

Version

1.0

UNIVERSITY of
HOUSTON

RAR Catalog and Curriculum Management



Curriculog Guide Proposals

CATALOG AND CURRICULUM MANAGEMENT

Curriculog Guide - Proposals

Registration and Academic Records

Catalog and Curriculum Management

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

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Curriculog

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

Features

Curriculog creates the ability to:

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

Training

Training information is located on the RAR – Catalog and Curriculum Management website:

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

Accessing Curriculog

URL

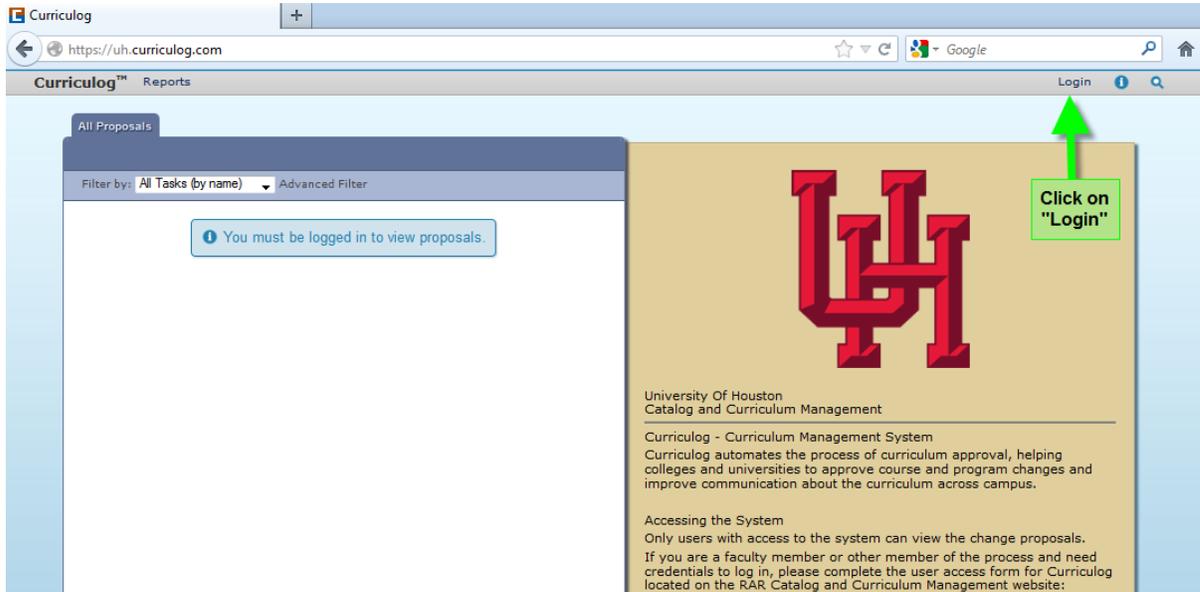
- <https://uh.curriculog.com>

Credentials

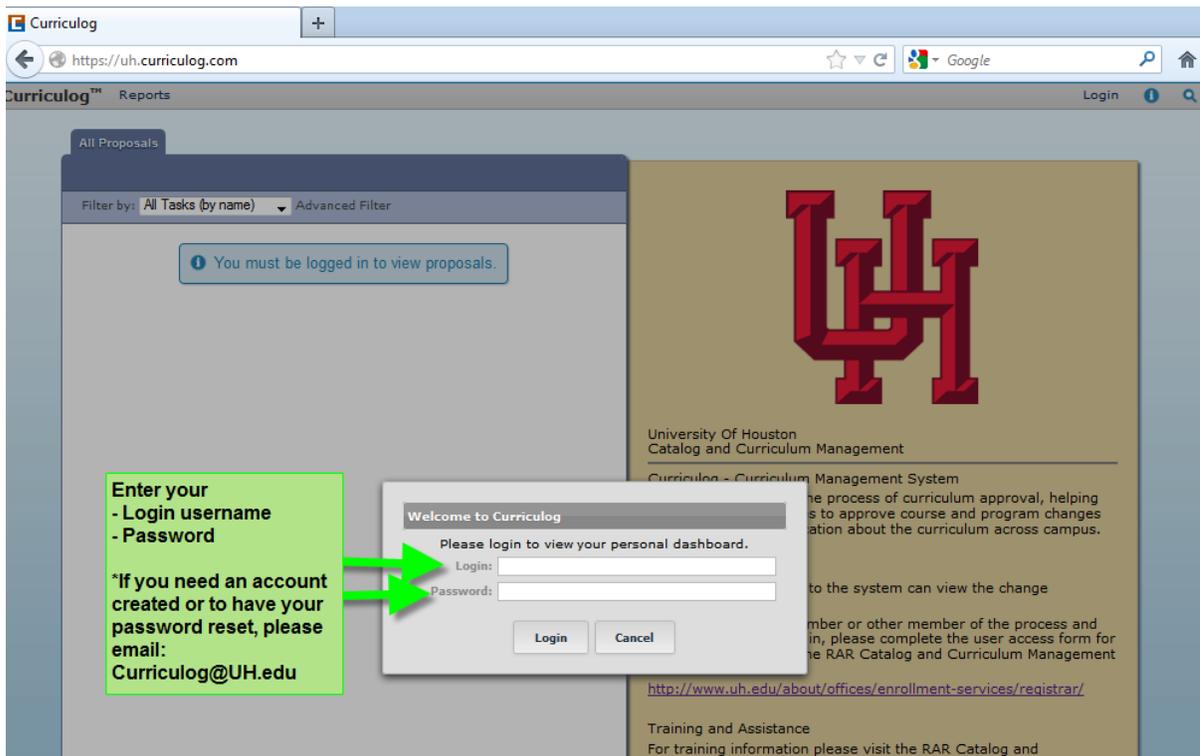
- Who has access?
 - All faculty and the staff that need to support the proposal process will have access to Curriculog.
- Username and password
 - Initial username and password will be emailed directly to the individual.
- Login support
 - Forgot Password
 - Please email Curriculog@uh.edu for password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

Login

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



2nd.

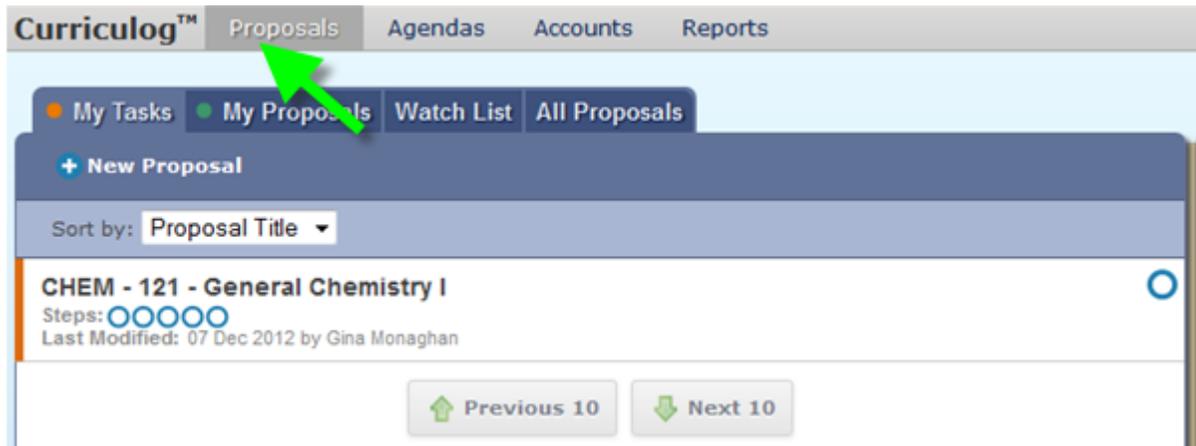


3rd.

Proposals Tab

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

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



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

Below these tabs is **+ New Proposal**. Selecting New Proposal will open the workflow to create a new proposal. The New Proposal section is explained in [below](#).

There are various icons and colors associated with the proposals.

The thin colored bar that appears to the left of the proposal will change based on the relationship with the user.



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

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

Process Summary Close X

ACC - 296 - The Accounting Cycle and Profession
Course Modification

Process Fields

Hierarchy Owner: College of Arts and Sciences
Prefix: ACC
Code: 296
Name: The Accounting Cycle and Profession
Originator: Vicky Kulig (vkulig@digarc.com)

Recent Comments

Curriculog 07/18/2013
Vicky Kulig has launched this proposal.

History

Step 1 Status: Working

Participants	Activity
Vicky Kulig	Required for Approval: 100% required Time Spent: 4 minutes Changes: No Comments: No

Step 2 Status: Incomplete

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

ACC - 296 - The Accounting Cycle and Profession
Course Modification

Proposal Toolbox Status: On

General Catalog Information

Hierarchy Owner* **College of Arts and Sciences**

Prefix* ACC Code* 296

Name* The Accounting Cycle and Profession

Hours 3 hrs

Prereq ACC 240 CoReq

Description This course covers the accounting cycle process in manual and computerized environments. The course also explores various accounting occupations and other fundamental concepts, such as the time value of money.

User Tracking

Show current

Show Individual User Edits

Comments

[Add Comment](#)

Curriculog 7/18/2013 10:57 am [Reply](#)
Vicky Kulig has launched this proposal.

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

ACCT - 421 - Advanced Accounting.' and has a toolbar with icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, and Outdent. At the bottom of the message field is a checkbox labeled 'Copy me on this email' which is checked. A 'Send Message' button is at the bottom right of the dialog." data-bbox="271 103 828 537"/>

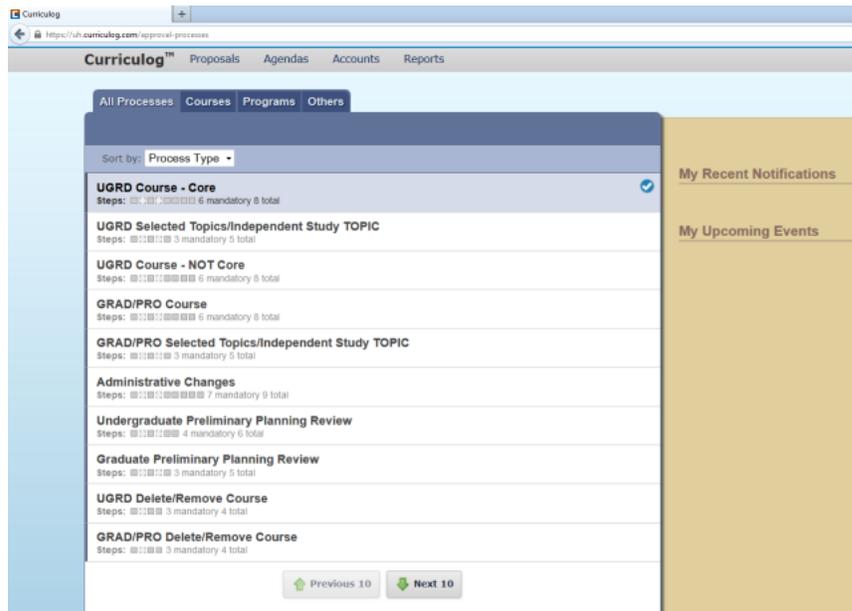
-  **Watch Proposal** - Allows you to keep track of a proposal in progress by listing under the Watch List tab.
-  **Done Watching Proposal** - Allows you to stop tracking the Proposal.
-  **My current decision** - This icon will change based on what decision you have made on the Proposal. You can click the help  icon for a key to what the different decision icons mean.
-  **Delete a Proposal** - Deleting a proposal will permanently remove it from Curriculog. Proposals cannot be deleted after they have been launched.

Create a NEW Proposal

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

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

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

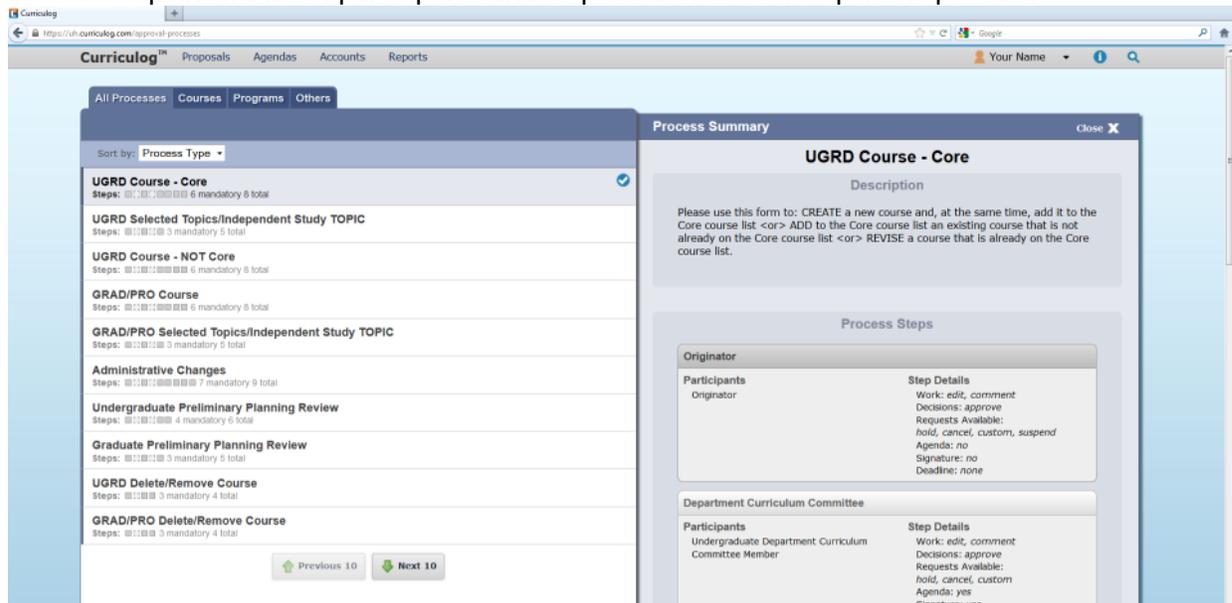


SUMMARY OF PROPOSAL CREATION STEPS

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

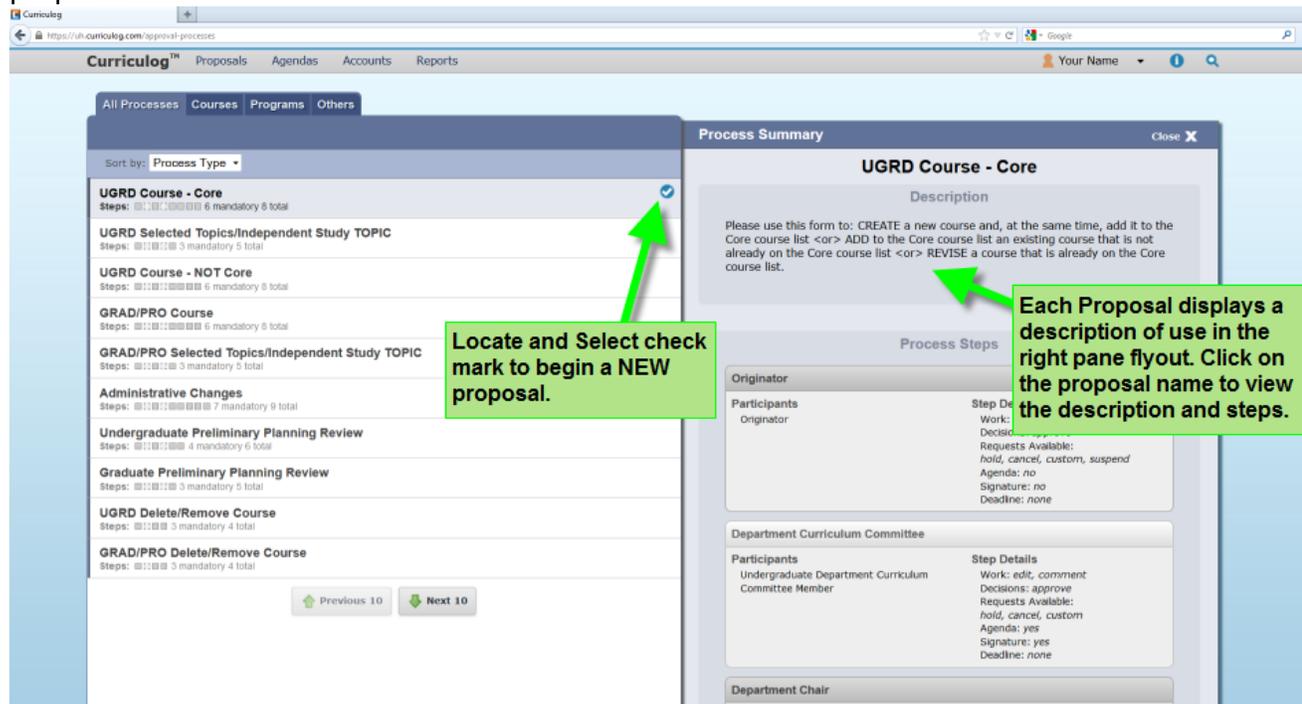
Create NEW Proposal

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



Start a proposal,

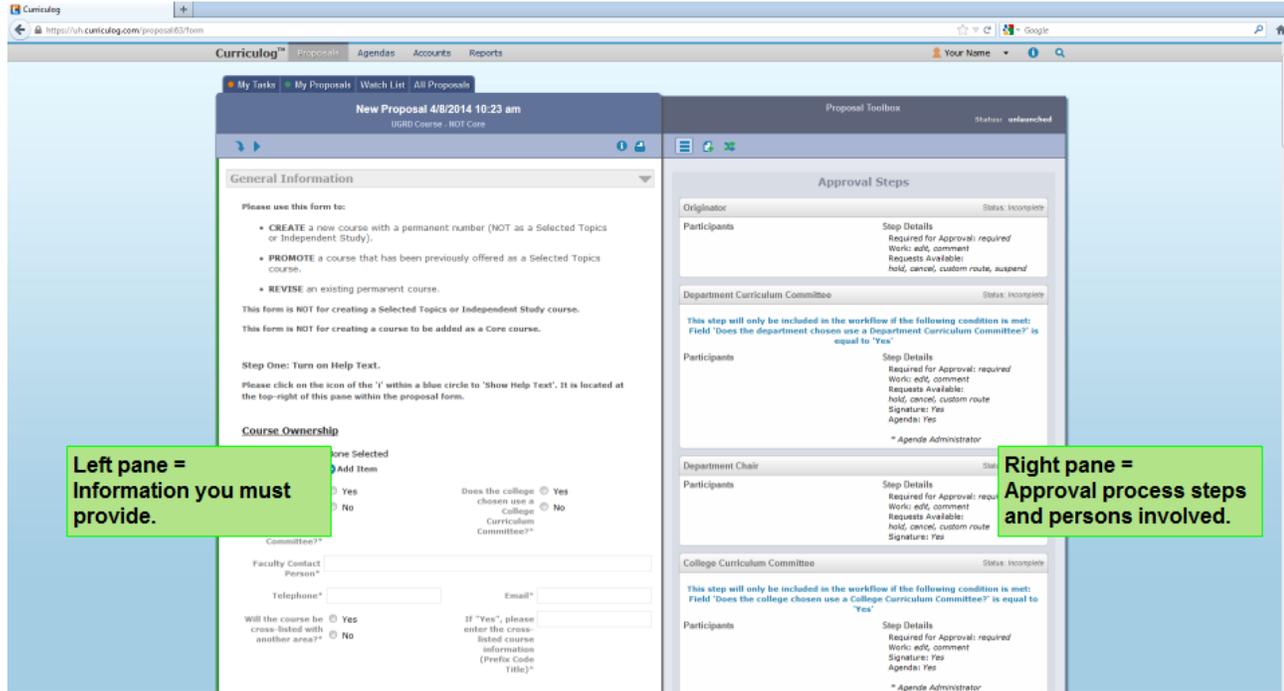
- Locate the approval process you would like to use and select the blue checkmark to start the proposal.



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

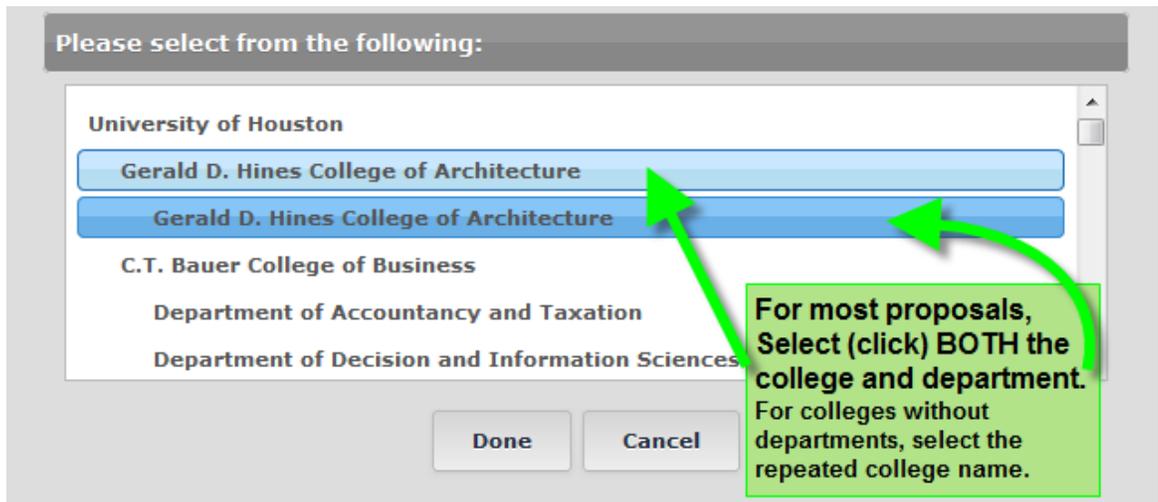
General Field Type Instructions

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



- Required Fields
Fields denoted with an asterisk, such as the Hierarchy or Program Type, are required in order to launch a Proposal.
- Smartfields
Items listed with a blue plus symbol and "Add Item" are Smartfields. When you select a Smartfield, Curriculog will launch a dialog box allowing you to select an option.



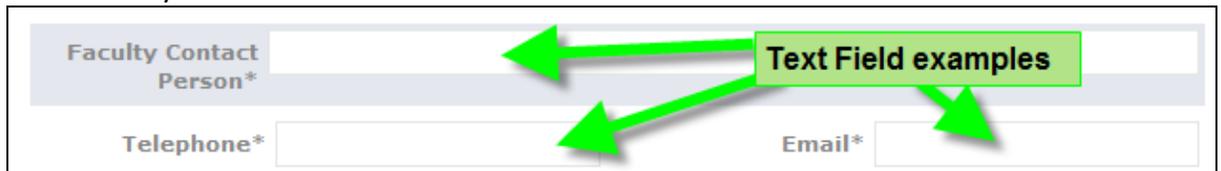


When you select an item(s), it will be highlighted blue and you will click “Done”. The item(s) selected will now be visible within the proposal form.



- Text Fields

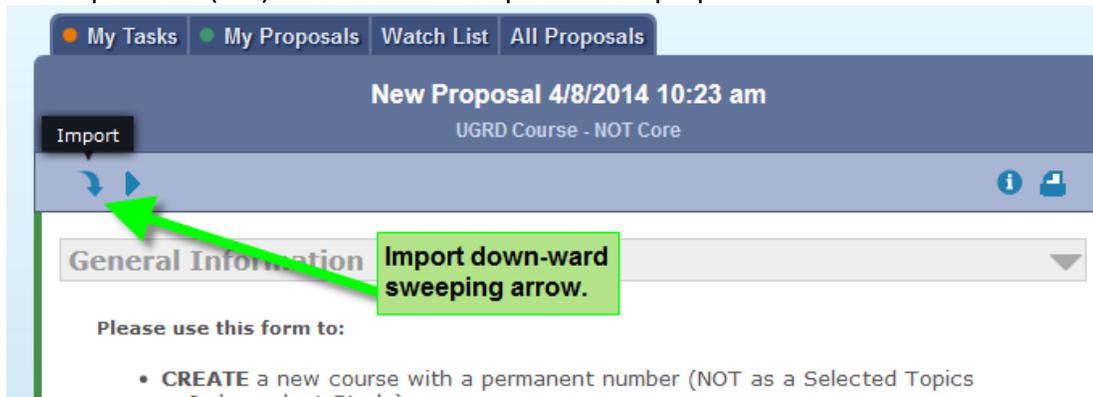
Text fields simply require you to insert text. When you click outside of the field, the text will save automatically.



- Import Data Into Proposal

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

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



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

Close Window

Import Data Into Your Proposal

Select an external system from which you would like to import curriculum data.

Acalog: 2013-2014 Undergraduate Catalog

Cancel Import

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

The screenshot shows a search interface titled "Search Undergraduate Catalog 2013 - 2014". It includes a "Filter Courses" section with a "Prefix" field set to "ARCH", an "Add another filter" dropdown menu, "Start Date" and "End Date" input fields, a "Sort Results By" dropdown menu set to "Prefix", and a checked checkbox for "Exclude previously imported items". Below the filters are three buttons: "Search Available Curriculum", "Select Another External System", and "Cancel Import". The "Search Results" section shows a list of three items: "ARCH 4333", "ARCH 3375", and "ARCH 4344". Green callout boxes with arrows point to the "ARCH" filter, the "Filter by field" dropdown, the "Sort Results By" dropdown, and the first search result.

Close Window

Search Undergraduate Catalog 2013 - 2014

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

Filter Courses

Prefix = ARCH X

Add another filter Filter by field

Start Date: End Date: Sort Results By: Prefix

Exclude previously imported items

Search Available Curriculum Select Another External System Cancel Import

Search Results (1 to 20 of 87)

- ARCH 4333
- ARCH 3375
- ARCH 4344

Callout boxes:

- Add filters to narrow your results.
- Sort your results by the options
- Select the course or program (respective to type of proposal) from the result list.

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

Import Data Into Your Proposal

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

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

Field Name	Data Preview	Import Field
» Instructional Area/Course Prefix	ARCH	<input checked="" type="checkbox"/>
» Course Number	4333	<input checked="" type="checkbox"/>
» Long Course Title	Advanced Computer Modeling in Architecture	<input checked="" type="checkbox"/>
» Credit Hours	3.0	<input checked="" type="checkbox"/>
» Prerequisite(s):	ARCH 3331 or equivalent.	<input checked="" type="checkbox"/>
» Course Description	Advanced techniques in computer-aided modeling, rendering and visualization, with an introduction to animation.	<input checked="" type="checkbox"/>
» Course Notes	[no data]	<input type="checkbox"/>

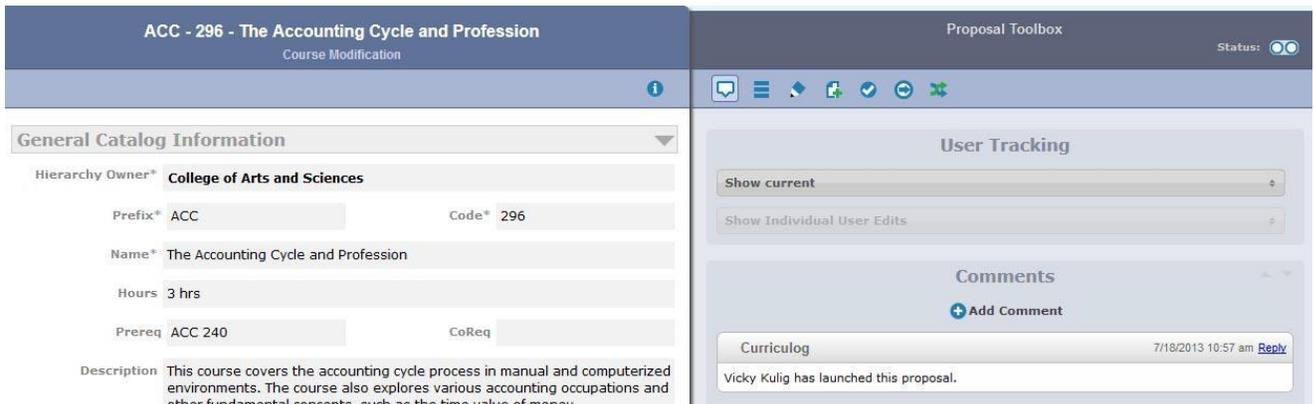
Select available fields and then import item.

Import This Item Return to Search Select Another External System Cancel Import

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

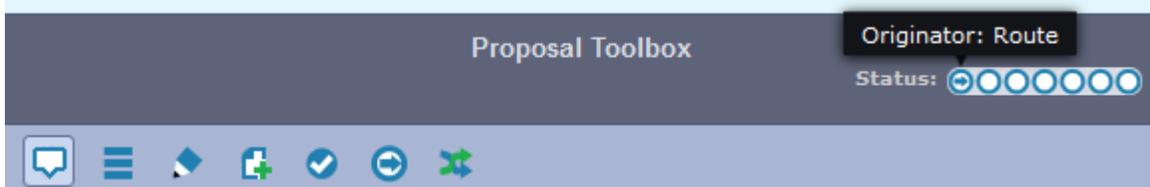
Make a Decision

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



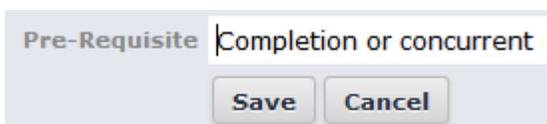
The screenshot shows the 'Proposal Toolbox' for 'ACC - 296 - The Accounting Cycle and Profession'. The left pane displays 'General Catalog Information' with fields for Hierarchy Owner (College of Arts and Sciences), Prefix (ACC), Code (296), Name (The Accounting Cycle and Profession), Hours (3 hrs), Prereq (ACC 240), and CoReq. The right pane shows 'User Tracking' with options to 'Show current' and 'Show Individual User Edits', and a 'Comments' section with an 'Add Comment' button and a comment from 'Curriculog' dated 7/18/2013 10:57 am.

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



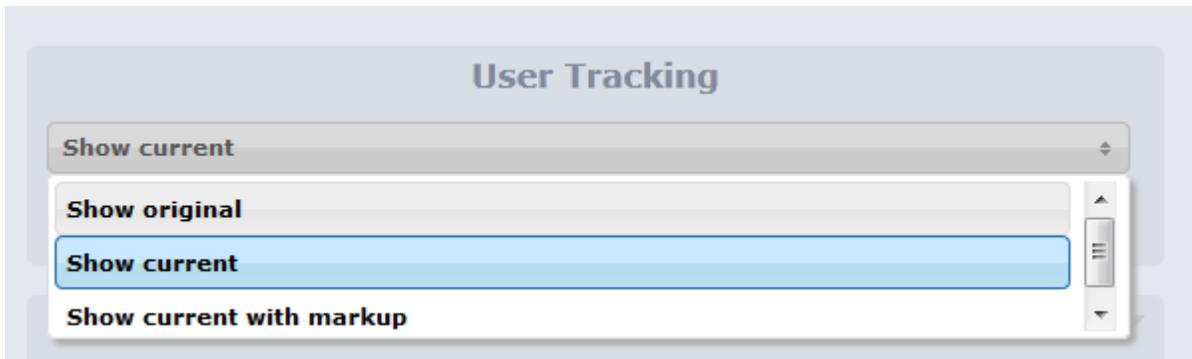
This close-up shows the 'Proposal Toolbox' header with the 'Originator: Route' and a 'Status' indicator consisting of a row of seven circles. The first circle is highlighted, indicating the current step in the proposal process.

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



The screenshot shows a text input field with the label 'Pre-Requisite' and the value 'Completion or concurrent'. Below the field are 'Save' and 'Cancel' buttons.

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



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

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

General Catalog Information

Hierarchy Owner* **College of Arts and Sciences**

Prefix* **AAS** Code* **242**

Name* **Black Women: Politics and Racism**

Hours **3 hrs**

Prereq CoReq

Description **And In depth** analysis of American politics as it relates to African American women. The course examines ways in which political issues affect Black women differently than American men, white men and white women. Considerable definition of the political realm as opposed to the non-political realm when discussing groups traditionally marginalized or excluded from political life.

Notes

Learning Objectives **No Learning Objectives**

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



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

The screenshot shows the 'Proposal Toolbox' interface. At the top, the 'Status' icon is highlighted, showing a progress bar with 10 circles: 4 green, 1 red, and 5 blue. Below the toolbox, the 'Proposal History' section is visible, containing two steps:

Step	Status	Participants	Activity
Step 1	Working	Vicky Kulig	Required for Approval: 100% required Time Spent: 3 minutes Changes: Yes Comments: No Requests Available: hold, cancel, custom route, suspend
Step 2	Incomplete	Adelaide Brook	Required for Approval: 100% required Time Spent: 0 minutes Changes: No Comments: No

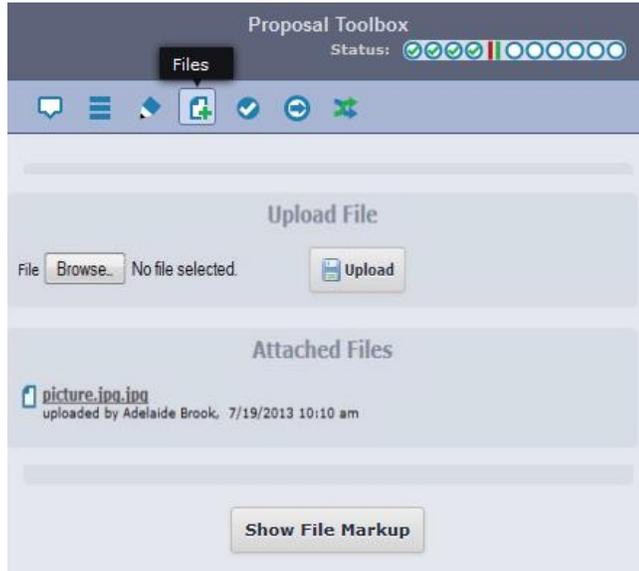
The Signatures icon displays each step and the signatures entered on the step.

The screenshot shows the 'Proposal Toolbox' interface with the 'Signatures' icon highlighted. Below the toolbox, the 'Signatures' section is visible, showing a list of signatures for different committees:

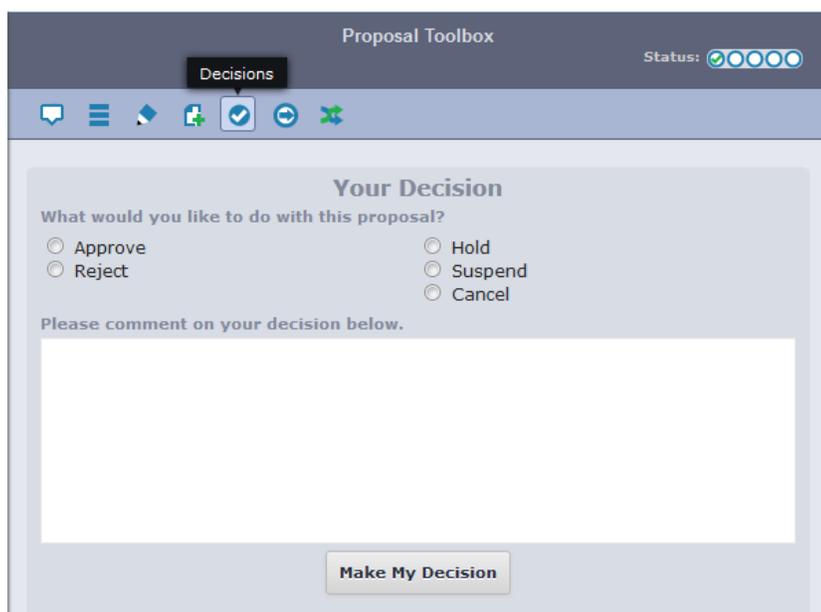
Committee	Status	Signature	Date
Department Curriculum Committee	Approved	Juanne Greene	03/27/2014
Library Unit Head	Approved	James Evans	03/27/2014
		Jamie Grimes	03/27/2014
Department Chair	Approved	Kathy Schwaig	03/28/2014
College Curriculum Committee	Incomplete		

Make A Decision

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



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



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

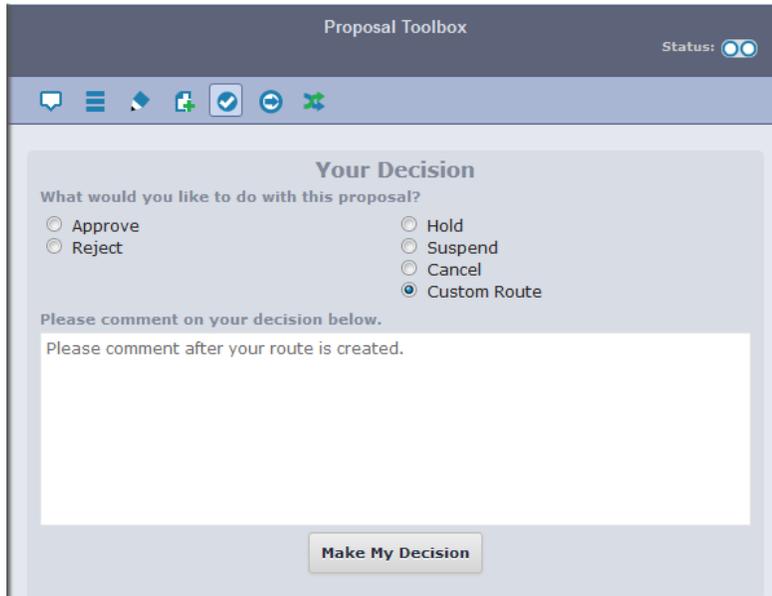
- **Hold** - Submits a request for the proposal to not advance in the approval process. The request is sent to the Administrator, who will approve or reject the request. The users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. Administrators have the ability to remove a hold on a proposal.
- **Cancel** - Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. No work will be allowed on the proposal during this time. If the Administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.
- **Suspend** - Submits a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspend is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspend placed on a proposal.

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

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

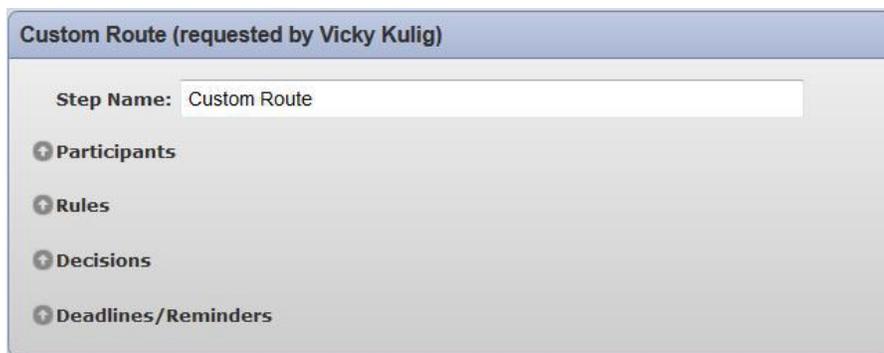
Set a Custom Route

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



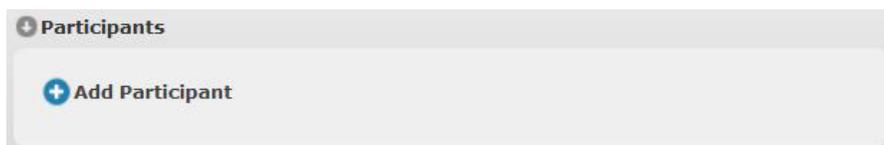
The screenshot shows the 'Proposal Toolbox' interface. At the top, it says 'Proposal Toolbox' and 'Status: ON'. Below this is a toolbar with several icons. The main area is titled 'Your Decision' and asks 'What would you like to do with this proposal?'. There are six radio button options: 'Approve', 'Reject', 'Hold', 'Suspend', 'Cancel', and 'Custom Route'. The 'Custom Route' option is selected. Below the options is a text area with the prompt 'Please comment on your decision below.' and a sub-prompt 'Please comment after your route is created.' At the bottom of the form is a button labeled 'Make My Decision'.

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



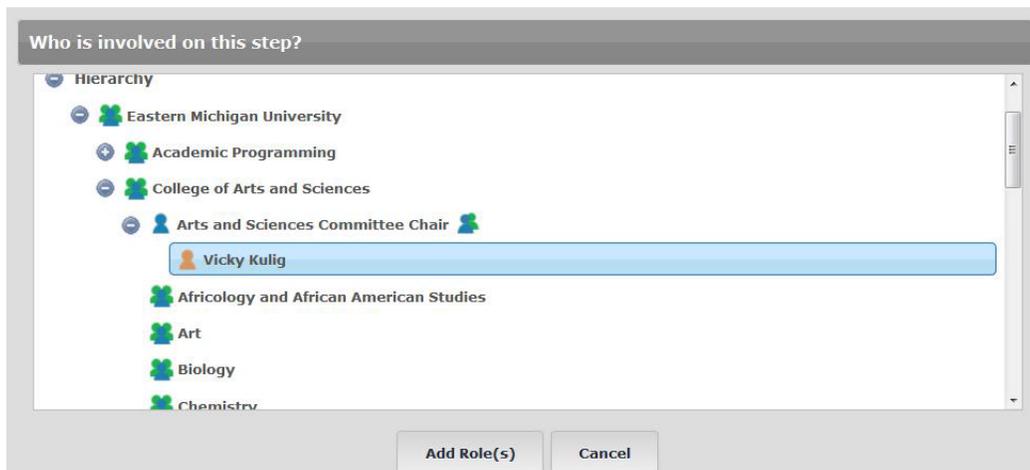
The screenshot shows a window titled 'Custom Route (requested by Vicky Kulig)'. It has a 'Step Name' field containing 'Custom Route'. Below this are four expandable sections, each with a plus sign icon: 'Participants', 'Rules', 'Decisions', and 'Deadlines/Reminders'.

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



The screenshot shows the 'Participants' section expanded. It has a plus sign icon to its left. Below the section title is a button labeled 'Add Participant' with a plus sign icon.

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



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

What work is allowed on each Proposal?

Edit Proposal

Make Comments

Is a signature required?

Yes

Is an agenda required?

Yes

Who can view the comments during this step?

Every user (login not required) ▼

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

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

- **Hold** - Allows the user to submit a request for the proposal to not move on in the approval process. The request is sent to the Administrator, who will approve or reject the request. The users

on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. Administrators have the ability to remove a hold on a proposal.

- **Cancel** - Allows the user to submit a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. No work will be allowed on the proposal during this time. If the Administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.
- **Suspend** - Allows the user to submit a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspend is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspend placed on a proposal.

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

The screenshot shows a configuration form with the following sections:

- What type of decision is this?**
 - Approve / Reject 100% for approval
 - Vote: % for approval
- What kind of decision flags will you allow to be used on this proposal?**
 - Hold
 - Suspend
 - Cancel
- Where will the proposal go after the custom route?**
 - Proposal should come back to this step.
 - Proposal should advance to the next step.
- Who should be notified when the step is completed?**
 - If Approved:**
 - If Rejected:**

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

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

My Pending Custom Route

Custom Route (requested by Vicky Kulig)

Step Name: Custom Route

- Participants
- Rules
- Decisions
- Deadlines/Reminders

Please comment on this custom route

I would like Paul's input on the matter.

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.

Request Custom Route Cancel Custom Route

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

Proposal Toolbox Status: [on]

My Pending Custom Route

Custom Route (requested by Vicky Kulig)

Step Name: Custom Route

- Participants
- Rules
- Decisions
- Deadlines/Reminders

Cancel Custom Route

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

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