UCF – Curriculog End User Guide

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Welcome from DigArc: Introduction to Curriculog

Curriculog is the culmination of years of research with input directly from our clients on what was needed in a curriculum management solution. It integrates with student information and degree audit systems, streamlines curriculum approval processes, and facilities the integration of courses and programs for catalog publishing.

If you need assistance when using Curriculog, there are two useful links at the bottom of your Curriculog site. Click "Curriculog University" to view our online training resource site. Curriculog University contains an online user manual, frequently asked questions, and video tutorials among other resources. You will automatically be logged into Curriculog University when you click this link. Additionally, click "Contact System Administrator" to reach out to an administrator within UCF and ask any questions that you may have regarding Curriculog.

CONVENTIONS USED IN THIS MANUAL

We have attempted to make this manual as easy to read and navigate as possible. To that end, a few basic conventions will be used throughout.

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, and "administrators" will refer to users who also have System Administrator access, allowing them to manage the setup of the system. This manual will cover only end user access.

ROLES & RESPONSIBILITIES FOR USERS

As users, you will be responsible for creating, editing and making decisions on proposals. Proposals will follow an approval process that has been established by an administrator and will move automatically from step to step. Follow the guidelines below when working in proposals. If you have questions about using the system, those questions should be directed to your System Administrator.

Curriculog may be accessed by visiting **https://ucf.curriculog.com**. Beginning August 27, you will log in using the single sign on feature, allowing you to use your NetID and password. Click on the "Login" on the top right of the screen.

ACCOUNTS MODULE

Users

Click on "My Settings" by first clicking on your name. There are now two tabs on the left. The "Users" tab will display a list of all users within Curriculog. You may sort results by name, role type, or entity using the drop-down menu in the upper-left. You may also use the alphabet links to filter the list of users displayed.

Hovering over a user row will highlight it blue-gray and display an envelope icon to the right of the user's name. The envelope indicates you may send a message to that user. Emails will be sent from your email account and are not kept within Curriculog.
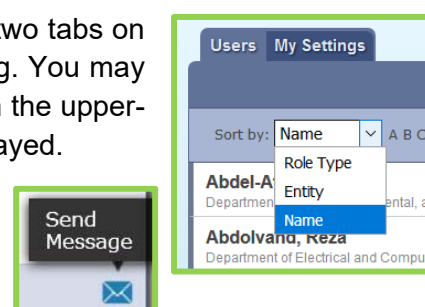
Ten results will display in the pane; selecting "Next 10" or "Previous 10" at the bottom will allow you to scroll through pages of results.

Selecting a user row will display that user's account summary in a fly-out on the right pane. This view displays the user's name, email address, any roles that have been assigned to the user and any committees associated with those roles.

My Settings

From this tab, click anywhere in your user row to view your account summary. Click on your name. The "account summary" appears on the right of the screen. Below, in the "Roles" section, you will see your given roles and/or committees listed. As a user, you will not be able to add or edit your roles and committees. Please email curriculum@ucf.edu if your roles are incorrect.

The next section is "User Rights," which is also controlled by an administrator. The areas that you cannot edit will be gray.

You can choose the frequency of email notifications you receive about proposals. Under "Email Options" you will see five different options, "Weekly Email Digest", "M W F Email Digest", "T TH Email Digest", "Daily Email Digest" and "All Emails." All UCF Curriculog users have the weekly email option selected,

but if you would like to receive your notifications more frequently, you can change that option here. If you make any changes to this area you will need to select "Save Preferences."

You can also view your five-digit PIN if you are an approver and have forgotten the PIN you selected. If you would like to change your PIN, please contact Danielle Hutson at curriculumsupport@ucf.edu or call (407) 823-5221.

Please remember <u>not</u> to click on "Change Password" in your account summary. This would only be needed if you used a separate password for Curriculog. UCF is using the NetID, so you do not need a separate password for the system.

To return to the "My Dashboard" screen after viewing your accounts summary, click on the "Curriculog" logo on the top left of the tool bar.

MY DASHBOARD

"My Dashboard" is the home page for all users of the system. When you log into the system, the first page you will see is "My Dashboard."

Across the top of the page you will find a persistent toolbar; you will have access to the proposals, agendas, accounts, and reports modules.

In the upper-right corner, there are additional options as you hover over your name for "My Settings" (selecting "My Settings" will redirect you to the Accounts Module) and "Logout."

To the right of your name are the help and search icons. Selecting the blue circle with an 'i' (help) will display a pop-up featuring symbols and colors utilized in Curriculog for your reference. *Although the search is available here, the recommended way to locate items in Curriculog will be through the All Proposals tab, using the Advanced Filter options.*
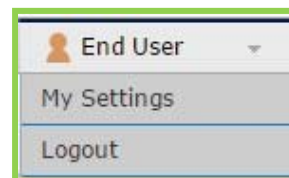
The right pane will display "My Recent Notifications" and "My Upcoming Events," and the option to view the calendar. The left pane will update based on the module and tab selected.

My Recent Notifications

Users will receive notifications for three purposes: system notifications, system-generated workflow notifications (tasks and status updates), and reminders (alerts and deadlines).

The most recent five notifications sent to you will display, and you may utilize the arrow in the upper-right corner to scroll through previous notifications.
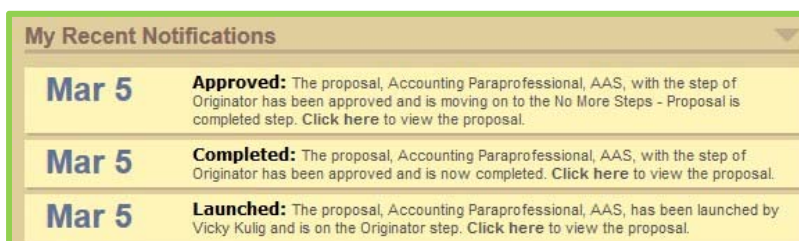
My Upcoming Events

Curriculum-related university-level calendar events, such as proposal deadlines, holidays and committee meetings, will display. Only System Administrators will be able to add items to the calendar.
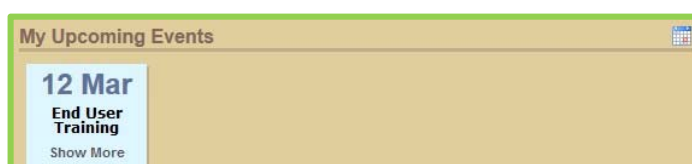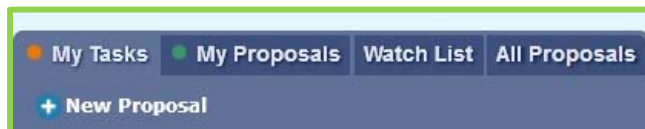
Selecting an event will expand the window and display additional details. Clicking again will collapse to the previous view.

Proposals Module

CREATING A PROPOSAL

When you log in, you will be in the Proposals Module by default. You will see a series of tabs as well as a link to create a proposal.

When you create a new proposal, you will need to choose an Approval Process (AP). You can click on an AP title and see a process summary in the fly-out on the right, and you may also preview the Approval Process to see the form associated. Click on the blue checkmark to choose an AP and start your Proposal.
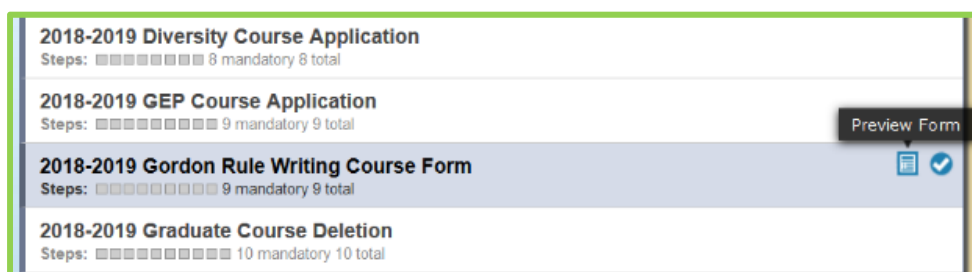
Directions for filling out the form may vary depending upon the type of proposal you are creating.

Please note that all fields with an asterisk are required. You will not be able to launch the proposal without completing required fields.

If you have clicked the help icon ( ) at the top of the page, you may find directions that will guide you in filling out your proposals at the top of the fields.

Please turn on help each time before starting a proposal.

Additionally, to retain work if you need to navigate away, click the "Save All Changes" button either at the bottom of the form or in the upper-left corner.
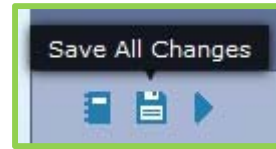
If you navigate away from the proposal before choosing to save your changes, the edits will be lost. You will receive a pop-up warning to save your work.
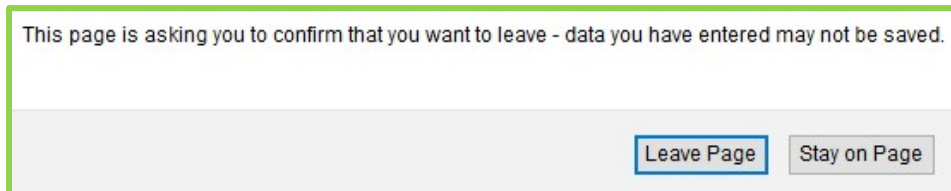
You will know which fields need to be saved because they will be highlighted in blue.
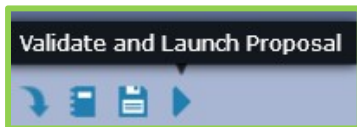
When you have finished your work, press the "Validate and Launch Proposal" icon. This will first validate your fields. If any required field is left blank, or your data does not meet validation, you will see a pop-up window letting you know. Clicking "Show Me" will drop you to the first field that you need to modify, which will now be highlighted in yellow.
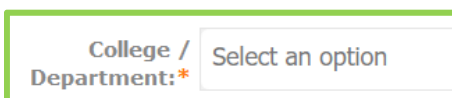
Proposal Fields
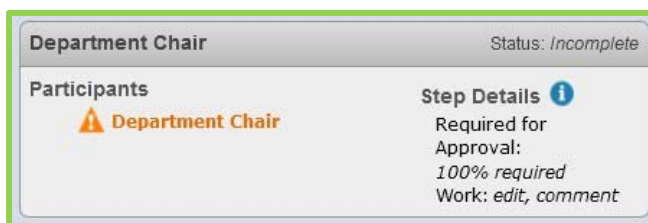
There are several types of fields within a form to fill in before a proposal can be launched. The following types of fields may be found in any proposal.

College / Department

One of the first items will be the "College / Department," which designates the owner of the course/program within Curriculog and is used to assign the correct step participants. By clicking "Select an option" in the field, you will be able to choose an item from the populated list. Additionally, you can start typing to narrow the options in the list.

If you have selected an entity, and there is a step without a user you will be unable to launch the proposal. If a user is missing, you will see an orange icon with an exclamation point as well as orange text indicating the missing participant. You will need to contact curriculum@ucf.edu for assistance.
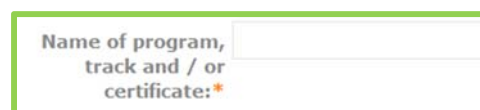
Smartfield

Any time a field displays the "Select an option" text, you will be prompted to select an option from an available list. If you do not see the appropriate option available, you will need to contact curriculum@ucf.edu for additional information.
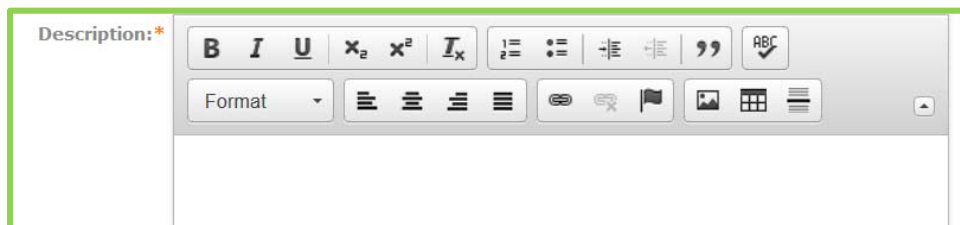
Text Field

"Name of program, track and/or certificate:" is an example of a text field, allowing you to input a small amount of text.

Text Area

Text areas give you a much larger field to work with and may include a WYSIWYG editor. The editor gives you tools to allow additional formatting within the field. Typically, however, you do not need to worry about formatting.

Radio Button

Some fields will present with an either/or option and will require you to select a radio button. There may be multiple options to choose from, but only one may be selected.

Repeat for credit? ○ Yes   ○ No

Note: *If there is only one choice and it was accidently selected, the only way to de-select is to move out of the proposal without saving (potentially losing other data) or starting over.*

Checkbox Set

Fields that present options with checkboxes will allow you to select more than one choice.

When will the course be offered? ☐ Odd Fall ☐ Even Fall ☐ Odd Spring ☐ Even Spring ☐ Odd Summer ☐ Even Summer ☐ Every Semester ☐ Occasional

Type of Program

For the 2018-2019 academic year, UCF has no shared cores in its catalogs. Therefore, please always select "Program" when completing a non-course proposal.

Due to the nature of shared cores, they cannot be modified within program proposals. This option allows you to instruct Curriculog on whether you will be modifying a program or a shared core.

Program Type* ● Program ○ Shared Core

If you need to modify a shared core, you must create a proposal separate from its associated programs. For this reason, there is the "program type" field where you decide what type of proposal you are trying to create. You must select the option first and click "Save All Changes" at the top or bottom of the form before you may import content into your proposal.

Prospective Curriculum

"Curriculum" is specific to program proposals and allows you to build and attach courses. This section has three views available: "Preview Curriculum," "View Curriculum Schema" and "View Curriculum Courses." The default view will be "View Curriculum Courses."

Curriculum* No Courses
▤ ☰ ☰   **Add Course**

View Curriculum Courses
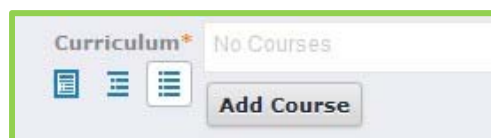
View Curriculum Courses
▤ ☰ ☰   Add Cour
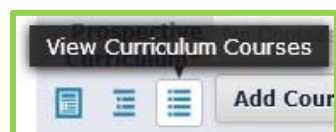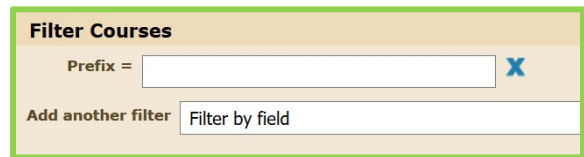
From "View Curriculum Courses," you will have the options of importing courses or manually adding them. If you choose to manually add a course, you will need to provide a Prefix, Code and Name for that course.

Add Course   **Import Course**

Note: *Use "Add Course" to add new courses that are being proposed or have been recently approved but are not in the current catalog. Use "Import Course" for courses currently in the catalog.*

When you choose to import a course, a pop-up window will display listing the available catalog(s) from which to pull courses. To begin, select the catalog.

Next, you will be presented with filter options that may be used to find courses. The search will default to searching through all courses, but you may use the "Or add filter" drop-down menu to select specific filtering options (for example, searching for courses by prefix).

Filter Courses

Prefix = [   ] **X**

Add another filter | Filter by field

Search Results (1 to 20 of 2750)

ACG 6065 Accounting Foundations

ACG 6185 Financial Statement Analysis

ACG 6255 International and Multinational Accounting

ACG 6305 Advanced Managerial Accounting

ACG 6415 Advanced Accounting Information Systems

When reviewing the search results, you may click on them to add them to the proposal. Selected courses will be indicated in a darker gold color.

You may navigate through pages (if applicable) with the "previous" and "next" buttons to locate more courses. Your previously chosen courses will remain selected as you view other pages of results. When finished, click "Add Courses to Proposal."

Once courses are added, they will be listed in the "View Curriculum Courses" section and may be added within cores. Hovering over a course will display a blue "X" to the right, allowing you the option to remove a course. You will not be able to remove a course from this section if it is being used within a core under "View Curriculum Schema."

Prospective Curriculum*

ACG - 6185 - Financial Statement Analysis

ACG - 6255 - International and Multinational Accounting   **X**

ACG - 6415 - Advanced Accounting Information Systems

View Curriculum Schema

To modify the requirements and structure of the program, 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. [Remember, shared cores are not available during the 2018-2019 academic year.]
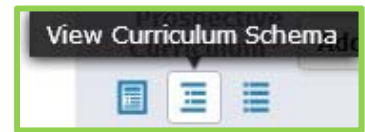
When you choose to "Import Core," a pop-up window of available catalogs to pull from will open. Clicking "Search Available Curriculum" will pull up every shared core available in the selected catalog.

Once added to the list of available cores, you will see a padlock symbol because a shared core cannot be modified within a program. You may expand it for review by clicking on its gray box.

When you select to "Add Core," a new core will be created. To modify the core, select the gray box for the core name, and it will expand displaying a title, description and courses field.

When you select "Add Courses," a dialog box will display, and you may choose from the list of courses that were added under the curriculum courses view. Courses must first be attached under "View Curriculum Courses" to be available under "View Curriculum Schema."

When you select a course, it will be highlighted blue. Once you've selected all courses that you would like to attach to the core, select "Add Course."

Selecting "Add Custom Text" will display a dialogue box where you may enter text. Custom text can be displayed over, under and between courses. Once custom text has been added, it can be modified or deleted. You are also able to drag and drop the Custom Text to the desired location between your courses. Use "Add Custom Text" to add in "and," "or" or any other descriptions related to the courses listed such as "select two of four."

Courses

ENG - 6074 - Historical Movements in Literary, Cultural, and Textual Studies

LIT - 6216 - Issues in Literary Study

(can be taken four times for credit when course content is different)

Note: *You must add a course to the core before you can add Custom Text. The Custom Text will be attached to the course above it and the placement will default to 'after.'*

After you've finished making changes to a core, you may collapse it by selecting

New Core

the gray bar displaying the core title. When you hover over a core, two icons will appear to the left of the core title: a gray up-and-down arrow which allows you to move the core and the blue "X" icon which will allow you to delete the core. Each new core will appear at the bottom of the list.

If you would like to create a sub-core (to have a core appear indented after another), hover over the gray arrows icon, click and drag the core to the right to fall below the desired core. You may also change the level of cores by pulling them to the left.

New Core

New Sub-Core

Proposal Icons

Import
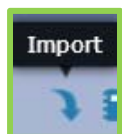
Import

When you are creating a proposal for a course/program that already exists, you will begin by importing the existing catalog information. Remember to launch your proposal after importing <u>before</u> you begin to make the proposed revisions. This will allow your changes to be tracked.

Save All Changes

A "Save All Changes" button is always viewable at the bottom of the form and moves as you scroll down. There is also a save icon at the top-left of the form.

Save All Changes

You will see a warning if you attempt to navigate away from the form while there are unsaved changes. A blue background will be added to fields that need to be saved.

Validate and Launch Proposal

Once you have filled in the form, launch the proposal so that it will move onto the next step in the process. **If you are making a revision to an item, <u>do not</u> make proposed changes before launching.** If you are creating a new item, unless you are a part of a later step in the process, no further action will be required.
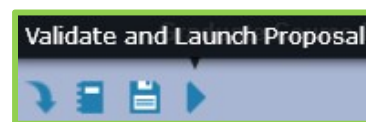
When launching the proposal, the system will also check for validation errors, empty required fields or missing participants. If so, you will see a dialog box with an option to "Show Me." This will highlight the fields yellow for your convenience.

Run Impact Report
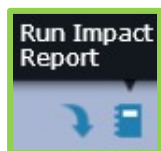
Exclusive to course proposals, this provides all dependent elements of the course, such as prerequisites, crosslistings, programs, etc. From the pop-up window, select at least one catalog and your results will generate in this same window. Simply copy and paste the results into the course proposal form.

Show Help Text
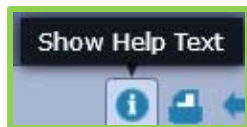
To view the help text (instructions from an Administrator for the fields), select the "Show Help Text" icon to display all help text on the page. You can turn on the help text at any time.

Print

You will likely never need to print a proposal, because it will always be available in Curriculog.

If you want to print your proposal, select the "print" icon from the upper-right corner of the form. If you would like to include more details, you can select "Print Options" from the pop-up window and use the checkboxes to select the information you would like to include in your printed version.

Toggle Full-width Form

You may also choose to expand the form into a full screen view, by selecting the "Toggle Full-width Form" icon. Click it again to collapse back to the original view where the Proposal Toolbox is available.
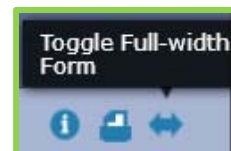
Proposal Toolbox Icons

Discussion
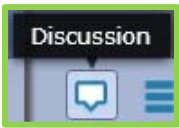
This tab provides the ability to track changes. There are three options: "Show current," which shows the proposal as it is currently; "Show original" to see the proposal as it was before changes; and then "Show current with markup" to see the user tracking.

To see the user tracking of specific users, click the second drop-down menu, "Showing All Edits by All Users." First, it will display all users that have made a change, but you can select/deselect them one by one.

When you hover over a color, it indicates the user who made the change as well as the date and time. As other users change the item in future steps, they will be assigned a different edit color as needed.
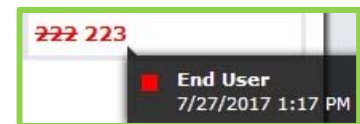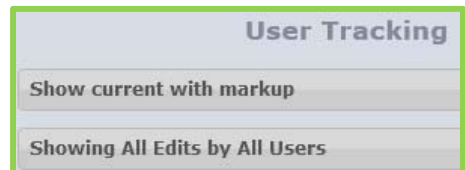
Status
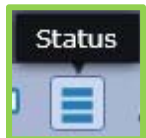
This tab lists the steps of the proposal and indicates the status for each. If you see a color square next to a participant, you know the color of their edits.

Under "Activity" on a step, we can see the % needed for approval, how much time has been spent on the proposal so far and whether the participant has made changes or comments. You can click the help icon (blue circle with 'i') next to "Activity" to see the full step settings.
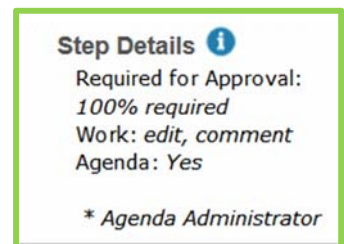
Signatures
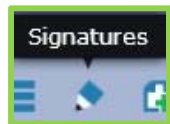
This tab allows for the user to sign the proposal with their

unique pin. If you are the "Originator" for a proposal, you will not be required to use a five-digit PIN to approve and move the proposal to its first review.

Files
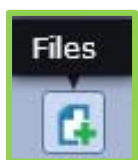
You may upload as many attachments as you need; everyone working on the proposal can see these files.

Note: *Please ensure there is no spacing in your file name, or you may not be able to upload the document.*

*You will be required to upload syllabi for most course proposals.

Decisions
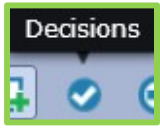
The decisions you have available will depend on the settings your System Administrator has chosen. Any decision other than "Approve" will require a comment explanation.

Additional options <u>may</u> include Reject, Hold, Suspend, Cancel and Custom Route:

- **Reject –** *(if you disagree with the proposal or feel that it needs further work, you will reject)* This will send the proposal back to the previous step. Edits can be made; the previous step can approve again; and the proposal will return to you for another review.
- **Hold –** *(if you need time to work on the proposal but do not want it to move on in the workflow, you will hold)* This submits a request for the proposal to stay in your step of the approval process. The request is sent to the System 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.
  ** Please note that UCF has not set deadlines in Curriculog, so there is no need to hold a proposal unless a committee wants to document that a proposal was "tabled" and will be reviewed at its next meeting.
- **Suspend** – *(if you need time to review the proposal but do not want it to move on the in workflow, you will suspend*) This submits a request for the proposal to be suspended at your level in the approval process. No work may be done on the proposal, but it will not advance in the workflow until the suspension is removed. The request is sent to the administrator who will approve or reject the request. Additionally, the administrator has the ability to remove a suspension placed on a proposal.
- **Cancel** – *(if you would like to remove this proposal from the workflow and delete it, you will cancel)* Known as the "hard no" option, this submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the System Administrator who will approve or reject the request. If the administrator approves the cancel request, the proposal will be sent back to the Originator. The Originator may then either re-launch the proposal *or* decide to cancel as well, 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.
- **Custom Route** – *(if you need the opinion or review of someone who is not a participant on the proposal, select custom route)* A custom route is an additional step outside the steps available in the proposal. Custom routes require administrator approval. If they approve, this will allow you to bring someone else into the proposal that is not included within the current steps.

Custom Route
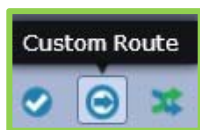
If you make the decision to create a Custom Route, you will be brought to this tab. Under "My Pending Custom Route," you will be able to create your additional step. You may rename the step if you would like in the "Step Name" field.

Custom Route (requested by Diana Prince)	
Step Name:	Custom Route

Participants

Click "Participants" to choose the participant you would like to review the proposal. Select "Add Participant" and choose "Hierarchy." When creating a custom route, you must select the "Hierarchy" option rather than the "Role Types" option.
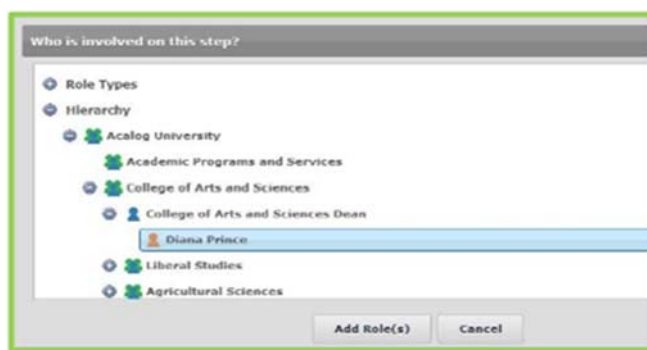
You may utilize the "+" symbol to expand the hierarchy items to view roles. Click on the user(s) to select them, and their row will be highlighted blue. Next, select "Add Role(s)." If you selected someone by mistake and need to remove them, click on their name again to deselect them. You can send a custom route to multiple users.

Rules

You may determine whether the participant(s) involved in this custom route step will have the ability to edit the proposal and/or make comments. You may also decide whether this step requires a signature* from the participant. The last option is a drop-down menu allowing you to determine who may view comments made during this step. Please ensure all levels can see the comments.

Note: *If an Administrator has not assigned the participant(s) a PIN number for the signature, they may not be able to make a decision and move the proposal along. Please only require a signature for committees, Chairs/Directors, or Deans. Please do not require a signature for colleagues working with you on a collaborative proposal.*

Decisions

"Decisions" allows you to provide options on how the participants may advance/send back the proposal.
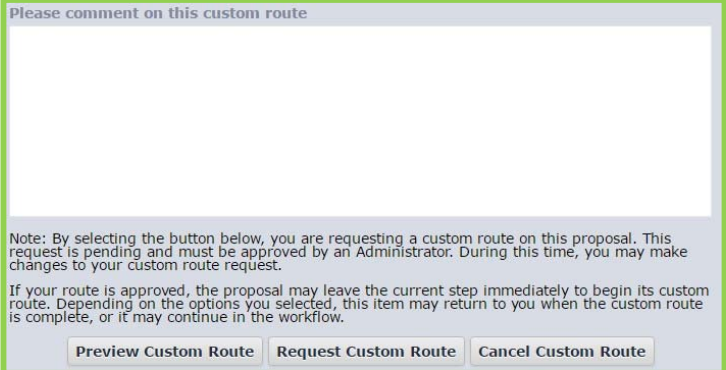
You may also provide the decision options for Hold, Cancel, or Suspend. Rarely would there be a reason for a recipient to need these options, however.

You will also determine where the proposal will be routed after this custom route. Once the individual(s) on the custom route step make(s) a decision, it may return to you or it may advance to the next step above you. You may even select users to be notified when the custom route step is completed based on approval or rejection.

Note: *If you choose for the proposal to advance to the next step after the custom route, you will be required to make an additional decision after the custom route is approved in order to move it onto the custom route step.*

Deadlines/Reminders

Editing the Deadlines/Reminders option allows you to set a number of days to be allowed for this step and determine if reminders are sent to the participant(s) involved on the step. If you enter in a deadline, you may choose to automatically reject or approve the step if the deadline passes without action. You may also add users to be notified if the deadline passes without action.

Please comment on this custom route

Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.

If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.

Preview Custom Route   Request Custom Route   Cancel Custom Route

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

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

Crosslistings

Crosslistings
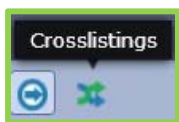
Not used at UCF.

Courses

When you have chosen to create a new course proposal, you will be presented with a form. Again, all fields with an asterisk (*) will be required to launch the Proposal. As the Originator, you will be responsible for filling in the form according to the directions. The directions for each form may vary, so please preview before starting the proposal.

New Courses

When you are filling in a proposal for a new course, you will need to fill in all required fields. If you have missed any required fields, you will not be able to launch the proposal. All required fields that were left blank will now be highlighted in yellow with orange text that reads, "____ is required."

Note: *For a guide to the types of fields you may encounter, please see "Proposal Fields."*

You may also be required or choose to include files with your proposals to be available for another participants' review. To attach a document, select the "Files" icon from the Proposal Toolbox.

Note: *For more information on the icons in the Proposal Toolbox, see "Proposal Toolbox Icons on page 15.*

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

Once the proposal has been launched, it will move onto the next step in the process where you will be able to leave comments.

Note: *For more information on the icons found at the top of the form and/or the dialog boxes that may pop-up, see "Proposal Icons."*

Once you have completed the proposal, navigate to the "Decisions" tab to approve your modifications and advance the proposal to the next step in the workflow. Unless you are a part of a later step in the process, no further action will be required.

Fees Requests

Curriculog includes APs for Materials & Supplies Fees (for courses) and Equipment & Facilities Fees (for programs). They are similar to course proposals, and they include policy information to help determine whether the proposed use of the fee meets the BOG regulations. Please preview the form before starting a proposal. Spreadsheets with detailed budget information must be attached to the proposals.

Common Program Oversight Committee (CPOC) Forms

The Common Program Oversight Committee (CPOC) developed Curriculog forms for (1) GEP course proposals, (2) diversity requirement course proposals, and (3) Gordon Rule Writing course proposals. CPOC will no longer accept hard copy forms.

Course Revisions/Deletions

When you have chosen to create a proposal to revise or delete a course, you will be presented with a form. Again, all fields with an asterisk (*) will be required in order to launch the proposal. As the Originator, you will be responsible for filling in the form according to the directions.

When you are creating a proposal for a course that already exists, whether you intend to revise or remove the course, you will to begin by importing the existing catalog information. Start by selecting the "Import" icon from the upper-left corner of the proposal.

This will open a pop-up window listing all available catalogs from which you can import.

You may use the search filter to locate your desired course. To look for a course based on a specific field, or combination of fields, use the "Filter by field" drop-down menu to select a field like "Prefix" and/or "Code." This will allow you to enter the information about a specific course rather than scanning through pages of results. Once you have entered the information, click "Search Available Curriculum."

Note: *You cannot perform partial searches when filtering. For example, if the prefix of a course is "ACG," searching for "A" will not yield any results. You would need to search for the entire prefix of the course.*

Once your results have been returned, click on the title of the course you wish to import. You will then be able to preview all mapped data available to import. To complete the import, click "Import this Item." The window will close, and your proposal will be populated with the imported data.

Once you import the existing catalog data, do **not** make changes to the existing information. Complete the remaining required fields and launch your proposal by selecting the "Validate and Launch Proposal" icon from the upper-left corner of the proposal. Once the proposal has been launched, you will be able to track your proposed changes.

As changes are being made, the system will now track all modifications. To review your modifications or the edits/comments made during previous steps, navigate to the "Discussion" tab. To review all steps on this proposal and their details, select the "Status" tab.

You must attach a syllabus for a course revision. You may also choose to include files with your proposals to be available for another participants' review. To attach a document, select the "Files" icon from the Proposal Toolbox.

Once you are finished working in the proposal, navigate to the "Decisions" tab to approve your modifications on to the next step in the workflow.

Programs

When you have chosen to create a new program proposal, you will be presented with a form. Again, all fields with an asterisk (*) will be required in order to launch the proposal. As the Originator, you will be responsible for filling in the form according to the directions.

New Programs

When you are filling in a proposal for a new program or shared core, you will need to fill in all required fields. If you have missed any required fields, the proposal will be unable to launch. All required fields that were left blank will now be indicated in yellow with orange text that reads, "___ is required."

At the very top, you will need to indicate whether this is a program or a shared core. Additionally, you will be able to build the requirements/structure of the program within the "Prospective Curriculum" field.

If it is necessary to import an existing program as the base for your new program, clicking the "Import" icon from the upper-left corner of the proposal will open a pop-up window listing all available catalogs from which you can import. The available catalogs are determined by your System Administrator.

You may use the search filter to locate your desired program. To look for a program based on a specific field, or combination of fields, use the "Filter by field" drop-down menu to select a field like "Name." This will allow you to find a specific program rather than scanning through pages of results. Once you have entered the information, click "Search Available Curriculum."

Note: *If you search for "Art," you will receive any program that has the exact word "art" in the name (ie: "Art History Minor"). You may also search with a wildcard (an asterisk) to pull more results. For example, "Art*" will pull any program that has any word with "art" found within them (ie: "Audio Arts Production Minor" because of the 's').*

Once your results have been returned, click on the title of the program you wish to import. You will then be able to preview all mapped data available to import. To complete the import, click "Import this Item." The window will close, and your proposal will be populated with the imported data.

Once you import the existing catalog data, do **not** make changes to the existing information. Complete the remaining required fields and launch your proposal by selecting the "Validate and Launch Proposal" icon from the upper-left corner of the proposal.

Once the proposal has been launched, it will move to the first step in the process, where you will be able to make your proposed changes.

You may also choose to include files with your proposals to be available for another participants' review. To attach a document, select the "Files" icon from the Proposal Toolbox.

Once you have reached the end of the form, you will need to launch the proposal. To launch, you will need to scroll back to the top of the page and click the "Validate and Launch Proposal" icon from the upper-left corner. After it has been launched, the proposal will move to the next step in the process where you will be able to leave comments.

As changes are being made, the system will now track all modifications. To review your modifications or the edits/comments made during previous steps, navigate to the "Discussion" tab. Changes to the "Prospective Curriculum" area will be listed with an "Activity Log" above the field.
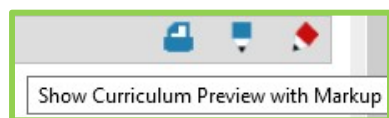
To preview the full curriculum with the markup, select the "Preview Curriculum" icon and then select the red pencil icon in the upper-right corner. You will see changes to the core descriptions, courses, and custom text denoted in green.

Tor review all steps on this proposal and their details, select the "Status" tab.

Once you are finished working in the proposal, navigate to the "Decisions" tab to approve your modifications. Unless you are a part of a later step in the process, no further action will be required.

Program Revisions/Deletions

When you have chosen to create a proposal to revise or delete a course, you will be presented with a form. Again, all fields with an asterisk (*) will be required in order to launch the proposal. As the Originator, you will be responsible for filling in the form according to the directions.

When you are creating a proposal for a program that already exists, whether you intend to revise or remove the program, you will to begin by importing the existing catalog information. Start by indicating whether this proposal is intended for a program or a shared core. [UCF does not have any shared cores in the Undergraduate Catalog for 2018-2019, so always select "program" here.]

Selecting the "Import" icon from the upper-left corner of the proposal will open a pop-up window listing all available catalogs from which you can import.

You may use the search filter to locate your desired program. To look for a program based on a specific field, or combination of fields, use the "Filter by field" drop-down menu to select a field like "Name." This will allow you to find a specific program rather than scanning through pages of results. Once you have entered the information, click "Search Available Curriculum."

Once your results have been returned, click on the title of the program you wish to import. You will then be able to preview all mapped data available to import. To complete the import, click "Import this Item." The window will close, and your proposal will be populated with the imported data.

Once you import the existing catalog data, do **not** make changes to the existing information. Complete the remaining required fields and launch your proposal by selecting the "Validate and Launch Proposal" icon from the upper-left corner of the proposal.

Once the proposal has been launched, it will move to the first step in the process, where you will be able to make your proposed changes.

As changes are being made, the system will now track all modifications. To review your modifications or the edits/comments made during previous steps, navigate to the "Discussion" tab. Changes to the "Prospective Curriculum" area will be listed with an "Activity Log" above the field.

To preview the full curriculum with the markup, select the "Preview Curriculum" icon and then select the red pencil icon in the upper-right corner. You will see changes to the core descriptions, courses, and custom text denoted in green.

To review all steps on this proposal and their details, select the "Status" tab. You may also choose to include files with your proposals to be available for other participants' review from the "Files" icon.

Once you are finished working in the proposal, navigate to the "Decisions" tab to approve your modifications on to the next step in the workflow.

My Tasks: Editing a Proposal

After a proposal is launched, you will only be able to make changes when the proposal is on a step that includes you. For example, if you are a Chair/Director, you cannot make edits when the proposal is at the college curriculum committee level.

You can view proposals that need your attention in the "My Tasks" tab of the Proposals Module. This will be the default view of the dashboard when you first log in.

You can also easily identify proposals based on the strip of color on the far left of the Proposal name:

- Green indicates that you originated a proposal
- Orange shows that the proposal needs your attention
- All other proposals will be denoted in gray

Clicking the proposal will display a "Process Summary" in the fly-out menu to the right.
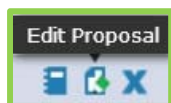
To view, edit, or make decisions on the proposal, click the "Edit Proposal" icon.

Edit a Proposal

You will be responsible for making a decision on the proposal. You may edit the fields; filling in the form according to the directions, or may leave a comment from the "Discussion" tab.

You can use the toggle in the upper right corner of the proposal to view the form full screen while making changes and then click again to view the fly-out.

To make changes to a field in the form, just click on the field, make your changes and click "Save."

You may also choose to include files with your proposals to be available for another participants' review. To attach a document, select the "Files" icon from the Proposal Toolbox.

User Tracking

As changes are being made, the system will track all modifications. To review your modifications or the edits/comments made during previous steps, navigate to the "Discussion" tab.

For programs, changes to the "Prospective Curriculum" area will be listed with an "Activity Log" above the field.

To preview the full curriculum with the markup, select the "Preview Curriculum" icon, and then select the red pencil icon in the upper-right corner. You will see changes to the core descriptions, courses, and custom text denoted in green.
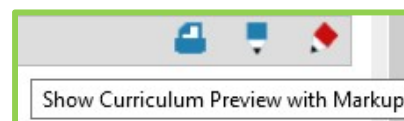
To review all steps on this proposal and their details, select the "Status" tab.

Comment on a Proposal

There are two stipulations required for commenting on a proposal. First, the proposal must be your task, meaning that an action is required from you. Secondly, the Approval Process being used will need to have comments enabled on the current step.

When viewing the proposal, you will first need to click on the "Discussion" tab in the Proposal Toolbox. Clicking the "Add Comment" link will bring a pop-up for you to enter any comments.

Finalize and publish the comment by clicking the "Add Comment" button.

You can see your comments at the top of the dialog in the Proposal Toolbox. **Comments cannot be deleted after they have been saved.**
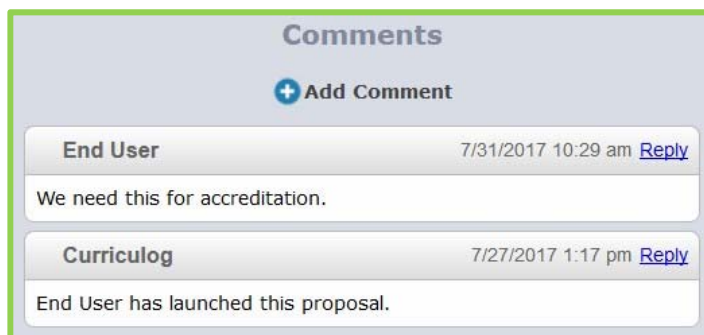
Make a Decision

Once you are finished working in the proposal, navigate to the "Decisions" tab to approve your modifications.

AGENDAS

Agendas provide functionality to create a committee meeting agenda for discussing proposals.

When a user navigates to the Agendas Module, they will see a list of agendas in the left pane.

The first ten agendas will appear in the list and further agendas can be accessed using the "Next 10" button. Each row will indicate the name of the agenda, the number of proposals attached to the agenda, when it was created and by whom.

Non-Voting Member vs Agenda Administrator

Only Agenda Administrators have the ability to create, edit, publish and make decisions upon an agenda. Agenda Administrators will have an asterisk next to their name in their step. When they navigate to the Agendas Module, they will have a link to create a "New Agenda."

An *Agenda* Administrator will **not** have all the rights and permissions that a *System* Administrator has. Agenda Administrators will be able to create agendas and approve proposals on behalf of a Committee; however, they will not have access to the Administrator Dashboard.

Non-voting members are users on a committee step who are not the Agenda Administrators. They are unable to make decisions that will move the proposal forward or backward, but they can leave their opinion on a step if they choose to have it recorded.

Create an Agenda

The Agenda Administrator will have the ability to create a new agenda when proposals are eligible for inclusion within an agenda. This happens when a proposal has reached a step that includes an Agenda Administrator and the step rules allow it.
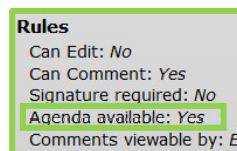
The Agenda Administrator will get a notification on their dashboard that a proposal is "Eligible for Agenda." They may click the link within the notification or navigate to the Agendas Module to create a new agenda.

A new agenda may be created by clicking on the "New Agenda" link in the upper left of any tab in the Agendas Module.
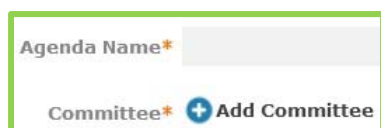
Once the agenda name is entered, click "Add Committee" to select the appropriate committee. You receive a pop-up window that lists every committee of which you are a member. Choose the committee that you need for this agenda.

Note: *You can add more than one committee to an agenda.*

The "Notes" field allows you to enter notes for this agenda such as additional information that may be covered in this meeting or notes about when and where it should take place. You can also add the order in which the agendas will be covered by your committee.

 Next, all the way at the bottom, click on "Add/Remove Proposals" to add the proposals to the agenda for review. A dialog box will open displaying all eligible proposals. Select the proposal(s) to add to the agenda and then click "Done Selecting Proposals."

The proposal(s) will now appear in the "proposals" section of the agenda. You may view the "Proposal Summary" or open the proposal itself, using the icons displayed when hovering over the proposal name.

 Publishing the agenda will make it available to all participants on the step. Until then, only the Agenda Administrator will see it. To publish the agenda, click the icon in the upper-left.
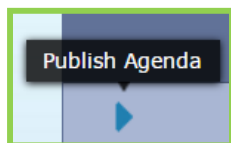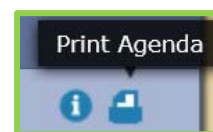
You may also print the agenda for your meeting. Printing the agenda will include the agenda details, as well as the form for each proposal that has been attached.

Manage Agenda

Make Decisions on an Agenda

To make changes to an unpublished agenda, navigate to the Agendas Module and locate the agenda. While hovering over the name, click the "Edit Agenda" icon.
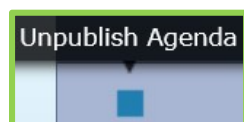
 If you need to make changes to an agenda but are unable to modify anything except the "Notes" field, you will need to unpublish the agenda first. In the upper-left corner, choose the icon, make your changes, and then publish the agenda again.
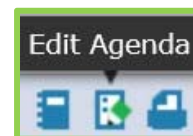
Agenda Administrators may make their decisions on behalf of the Committee on the proposal as normal or directly from the agenda. To make decisions for proposals from within the agenda, you will see "decision" to the right of its name. Click on this to view a drop-down menu where you may make a choice.

Note: *Decisions other than approve and reject will redirect you back to the proposal for action.*

From the "Status" tab on the specific proposal, the Agenda Administrator has the ability to view the opinions of the committee members. To view committee

 members, select the triangle to the left of the committee name within the step. Though the committee members' opinions are recorded, only an Agenda Administrator's vote is calculated into the final decision.
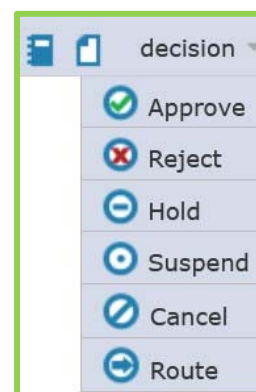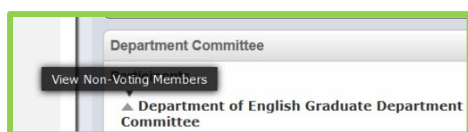
Archive an Agenda

Once all proposals on an agenda have a decision, the Agenda Administrator may archive the agenda. A message prompt will display in a pop-up window asking if you would like to archive the agenda.

This Agenda is Complete

You have no more proposals on this agenda. This agenda is now complete and ready for archiving. Would you like to archive this agenda now?(Please note that some of the proposals on this agenda may be waiting for other decisions, and have not advanced in their approval process yet.)

Archive Now   **Do Not Archive Yet**
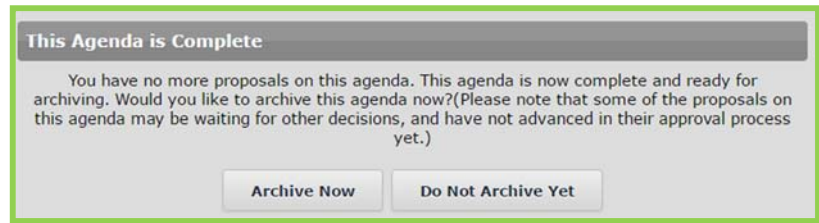
You may archive the agenda by selecting the option in the message or simply navigate to the "Archive Agenda" icon in the upper-left of the agenda at any time.

Reports Module

DETAIL REPORTS

Detail Reports will be emailed to you upon submission and are available as HTML.

Proposal Detail Report - provides the complete details of selected proposals by their entity owner, what form was used and their status. You will have the ability to include a summary of user activities (number of edits, comment count, decisions, time spent), and further details inclusive of the specific user comments, the generic system comments, any files that were attached and if there were crosslistings. (Crosslistings are not currently used in the system by UCF.)

Note: The only comments you'll see generated on the report are those that have the transparency set to be visible to every user.

Proposal Progress Report - provides the step history of proposals (based on their entity owner, what form was used and their status) in a flow diagram with user activity including if the participant made comments or edits, the date and time stamp of completion and the decision made

Impact Report –provides all dependent elements of the curriculum for a particular course, such as prerequisites, corequisites, crosslistings, programs and campuses. For example, check a catalog to see if it contains valuable relationship information for anything associated with the course. To begin, enter a prefix and code. Then, select at least one catalog you would like to search for impacts from the "Add External System" link. You may select multiple catalogs.

Historical Change Report - provides the change log of all proposal versions of a curriculum item over time. (Perhaps you have an item that has gone through the process several times and you would like to see how it has evolved.)

Support

CURRICULOG UNIVERSITY

Curriculog University is a resource designed to help you locate information and answer questions you have about using the Curriculog system. This site is available only to Curriculog users and is your gateway to using the system to its full potential. Many questions can be answered by searching within the site, through the manual, video tutorials, and FAQ section.

To access the form, select "Curriculog University" from the footer of any page once you have logged into the system. You will automatically be logged in with your Curriculog credentials.

Search

Curriculog University also includes a comprehensive search, making it easy to find content throughout the site. Simply enter a keyword into the search box, and the site will bring up all instances of your keyword.

PDF Guides and Videos

The "Video Tutorials" tab will provide a short 5-10 minute walkthrough of features within Curriculog, and the handout – available by clicking the PDF icon associated with each video – will provide step-by-step detailed instructions, along with screenshots. Flash v10.1 or higher is required to view Video Tutorials.

Knowledge Base

FAQs

This is a collection of some of the most common questions our Training and Client Care team members have heard. The list is always growing and has been categorized by topic to make it easy to locate information.
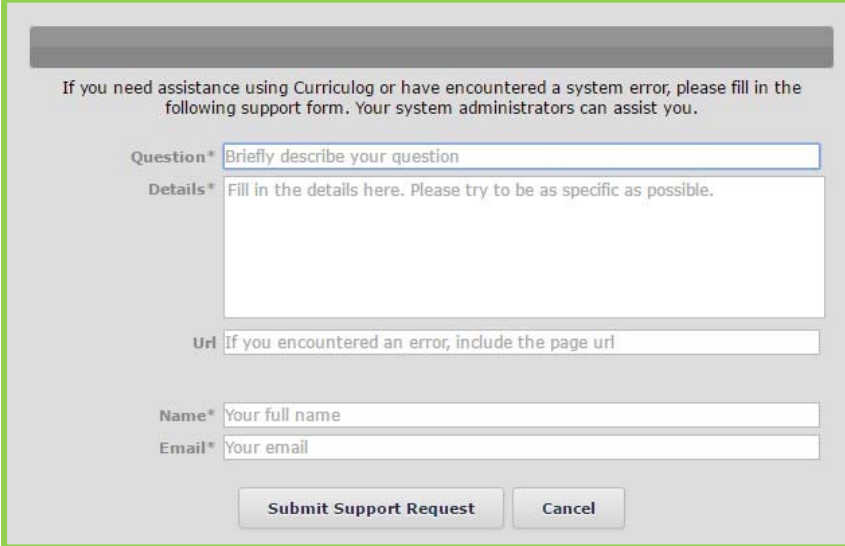
Best Practices

From the "Knowledge Base" Tab, this Best Practices guide will contain our recommendations for workflows and information about why we endorse certain things. Best practices are recommendations made by our team to help ensure that your catalog is easy to use and free of display errors. The best practices listed here will be organized by module.

Customer Forums

If the FAQ and Best Practices pages do not answer what you are looking for, the "Customer Forums" Tab will redirect users to log into the forums where clients are able to discuss how they use Curriculog, get feedback from other institutions and request features.

CONTACT AN ADMINISTRATOR

In the event you need assistance, Curriculog has a built-in help form. This form will direct your inquires to your System Administrators and may be used for any questions regarding your use of the Curriculog system. To access the form, select "Contact System Administrator" from the footer of any page once you have logged into the system.

Glossary

Accounts Module: view contact information for other users and a permissions overview for the user's own account.

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

Approval Process: A template of fields used to collect information from the end user and a set of steps to drive a workflow.

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.

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

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

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. Each proposal form has a specific Approval Process tied to them in a 1:1 relationship.

Proposal Form: Configurable, 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)

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

Smartfield: Allows the Administrator to create a field listing options - such as Prefix - for the User to select from.

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

Urgency: Configurable option to set 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.