CURRICULOG COURSE PROPOSAL & APPROVAL PROCESS

Faculty Guide



California State University
SAN MARCOS

Academic Programs

Curriculog Login: https://csusm.curriculog.com
Use Chrome, Firefox or Safari browsers. Not compatible with Internet Explorer.

REVISION CONTROL

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Curriculog Overview

What is Curriculog?

Curriculog is CSU San Marcos's online Curriculum Management System that was implemented in Spring 2018 for all curricular proposals. While Curriculog replaces all paper with electronic forms, the development and review of curriculum remains a faculty-driven process.

What are the key features?

Curriculog creates the ability to:

- Collaborate. This is designed for shared development and review of curriculum.
- Track the real-time progress of proposals. You never have to wonder what happened to your paperwork. Decisions, comments, and committee votes are recorded at each level of approval.
- Coordination: See what's being proposed by other departments and offer comments or suggestions

What happens after I submit my proposal?

Once proposals are submitted, they will be routed through approvals which include the chair, dean, curriculum committees, Academic Programs, BLP, GEC (as appropriate), DECC (as appropriate), and Senate. Once they receive final approval, Academic Programs will export into Acalog, our University Catalog system.

Where can I get training and support for Curriculog?

Contact	Email
Criselda Yee Curriculum Specialist www.csusm.edu/academic_programs	cyee@csusm.edu
Rebecca Romine Catalog and Curriculum Coordinator www.csusm.edu/academic_programs	rromine@csusm.edu
Regina Eisenbach Dean of Academic Programs www.csusm.edu/academic_programs	regina@csusm.edu

Get to Know Curriculog

What is my role in Curriculog?

Faculty / Originators	Department Chair and Dean's Office Reviewer	Committee Chair / Committee Reviewer / Department Reviewer
Responsible for creating and launching the new proposal. May create custom routing to collaborate with colleagues on curriculum being developed.	Responsible for reviewing, commenting on, and approving (or requesting more information) on the launched proposal.	Responsible for reviewing, commenting on, and/or requesting more information on the launched proposal. Only committee chairs/designee will record the committee decision on the proposal.

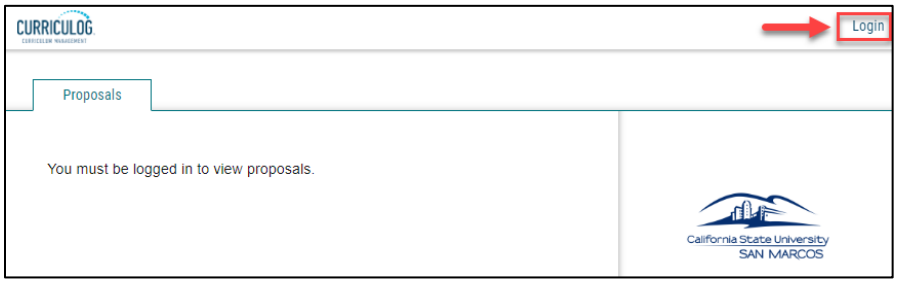
What do I need to know first?

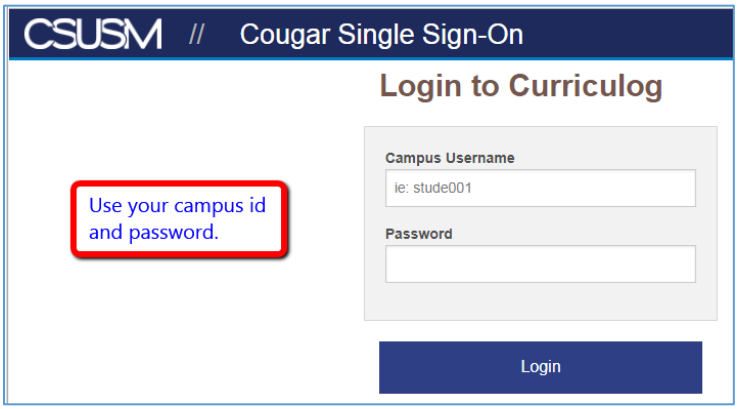
- The system will automatically email those needing to review and/or approve curriculum.
- Use Chrome, Firefox, and Safari but NOT Internet Explorer as your web browser.



How do I log into Curriculog? URL: https://csusm.curriculog.com.

Login is in the upper right corner.

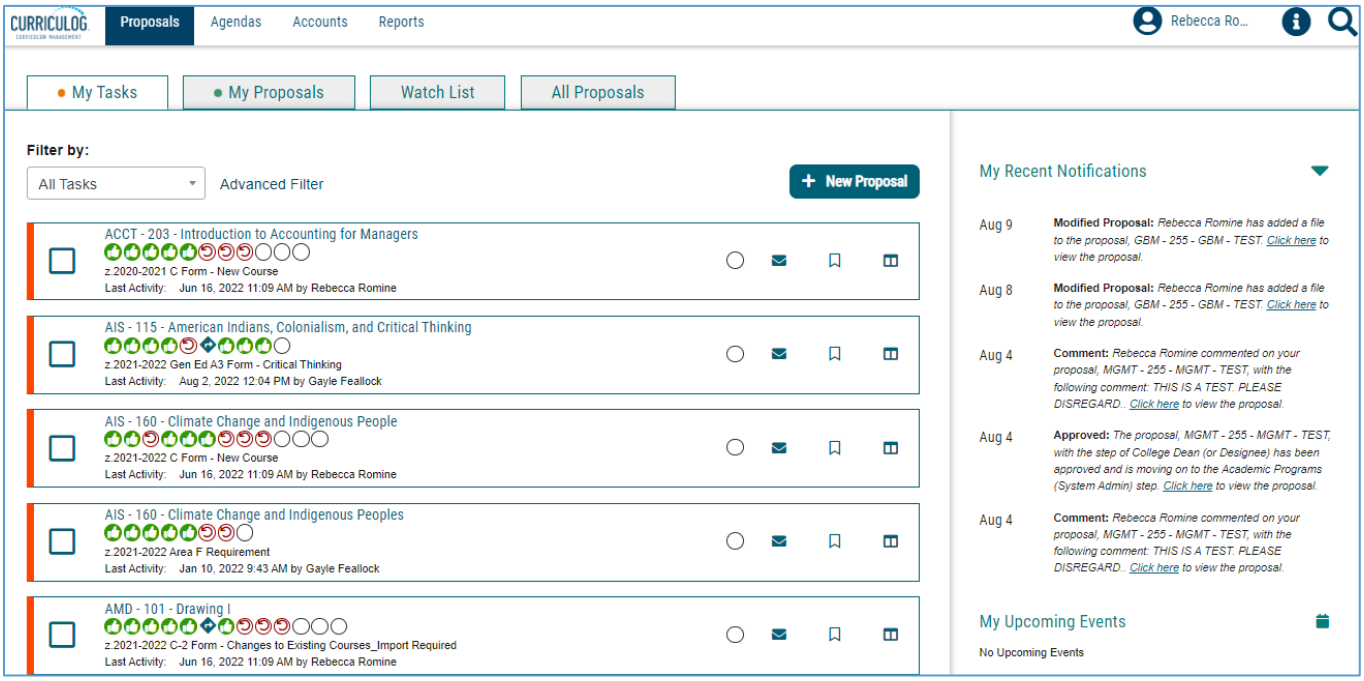




No account? If you are unable to create a new proposal once you log in, have your chair submit your name to curriculog@csusm.edu to gain access.

What will I see when I first log in?

Once you have logged into Curriculog, one of the first screens you will see on the right is **'My Dashboard'** which provides recent notifications and upcoming events at a glance.

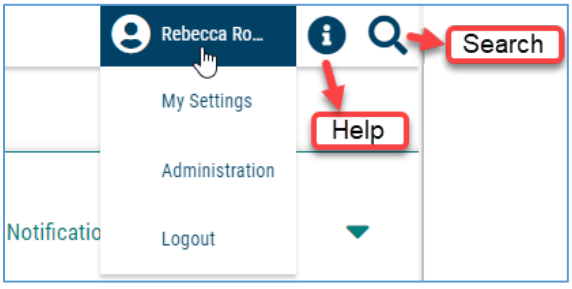


Across the top of the page on the left you will find a persistent toolbar from which you may access the **Proposals**, **Agendas**, **Accounts**, and **Reports** modules.

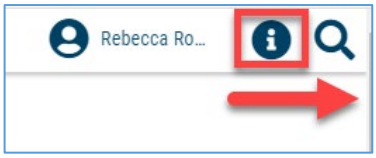


In the upper right corner, there are selections for your own user account listed below the dropdown menu, giving you options for **My Settings** (selecting My Settings will redirect you to the Accounts Module from the top menu), and **Logout**.

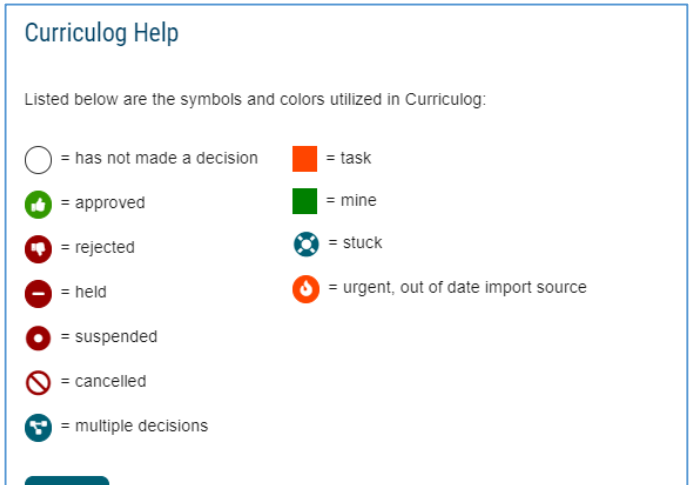
Following your name are "**Help**" and "**Search**" icons.



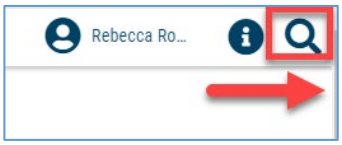
Curriculog Help



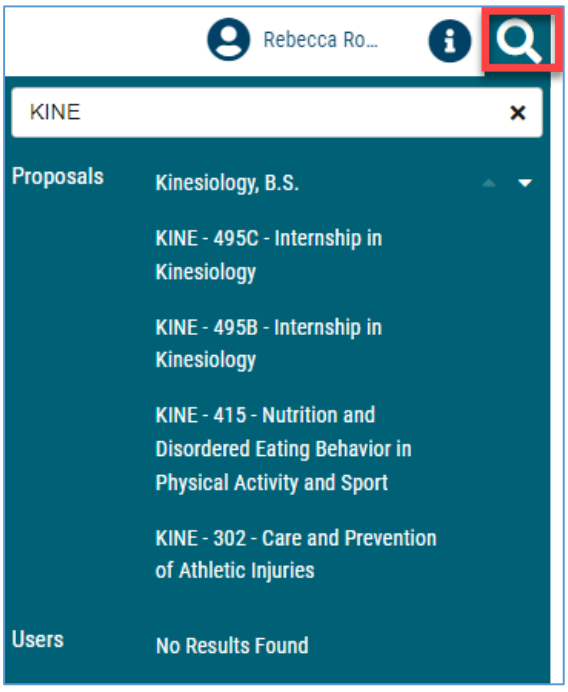
Selecting “Help” will display a window featuring symbols and colors utilized in Curriculog.



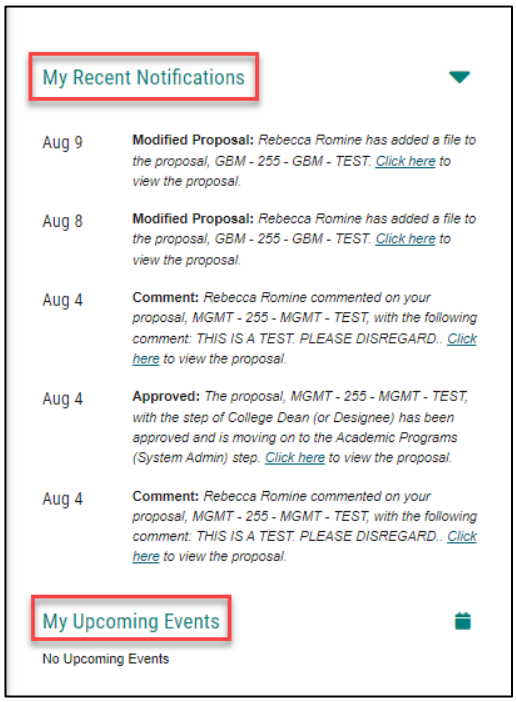
Search



The search function may be used to locate proposals or users throughout the system.



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



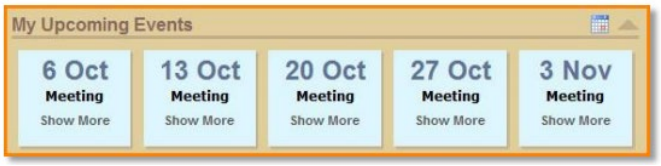
What are "My Recent Notifications?"

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 based on e-mail settings – some will 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.

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 see more notifications, click the arrow in the upper right corner to scroll through them.

What information does "My Upcoming Events" provide?

My Upcoming Events will list the next five upcoming items on your calendar. This may include deadlines within your proposals, proposal due dates, or upcoming training opportunities. To view the full calendar, select the calendar icon in the upper right corner.



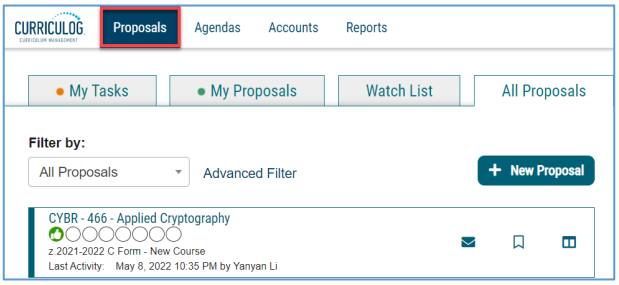
Selecting one of the upcoming events will expand to show additional details.

The calendar included with 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.

NOTE: Cal State San Marcos does not use the deadlines or due dates features in Curriculog, so no upcoming event will populate in this section.

What is a proposal?

A proposal is a form (such as the C, C-2, P or P-2, etc.) that follows a workflow to receive an approval. Proposals may be used to make changes to a course or program, or even introduce new ones. Selecting the **Proposals** module from the top navigation menu will populate the left pane with options relevant to managing proposals.



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

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

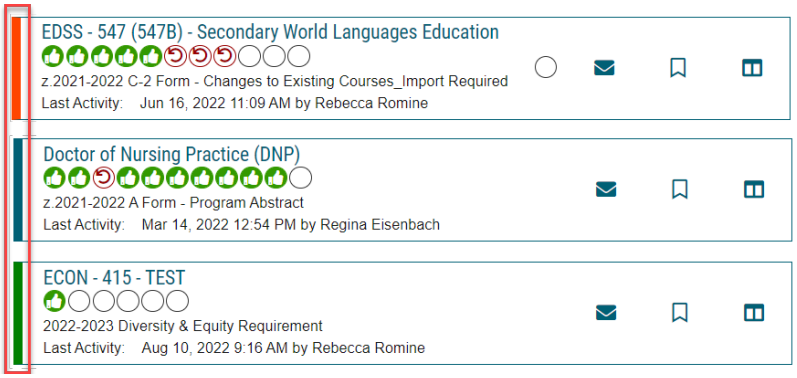
Below these tabs is the 

link. Selecting New Proposal will open the workflow to create a new proposal.

What do Curriculog Colors and Icons mean?

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.

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



Icons that may be associated with proposals are outlined below:



Urgent: A task is considered urgent if a time threshold, which was set by an Administrator, has passed.



View Summary: Creates a flyout on the right pane displaying information relevant to the proposal.



Send message about Proposal: allows you to send a message to another Curriculog user with a direct link to your proposal. (Emails are not maintained within Curriculog.)



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



Done Watching Proposal: Allows you to stop tracking the proposal.



My current decision: This icon will change based on what decision you have made on the Proposal. You can click the help icon for a key to what the different decision icons mean.



Delete a Proposal: Deleting a proposal will permanently remove it from Curriculog. Proposals cannot be deleted after they have been launched 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 or by contacting your Administrator.



Step Restart: A restart may occur when the users involved in the step are replaced with another user.

How to Start and Launch Proposals

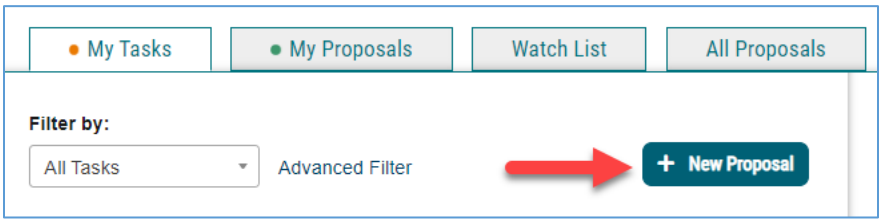
How do I select, start, and launch a New Proposal?

Step 1: Go to csusm.curriculog.com

Step 2: Read through the instructions on the "Welcome" page and note important dates.

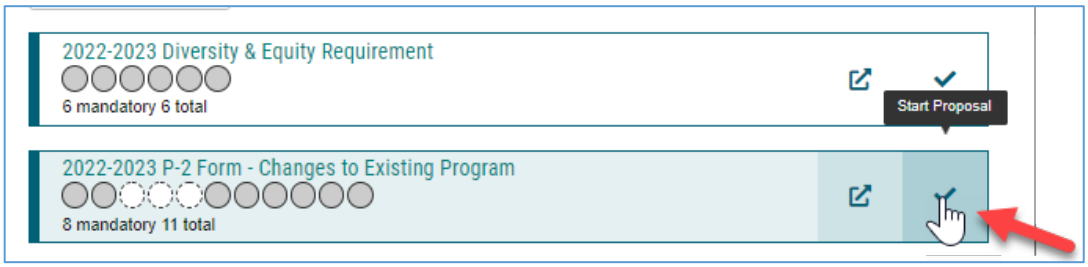
Step 3: 'Login' (top right) will take you to CSUSM login. Enter your Campus ID and password.

Step 4: Click the *New Proposal* link to create a new proposal.



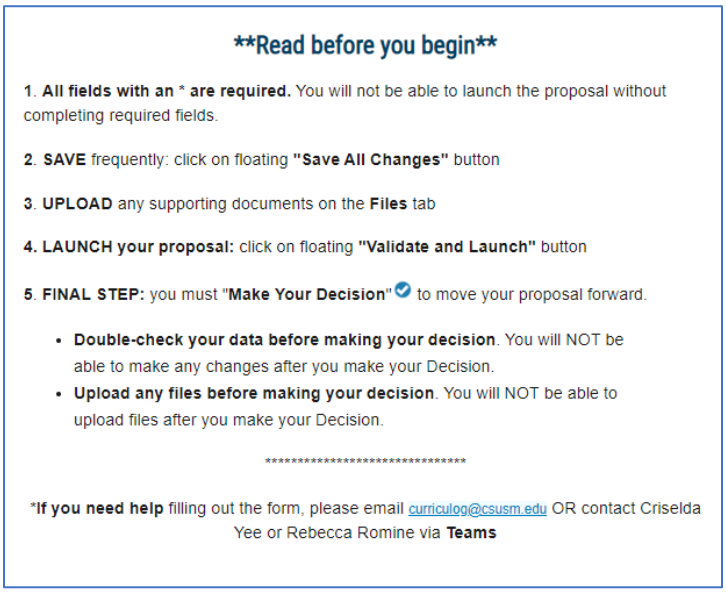
Step 5: Select the form for the appropriate process.

Step 6: Click ☑ on the right side to Start Proposal.



6.a For C-2s, refer to "How to do a C-2" guide or see Page 17 before starting your proposal.

Step 7: IMPORTANT: Read the ****Read Before You Begin**** section.



****Read before you begin****

1. **All fields with an * are required.** You will not be able to launch the proposal without completing required fields.

2. **SAVE** frequently: click on floating **"Save All Changes"** button

3. **UPLOAD** any supporting documents on the **Files** tab

4. **LAUNCH your proposal:** click on floating **"Validate and Launch"** button

5. **FINAL STEP:** you must "**Make Your Decision**" to move your proposal forward.

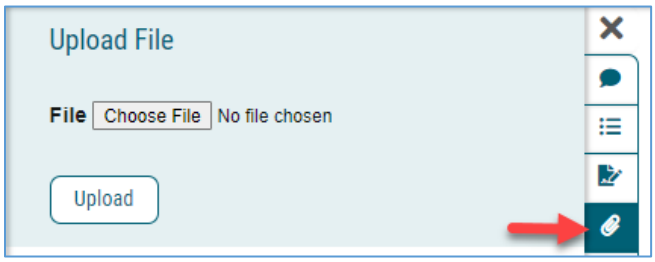
- **Double-check your data before making your decision**. You will NOT be able to make any changes after you make your Decision.
- **Upload any files before making your decision**. You will NOT be able to upload files after you make your Decision.

****

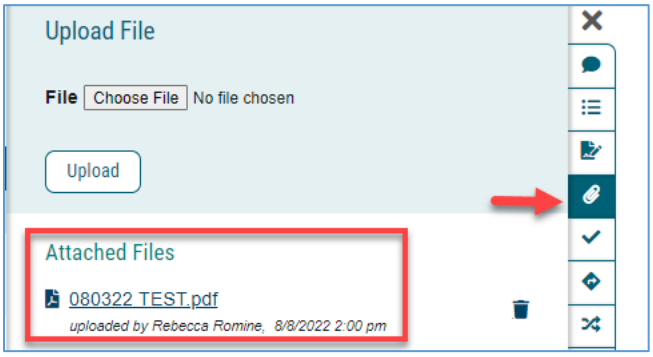
*__If you need help__ filling out the form, please email curriculog@csusm.edu OR contact Criselda Yee or Rebecca Romine via **Teams**

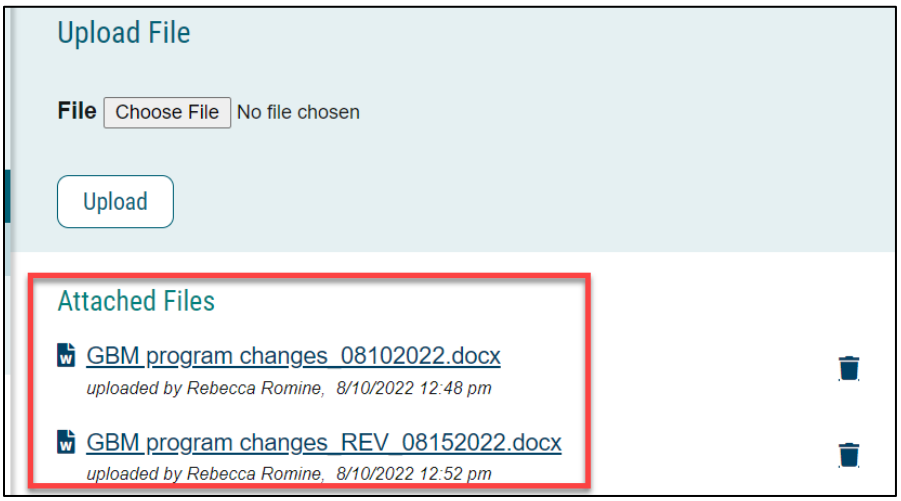
Step 8: Please be sure that you have completed every section required for your submission. Once required fields are completed, click the floating **Validate and Launch** Validate and Launch Proposal button in order to enter proposed changes to the current course data.

Then click the **Files** icon to attach any necessary files. .



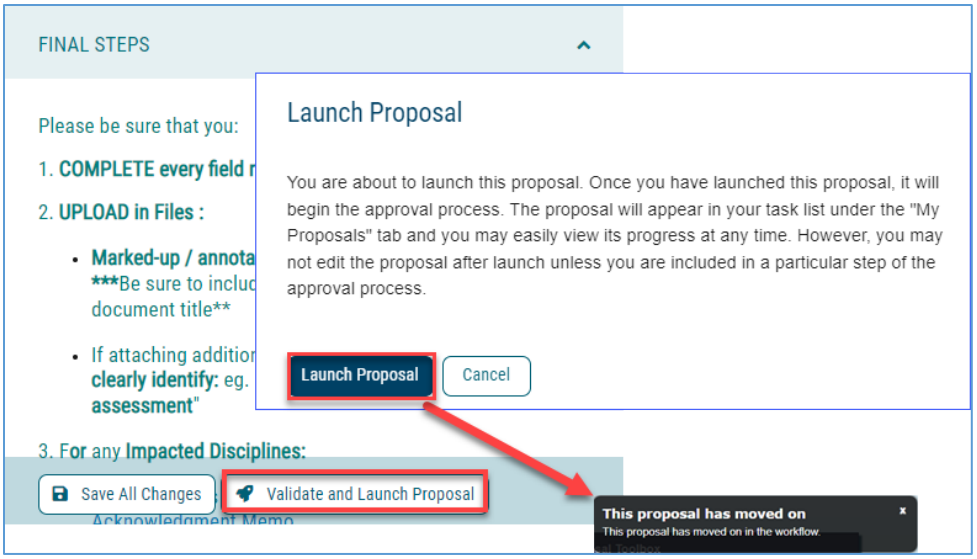
Select the Choose File button, then locate desired file on your computer and click Upload.





****NOTE:** **If you are requested by committee to revise an attachment, syllabus, etc., rename the document with the revised date e.g. "Syllabus_REV_3-26-19" and upload the new document in the Files section.**

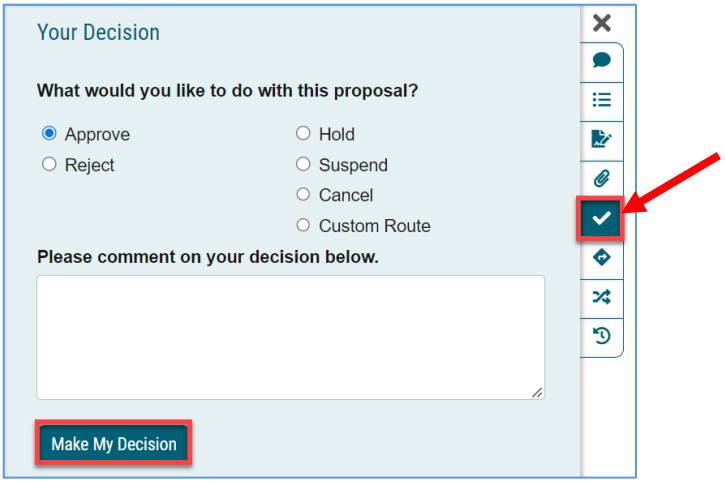
Step 9: Select the **Validate and Launch** button to submit your proposal.



Step 10: Once you have launched your proposal, you will need to complete the final step. **Make a decision in order to advance the proposal to the next step in the process. At this point you can STILL MAKE CHANGES BEFORE you make a Decision.**

To Make a Decision, select the Decisions tab from the Proposal Toolbox.

If you select Approve and then Make My Decision, the Proposal will advance to the next step, e.g. Department Chair. Entering a comment is optional when selecting Approve, however, all other decision types will require a comment.



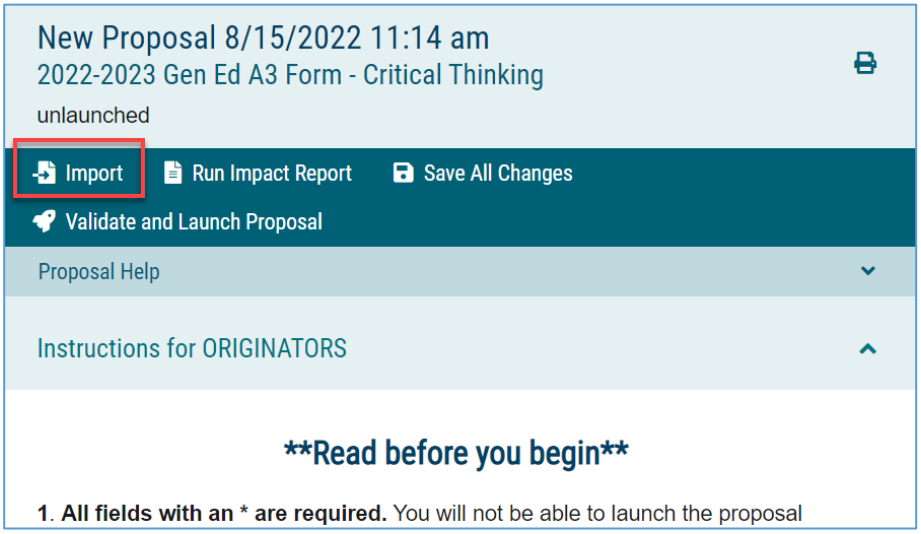
How to Import Course Data for an Existing Course

FOR GE, D&E, AND D (DELETION) FORMS:

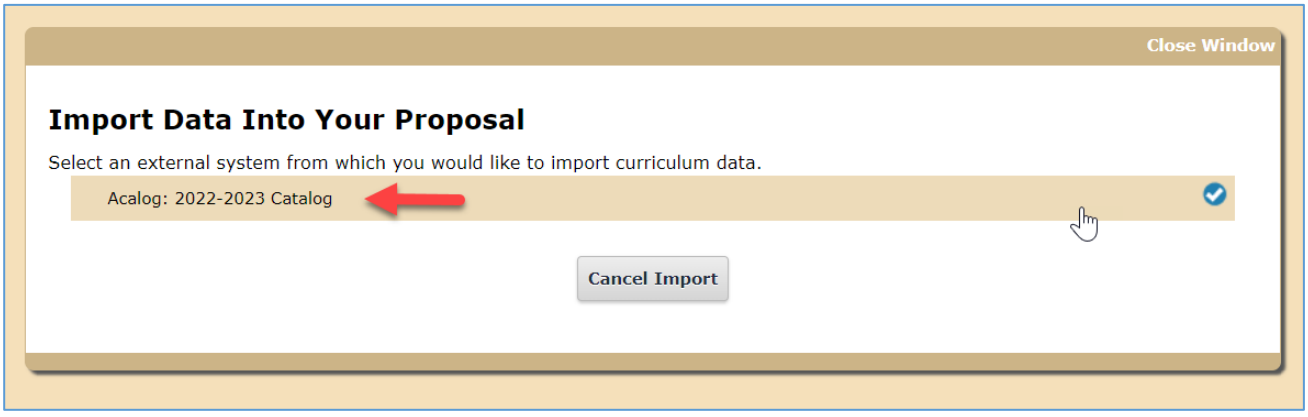
(The GE Area A3 form is used in the example below)

After you select the appropriate form follow these steps:

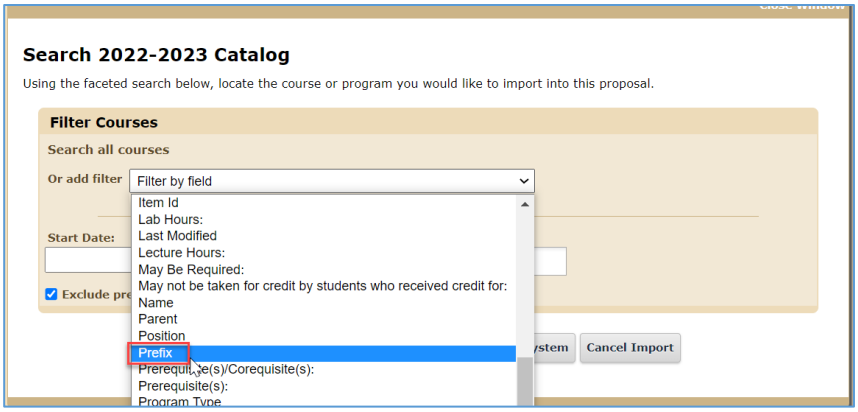
1. Click the Import button 



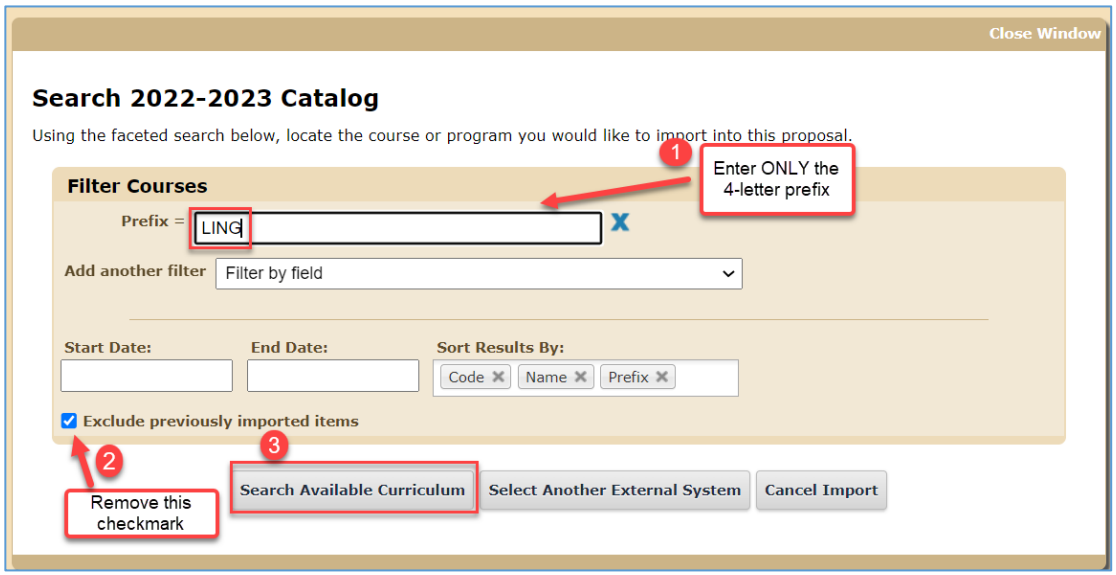
2. The following pop-up window will appear. Select the most recent catalog.



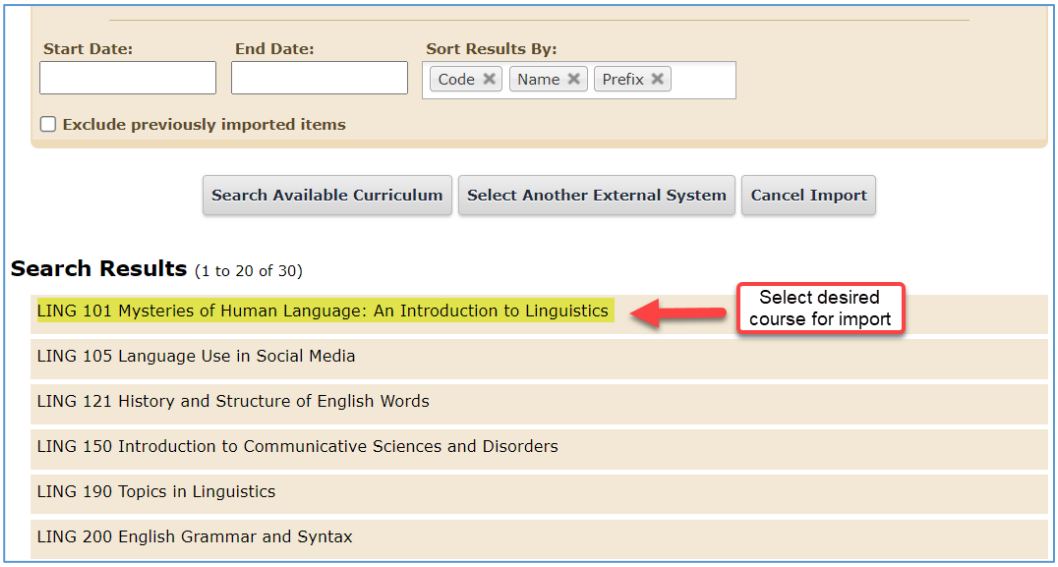
3. From the “Filter by field” dropdown, select “Prefix”



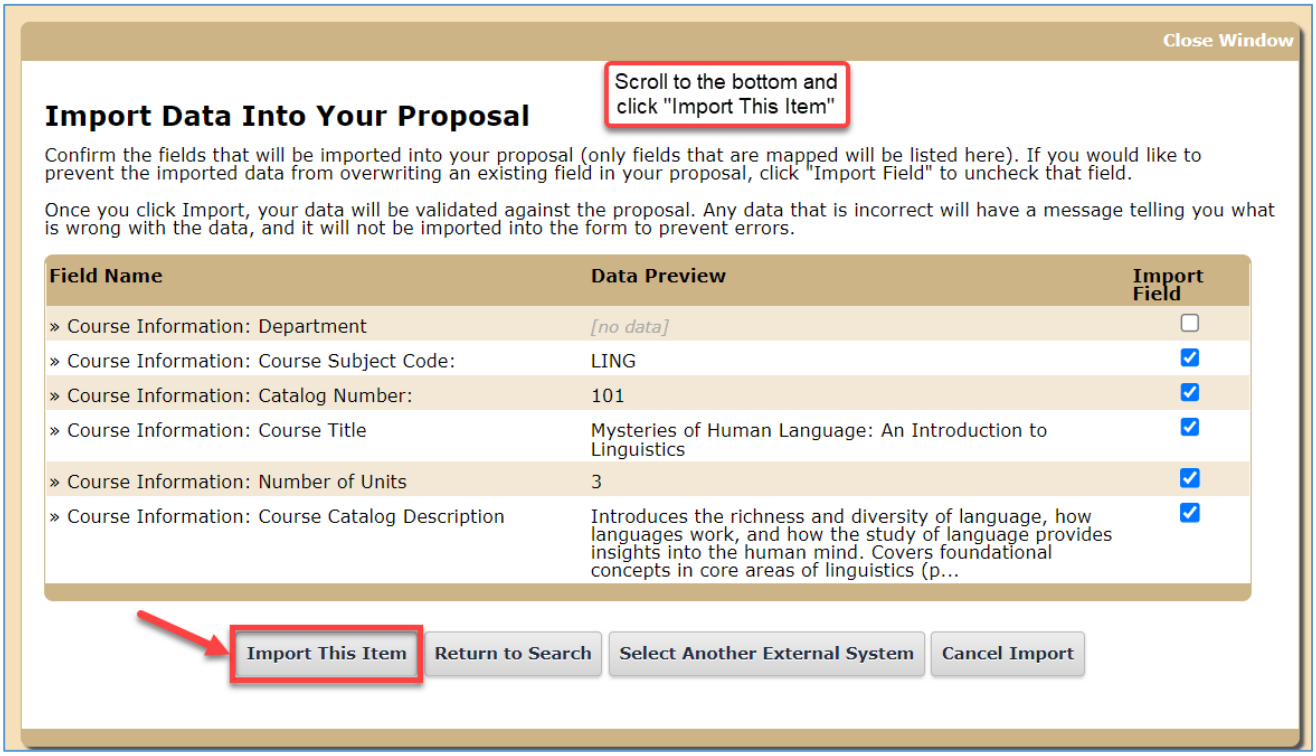
4. Enter the 4-letter prefix, remove the checkmark from “Exclude previously imported items” and click “Search Available Curriculum.”



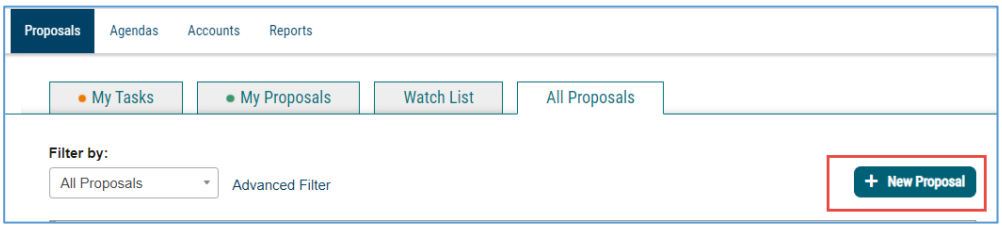
5. Click desired course from the search results for import.



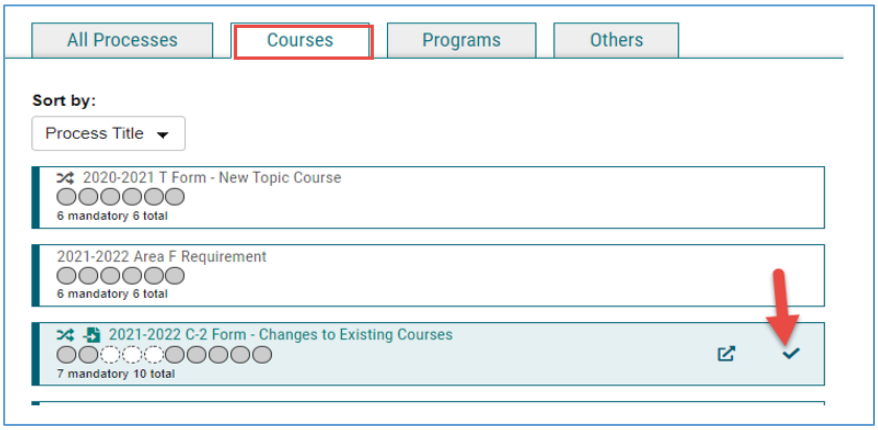
6. Ignore the rows of text, and just scroll to the bottom of the page. Click “Import This Item.”



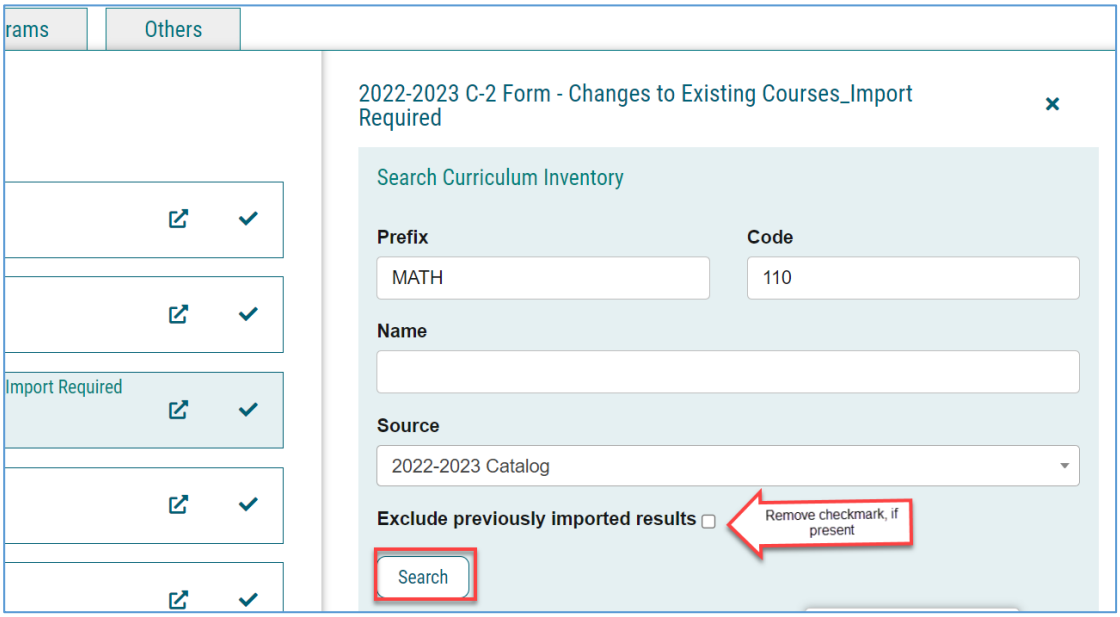
Completing Your Course Change (C-2) Proposal



1. Click the New Proposal button to begin.



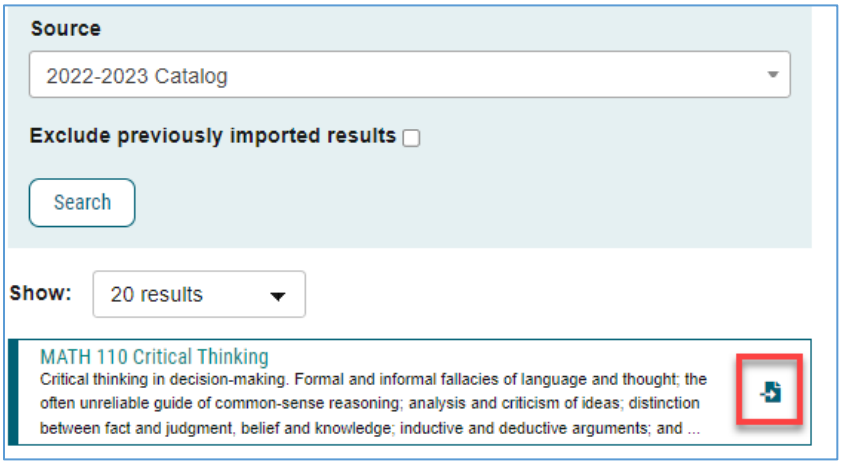
2. Click the checkmark next to the C-2 form



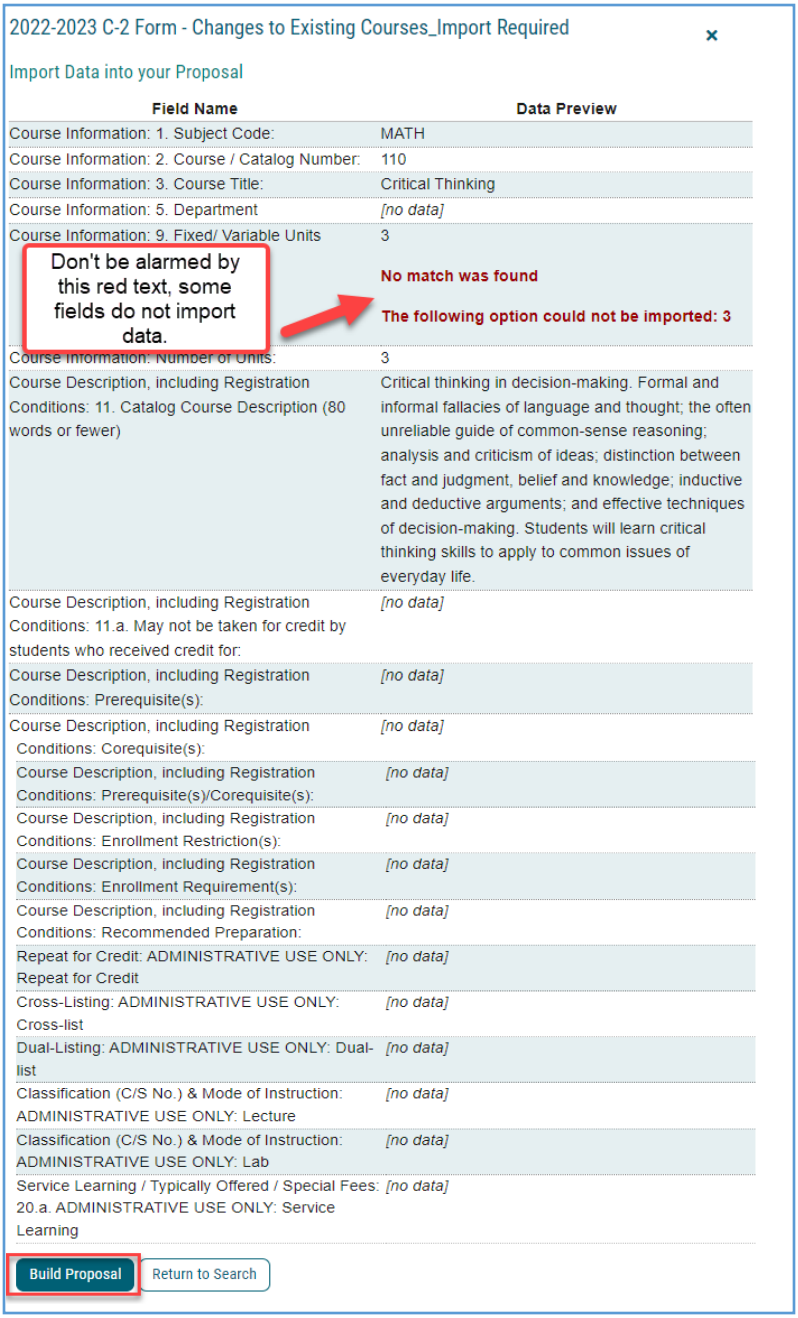
3. You will see a flyout panel on the right. Fill in the subject code (prefix) and number (code) ONLY.

4. Remove the checkmark from "Exclude previously imported results" (if present).

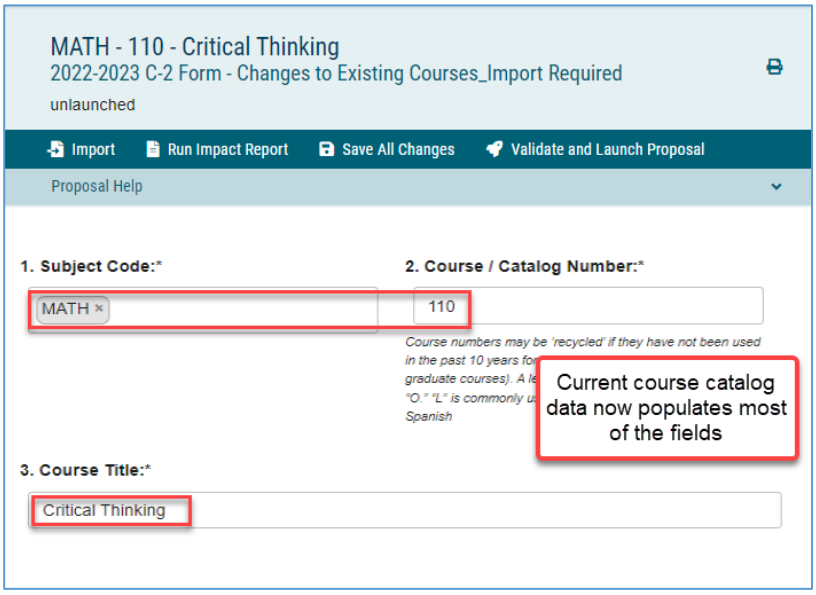
5. Click Search.



6. Click the import button next to your desired course to "preview and build."



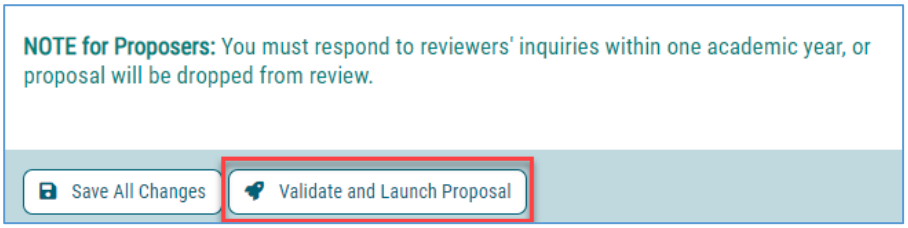
7. The following import data window will appear. Simply scroll to the bottom and click "Build Proposal."



8. Your proposal is now created!

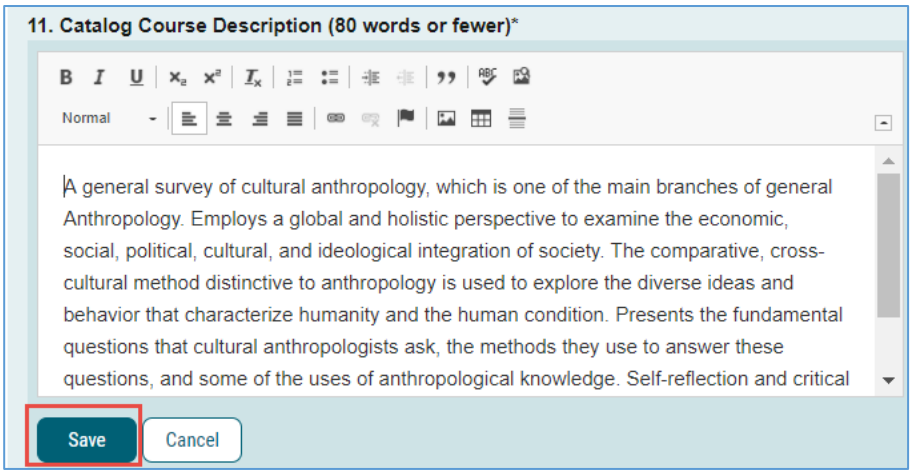
9. **Do NOT enter updated course information or changes yet.**

10. Scroll through form and complete ALL the blank ***asterisked** (REQUIRED) fields.



10. Click "Save All Changes."

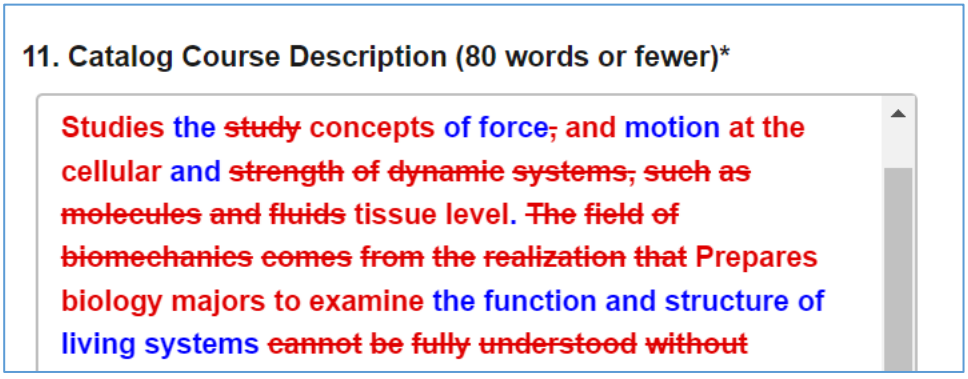
11. And then, "**Validate and Launch Proposal**"

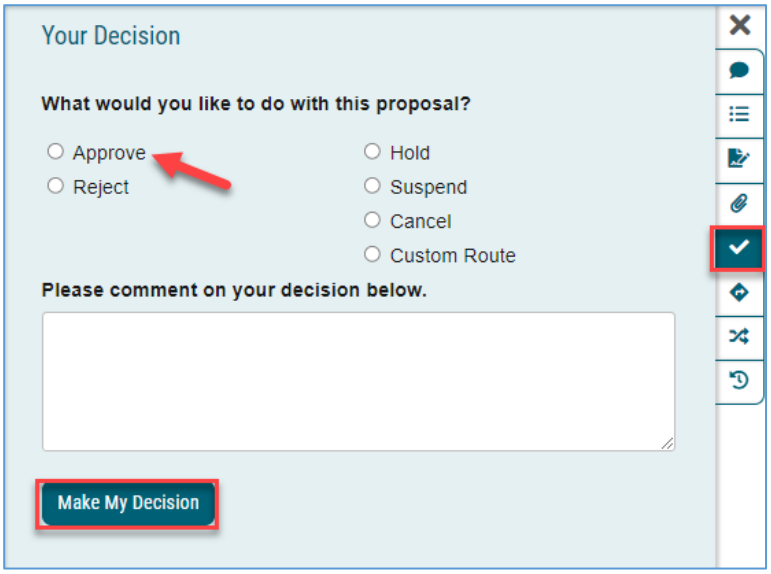


12. Now go back and enter your course/catalog changes in the appropriate fields. Your changes will later appear as "tracked" changes after the next couple steps.

13. Click SAVE.

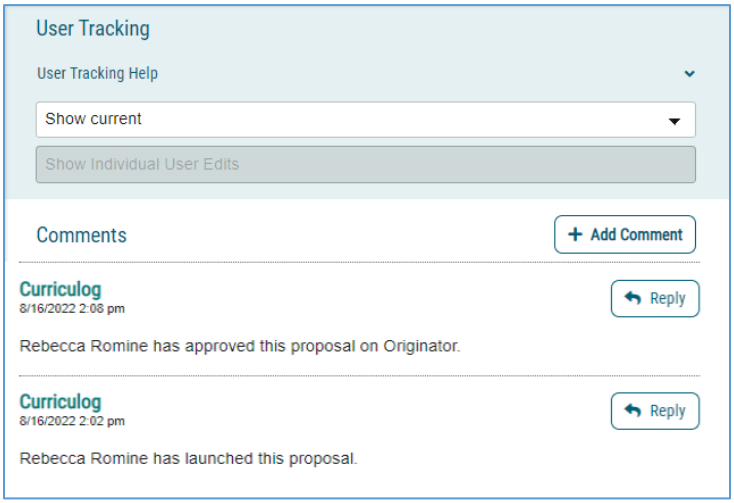
When you make changes AFTER you launch, it will appear similar to Track Changes in Word.



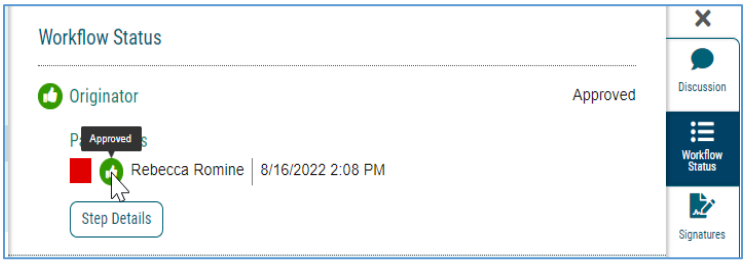


14. In the Proposal Toolbox, click the Decisions icon.

15. Select “Approve”, then click “Make My Decision”



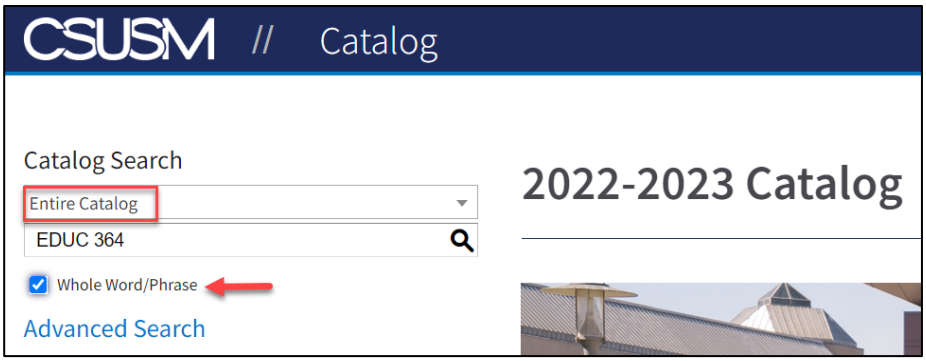
16. Your proposal will now move on to the next step in the Approval Process.



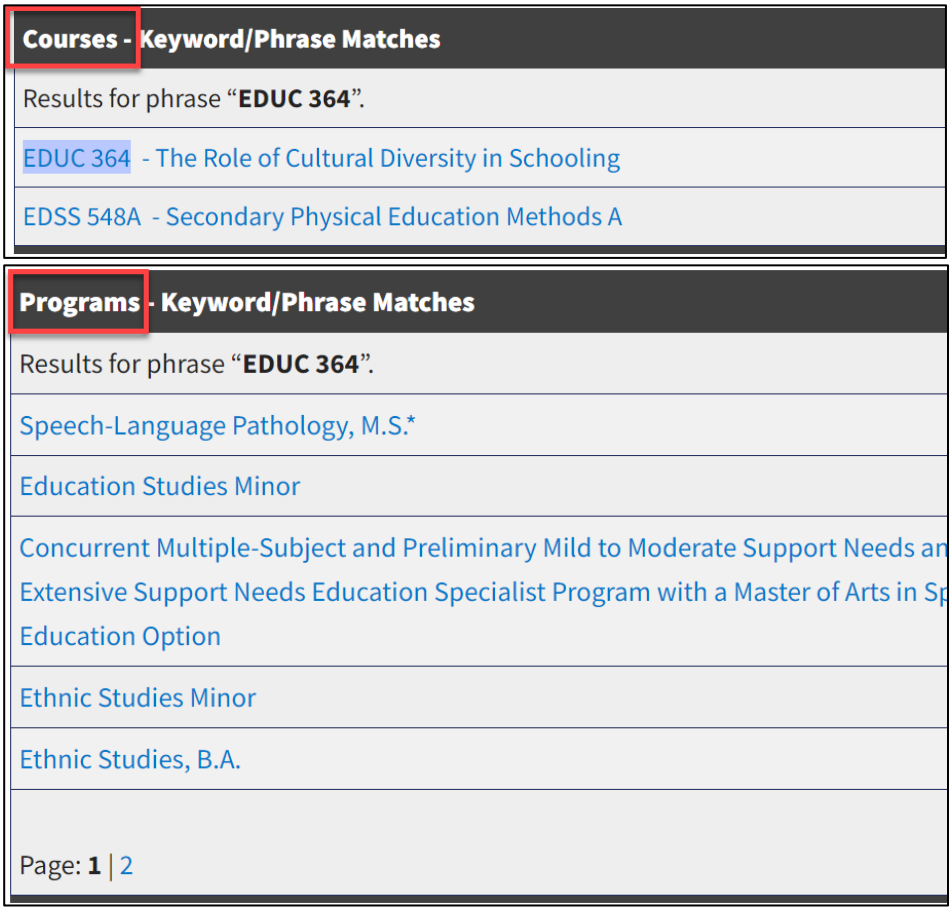
How Run an Impact Report

To report which courses are affected in regard to Prerequisites or Programs, use the Search function of the catalog:

1. Go to http://catalog.csusm.edu/
2. In the Search function – top LEFT corner of the Catalog page - type in the course subject and # and **BE SURE** to click on "**Whole Word/Phrase**" and search "**Entire Catalog**"



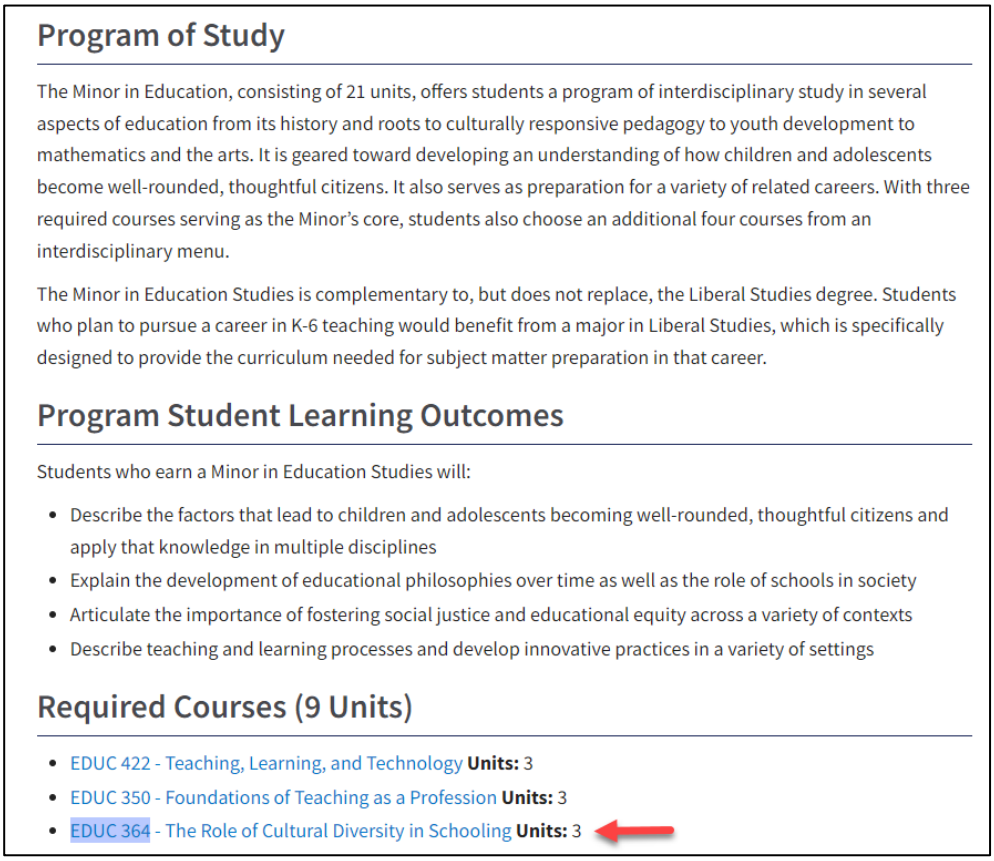
This search result indicates that there are Courses and Programs that include EDUC 364:



Courses - Keyword/Phrase Matches
Results for phrase "**EDUC 364**".
EDUC 364 - The Role of Cultural Diversity in Schooling
EDSS 548A - Secondary Physical Education Methods A

Programs - Keyword/Phrase Matches
Results for phrase "**EDUC 364**".
Speech-Language Pathology, M.S.*
Education Studies Minor
Concurrent Multiple-Subject and Preliminary Mild to Moderate Support Needs an Extensive Support Needs Education Specialist Program with a Master of Arts in Sp Education Option
Ethnic Studies Minor
Ethnic Studies, B.A.
Page: **1** | 2

When you click on one of the programs in the Search Results, you will see the course highlighted:



Program of Study

The Minor in Education, consisting of 21 units, offers students a program of interdisciplinary study in several aspects of education from its history and roots to culturally responsive pedagogy to youth development to mathematics and the arts. It is geared toward developing an understanding of how children and adolescents become well-rounded, thoughtful citizens. It also serves as preparation for a variety of related careers. With three required courses serving as the Minor's core, students also choose an additional four courses from an interdisciplinary menu.

The Minor in Education Studies is complementary to, but does not replace, the Liberal Studies degree. Students who plan to pursue a career in K-6 teaching would benefit from a major in Liberal Studies, which is specifically designed to provide the curriculum needed for subject matter preparation in that career.

Program Student Learning Outcomes

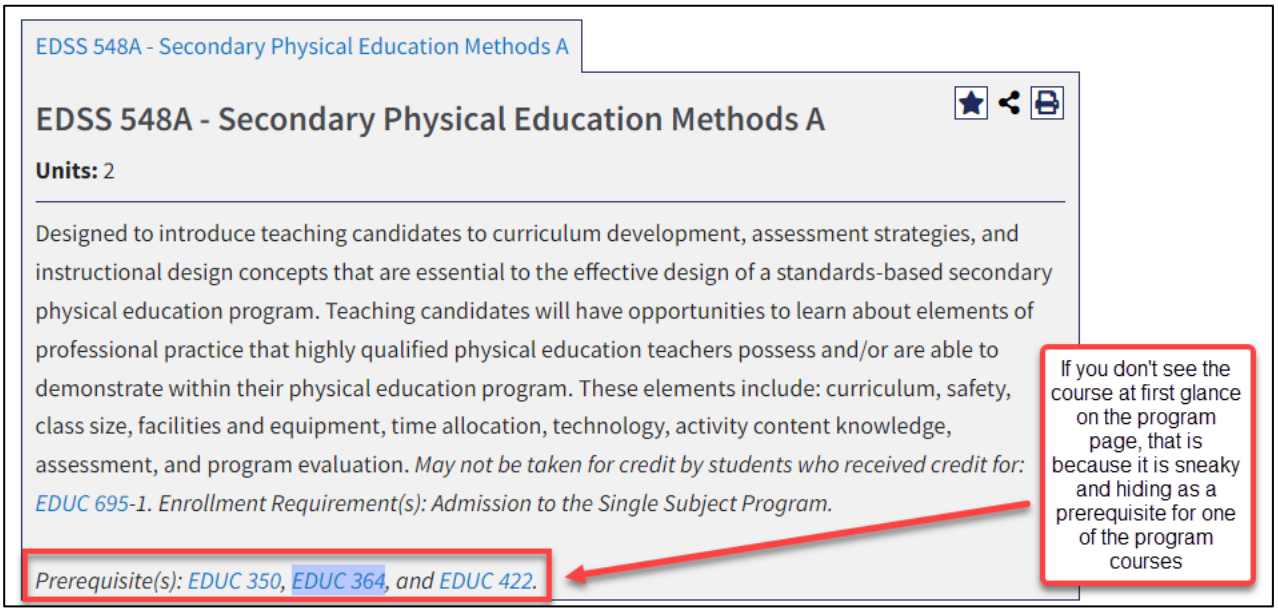
Students who earn a Minor in Education Studies will:

- Describe the factors that lead to children and adolescents becoming well-rounded, thoughtful citizens and apply that knowledge in multiple disciplines
- Explain the development of educational philosophies over time as well as the role of schools in society
- Articulate the importance of fostering social justice and educational equity across a variety of contexts
- Describe teaching and learning processes and develop innovative practices in a variety of settings

Required Courses (9 Units)

- EDUC 422 - Teaching, Learning, and Technology **Units:** 3
- EDUC 350 - Foundations of Teaching as a Profession **Units:** 3
- EDUC 364 - The Role of Cultural Diversity in Schooling **Units:** 3

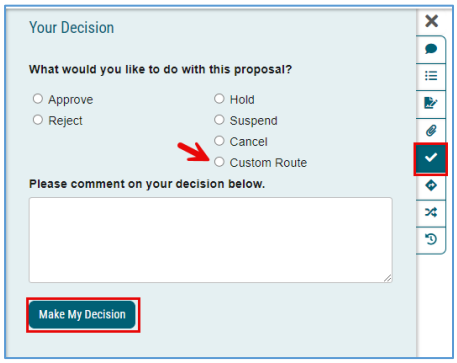
OR, if you don't see the course highlighted:

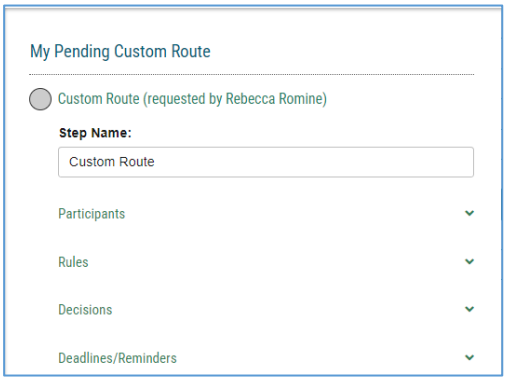


How to Create a Custom Route for a proposal

Creating a Custom Route allows you to send your proposal to other individuals for review, comment, or editing before moving it along in the approval process.

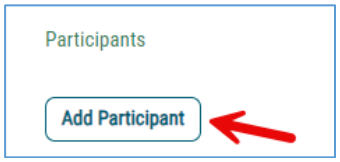
To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab within your launched proposal, and then select Make My Decision.



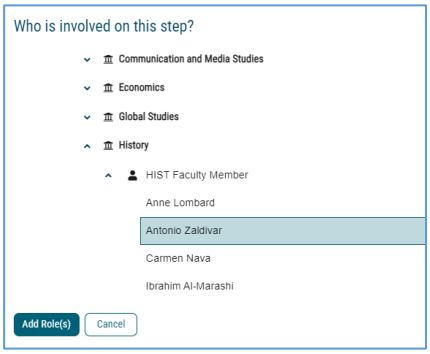


The custom route workflow will open allowing you to choose the participant(s) you would like to custom route the proposal to.

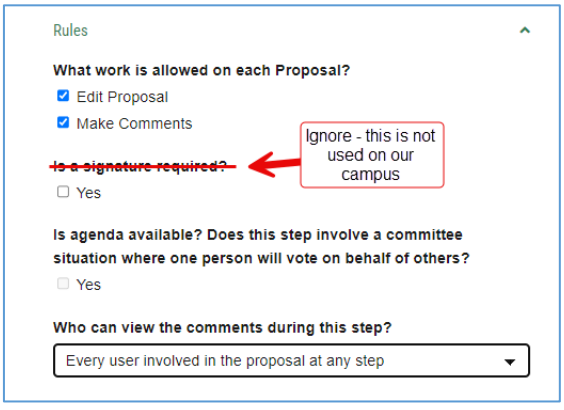
Select the blue arrow to the left of Participants and the option will expand. Select “Add Participant”.



You may utilize the + symbol to expand the hierarchy items to view roles within the campus and utilize the + symbol to expand the users below each role. Click on the user to select them and their row will be highlighted blue. Next select “Add Role(s”). You may select multiple roles or individuals within this workflow. Note that when creating a Custom Route, you must select the Hierarchy option, and choose a participant from an existing role.

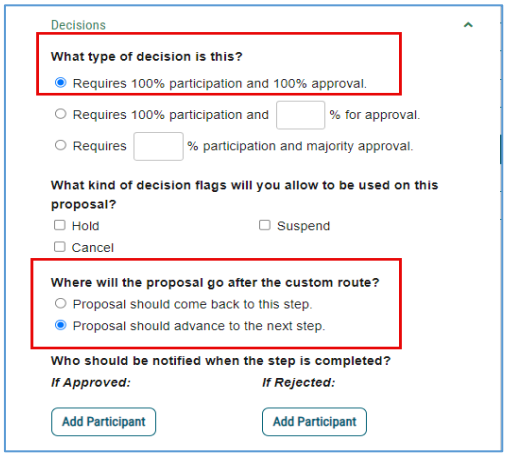


Rules include four options.
Within rules, you may determine whether the users involved in this custom route step will have the ability to edit the proposal and/or make comments. You may also determine whether this step requires a signature from the user. The last option is a drop-down menu allowing you to determine who may view comments made during this step. You 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. Once your Custom Route is requested, a system administrator will receive a notification to approve your request so the proposal can move to your custom step.

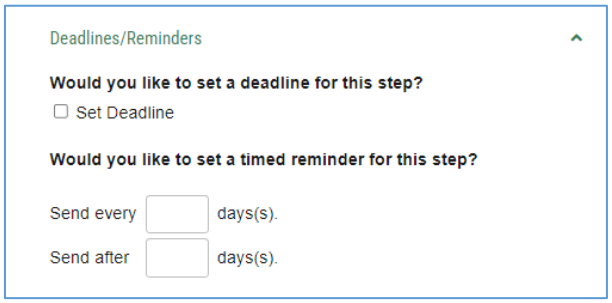


Decisions allow you to decide what type of action participants can take on your proposal.
If you select a 100% Approve/Reject approval, this means your proposal will **not** move forward until all participants have made a decision. You will also need to decide where you want your proposal to go, after it leaves the custom step you are creating. Note: if you select Proposal should advance to the next step you will need to make your decision to approve the proposal immediately after requesting your custom route.

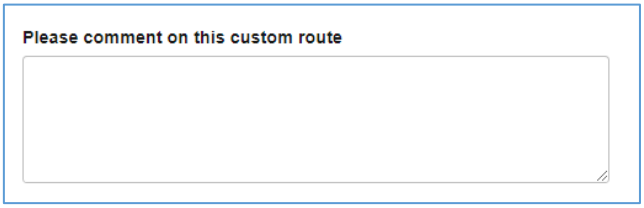
(See the following section How do I make a decision on a proposal? for explanation of decision flags.)



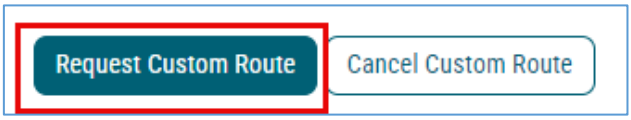
Setting Deadlines/Reminders allows you to make sure your proposal does not get 'stuck' on a custom step with multiple participants that need to review. You can decide to have the deadline move along through the approve process after a set number of days.



Last you will enter comments for your custom route participants and select the "Request Custom Route" button.



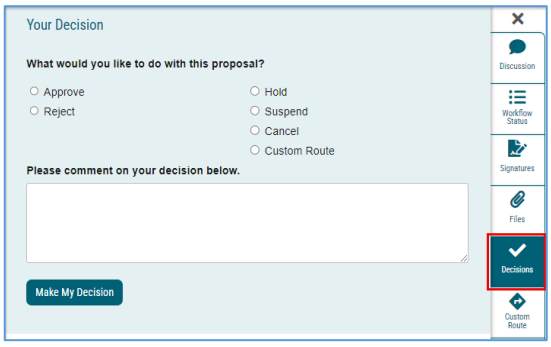
Your route request will be approved by the system administrator.



How do I make a decision on a proposal?

Once you have launched your proposal, completed your modifications and/or set up a custom route that will not return to you after it is approved, you will need to enter a decision in order to advance the proposal to the next step in the process. To make a decision, select the Decisions tab from the Proposal Toolbox.

If you select Approve then Make My Decision, the Proposal will advance to the next step. Entering a comment is optional when selecting Approve, however, all other options will require a comment be entered. (Note: comments are required for every option when requesting a custom route).



Additional options may include Hold, Suspend, Cancel, and Custom Route. If you select one of these options, a request will be sent to the Administrator to approve your request.

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

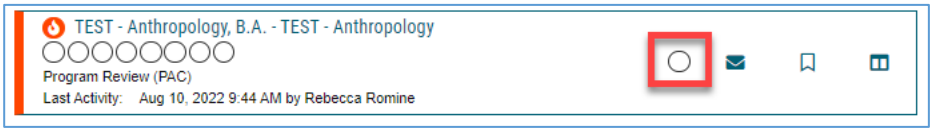
Cancel: Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. If the Administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then relaunch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.

Suspend: Submits a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed. The request should be sent to curriculog@csusm.edu by the Dean's Office to have a suspension removed.

Custom Route: A custom route is an additional ad hoc step outside the steps in the approval process.

How Do I Edit a Proposal?

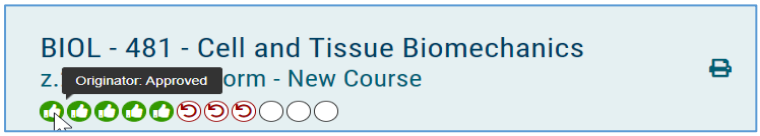
Proposals awaiting a decision from you will be listed in the My Tasks tab of the Proposals Module.



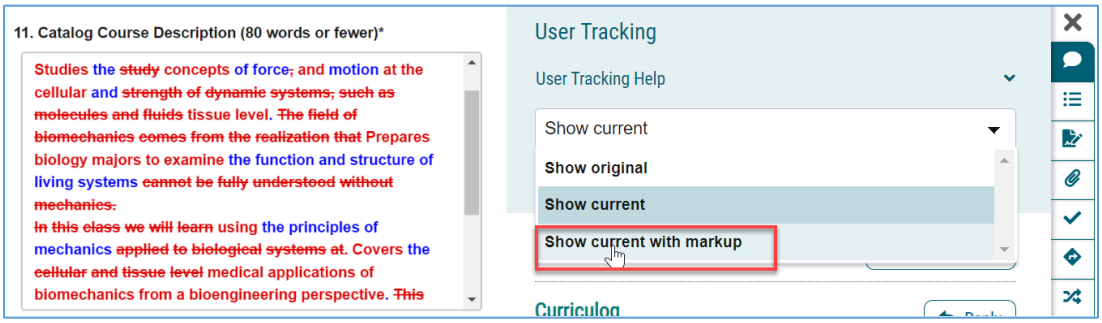
This tab will display by default when logging into Curriculog. When you hover over a Proposal, several icons will appear giving you options for interacting with the Proposal.

To make a decision, click on the desire proposal . The proposal form will display allowing you to see the full proposal and **Proposal Toolbox.** The **Discussion tab** provides a view of the **User Tracking and Comments**.

You may view the status of each step within the proposal by hovering over the Status icons in the upper left of the Proposal, under the proposal title. 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 entered by other users, change the User Tracking drop down menu from 'Show Current' to **'Show current with Markup'**. This will display the changes that have occurred, and when hovering over the changes you will be able to see a time and date stamp, as well as the user's name.



Glossary of Curriculog Terms

The following terms are used throughout Curriculog.

Administrators: Users with permissions to manage Curriculog at the system level. Administrators may participate in the Approval Process along with standard users.

Agenda Administrators: Users who are responsible for creating agendas and approving proposals on behalf of a committee.

Agendas: Functionality to create a meeting agenda for discussing proposals that require an agenda as a part of the approval process.

Approval Process Form: A collection of fields used to gather proposal data from the end user.

Approval Process Toolbox: Provides functionality to add/manage steps, proposal title format, crosslistings and import mapping during the creation/editing of an approval process template.

Code (in reference to course import filter): Course Number

Cores: A combination of descriptive text and/or list of courses that may be created within programs.

Crosslisting: A relationship between course proposals in which the courses must maintain data between them.

Custom Route: An additional "ad hoc" step outside the steps in the approval process. Custom routes require Administrator approval.

Dashboard:

- **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.

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.)

Guest Users: 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.

Launch: Launch indicates when an Approval Process will be made available for end users, or when a proposal will move to the first step in a workflow.

My Settings: Curriculog user settings that an individual may control. (Some of these can be overridden at the Administrator level).

Name (in reference to course/program import filter): Course or program title

New Proposal: Allows users to create a new proposal from a list of administratively managed templates (approval processes).

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.

Proposal: Proposals are the forms that travel up the approval chain.

Proposal Form: Templated form with various fields to collect proposal data.

Reports: Functionality for gathering, analyzing and compiling a variety of curriculum data.

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).

Shared Core: A core created and maintained within one area of the database that may be added to any program in the system.

Steps: Configurable points of approval within a proposal's lifecycle. May involve committees, commenting, voting, signatures, specific deadlines and custom routing.

Urgency: A threshold at which point a new status is automatically assigned to items waiting for a user's decision. They are then moved into a separate tab on their dashboard.

User Tracking: Allows users to see changes that have been made to a proposal.

Users: Individuals granted access to the system for the purpose of directly participating in the curriculum process.