposal deadlines, holidays and committee meetings.

Decision Flags: options other than approve/reject that may be allowed on steps; these decisions flags are all sent as requests to the System Administrators for approval.

- **Hold:** Users in the step will be able to continue work on the proposal, however, it will not advance in the workflow until the hold is removed by an Administrator.
- **Suspend:** No work may be done on the proposal and it will not advance in the workflow until the suspension is removed by an administrator.
- **Cancel:** The proposal will be sent back to the Originator in an unlaunched state; the Originator may then cancel and delete the proposal.
- **Custom Route:** Creates an ad-hoc step in the process to include additional participants.

Done Watching Proposal: Allows you to stop tracking the proposal and removes it from your Watch List.

Edit Mode: To make changes to an approval process, it will need to be placed in Edit Mode. While an approval process is in Edit Mode, it is not available for creating new proposals. In addition, any changes made to the approval process will only affect proposals going forward after the re-launch.

Edit Proposal : Available only if you are an active participant on the current step. Directs you to the proposal, where you may make modifications and enter your decision on this proposal depending upon your permissions.

Entity Types: Used to differentiate various types of Hierarchy items. (Example, a College could be used for 'College of Arts and Sciences' and Department could be used for the 'Art Department' as the Entity Types.)

Guests: Anyone who visits the Curriculog site but does not log in to the system. Guests are unable to make any changes to content, provide comments, or modify proposals. Guest access may be modified by the administrator.

Hierarchy: Academic organizational structure, comparable to the Acalog hierarchy.

Hierarchy Module: The Hierarchy Module allows you to manage hierarchy entities, and entity types, role types, roles, and committees associated with them.

Integration Manager: Integration Manager is a product designed by Digarc to move data between systems. Not only can it move information between Acalog and Curriculog, but it can also move information to and from an external system

Legend: Allows administrators to determine how Integration Manager will pull data out of the DataStore and into the correct fields in the destination system.

Maps: Used to instruct Integration Manager how to store data in the DataStore from a reference system.

My Settings: User settings that an individual may control relating to notifications and signatures. *(Some of these can be overridden at the administrator level).*

Notifications: E-mails sent to the user either individually or in a compiled digest depending upon settings; based upon triggers throughout the system to notify them of events that have occurred or actions that are needed.

Permissions: User accounts may be assigned specific permissions by an administrator to allow the user to access specific data in the system.



Process Summary:

- **When viewed from proposals:** The Process Summary displays form fields (configurable), comments and approval process history.
- **When viewed from approval processes:** The Process Summary shows Process Steps.

Program Map: Available within a program proposal, this functionality allows you to compare the expected outcomes assigned to a program with the learning objectives assigned to the courses within the program to assess if the expected outcomes are being met effectively.

Proposal: Proposals are the forms that travel up the approval chain. Each proposal form has a specific approval process tied to them in a 1:1 relationship.

Proposals Module:

- **Administrator Dashboard:** The Proposals Module is where you will respond to requests within proposals, review all approved proposals to mark them ready for export, and provides a list of all active proposals.
- **User Dashboard:** Where all users will manage the proposals and interact with them throughout their workflows

Remote Authentication: commonly referred to as 'SSO' or single-sign-on. This will allow users to authenticate using credentials already established within your institution. For information on options regarding compatibility and requirements, please contact support@digarc.com

Reports: Functionality for gathering, analyzing and compiling a variety of curriculum data.

Reports Module: Allows the you to generate reports on proposal activity within Curriculog. The reports available to you are determined by the administrator.

Roles: Specific designations of role types within a hierarchy entity. (Example: Dean of the College of Arts and Sciences, Chemistry Department Chair)

Role Types: Non-specific units associated with approval steps (Example: Dean, Department Chair).

Send message about Proposal: Allows you to send a message to another Curriculog user. The e-mail will be pre-populated with a link to the proposal you were reviewing, and will allow you to include one or more users, as well as a copy to yourself. Curriculog does not store a copy of any e-mail.

Settings Module: The Settings module will contain several tabs for configuring various aspects throughout Curriculog.

Shared Core: A core created and maintained within one area of the database that may be added to any program in the system.

Signature Pin: A pin provided to the user to stand as their digital signature. The pin may be assigned by the Administrator, or permission may be granted to the user to edit their own pin.

Smartfield: A type of field within the form requiring the user to select an option from a predetermined list provided by the administrator. (Example: Prefix or Course Type)

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Steps: Configurable points of approval within a proposal's lifecycle. May involve committees, commenting, voting, signatures, specific deadlines and custom routing.

Stuck: Configurable option to set a threshold, and once a proposal has passed this threshold, it will display as "stuck" on the Administrator Dashboard as a proposal requiring attention. The system will send the administrator a notification to alert them to the new status of the item but will not take any automatic action on their behalf.

Urgency: Configurable option to set a threshold, and once this threshold is reached, the proposal will display in the "My Tasks" tab with an orange exclamation point to mark the item as "Urgent." The system will send the user a notification to alert them to the new status of the item but will not take any automatic action on their behalf.

User Tracking: Allows users to see changes that have been made to a proposal after it has been launched.

Transparency: Allows administrators to determine the tabs guests may view, the comments that will be displayed and what reports will be available to users. Transparency is controlled by the administrator.

- **Full Transparency:** Guests CAN view proposals and agendas; logged in Users CAN view proposals and agendas; System Administrators CAN view proposals and agendas.
- **Authenticated:** Guests can NOT view proposals or agendas; logged in Users CAN view proposals or agendas; System Administrators CAN view proposals and agendas.
- **Restricted:** Guests can NOT view proposals or agendas; logged in Users can only see proposals and agendas they are involved in or watching; System Administrators CAN view proposals and agendas; reports are limited to System Administrators only.

Users: Individuals granted access to the system for the purpose of directly participating in the curriculum process.

View Summary - Will create a flyout on the right pane displaying information relevant to the proposal. The same flyout will appear by clicking anywhere within the proposal's row in addition to the icon. The fields that appear in the Process Fields section will be determined by your Administrator.

Watch Proposal: Allows you to keep track of a proposal in progress by listing under the Watch List tab, even if you are not a participant on any step

Icon Library

-  - Help
-  - Print
-  - Delete is Disabled
-  - Contract
-  - Search
-  - Edit
-  - Launch
-  Drag and Drop
-  - Calendar
-  - Delete
-  - Expand
-  - Warning

USER DASHBOARD

Proposals

-  - Urgent
-  - Send message about Proposal
-  - Show Edit with Markup
-  - Save all Changes
-  - Locked against editing
-  - View Curriculum Schema
-  - My Current Decision
-  - Summary
-  - Watch Proposal
-  - Import
-  - Toggle Full Width
-  - View Crosslisted Proposal
-  - View Curriculum Courses
-  - Edit Proposal
-  - Done Watching Proposal
-  - Step Restart
-  - Program Map
-  - View Proposal
-  - Curriculum Preview
-  - Approved
-  - Held
-  - Cancelled
-  - Rejected
-  - Suspended
-  - Multiple Decisions

Proposal Toolbox

-  - Discussion
-  - Files
-  - Crosslisting
-  - Status
-  - Decisions
-  - Signatures
-  - Custom Route

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Agendas

- View Agenda Summary
- Complete Agenda
- Archive Agenda

- Edit Agenda
- Publish Agenda

- Unpublish
- View Agenda

ADMINISTRATION

Smartfield Settings

- Deactivate Dataset
- Activate Dataset

Hierarchy

- Role Type
- Committee
- Role
- Entity Type
- User

Approval Process Toolbox

- Steps to Approval
- Add Title
- Crosslisting
- Map Import
- Copy Process
- Deactivate Process
- Preview Form
- Legend out of date

Proposals

- Mark ready for export