Curriculum Workflow FAQ

1. **Where do I go to submit a proposal to establish, revise, or inactivate a course?**

   The former paper Form A, Form B, & GE forms have been moved to an electronic workflow. They are now referred to as "Program Management" and "Course Management". Users can access Curriculum Workflow from their My Sac State under the Curriculum Workflow section located on lower right –hand side of the home menu.

2. **Who can fill out a proposal and submit it?**

   Course and Program proposals can be initiated by all tenure-track faculty members. These proposals should be reviewed according to written department faculty curriculum policies and procedures, and should be evaluated for their curricular soundness. The workflow travels the curricular approval process based on the course/program subject not the initiator.

3. **Do I need to complete and submit a proposal in one sitting?**

   No, you may work on a proposal as long as you want. Select "Save Changes" and it will remain in your worklist as "Saved as Draft" until you submit it. When you are ready to edit the document again, make sure you are opening the proposal from your worklist and not the historical view.

4. **How can I view the contents of a proposal before I actually start one?**

   Once you have logged into Curriculum Workflow you will have the ability to search for courses/programs. After locating the course(s)/program(s) you are seeking to make changes to you can print or export these proposals to PDF or Word so hard copying editing outside of the system.

5. **The college/department/course subject I want is not in the drop-down list, what do I do?**

   Contact Academic Services at catalog@csus.edu.

6. **I am working on a proposal for an existing course/program, but there are fields on the form that are blank. Why is this information missing?**

   Fields on the course/program proposal forms that are auto-filled are done so through content housed in CMS. There are several fields on the forms that require information that has never been kept in CMS which will require authors to input this information the first time a course/program is edited within Curriculum Workflow; after the proposal has completed Workflow this information will be kept on file for any future edits made. It is highly recommended that authors work with their Department Chairs/Colleges to locate this

information (such as ELOs and Assessment Strategies) prior to/when they are working on a proposal.

If you need to start/stop a proposal, make sure that you have clicked the Save Changes button located at the bottom of the proposal form before exiting the form.

7. **Why are the pre/co-reqs on an existing course are not in the correct field on the form?**

The data being pulled from CMS to auto-populate the proposals may not be accurately formatted to correctly parse out in the forms. If you notice that there is information that is not in the correct field of the form we ask that you make the edits necessary to correct this error. For example, if the pre/co-reqs of a course are listed in the Catalog Description, and not in the correct requisite field, please delete the requisites from the description field and list them in the correct requisite field.

8. **The proposal won't let me start workflow until I complete some fields. However, I don't have the information yet to fill out those fields, what do I do?**

When you attempt to submit a proposal into workflow the system will prompt you if required information is missing or if data must be typed a certain way. If you are unsure what information is needed for the proposal it is recommended that you click the Save Changes button located at the bottom of the proposal to save the work you have done and then work with your Department Chair to gather the information necessary to complete your proposal.

9. **How do I share the proposal with colleagues before I submit/approve it?**

After you click Save Changes (located at the bottom of the proposal), the proposal will be saved with the changes you have made. This action will exit you from the proposal form, and return you to the main search where you will have the option to print the proposal or export it to PDF or Word. Changes you have made up to this point will be indicated through red and green mark up.

10. **What does the word "editing" mean under the Status column when searching for courses/programs?**

The editing status in the second column of the search results indicates that a proposal has been started, but the author of the proposal has yet to initiate the proposal into Workflow.

11. **I hit Exit and left Curriculum Workflow before I clicked Start Workflow, what do I do?**

If you did not click the Save Changes button located at the bottom of the proposal form the work you have done will not be saved and you will need to start your work again.

If you clicked the Save Changes button located at the bottom of the proposal form, your work will be saved for you to revisit again.

12. My colleague and I are collaborating on a course/program proposal; can we both make edits at the same time?

Technically, yes, two users can be in the same proposals at the same time and be making edits concurrently. However, whichever user clicks Save Changes at the bottom of the proposal first will initiate changes. This action will update the existing record of the course/program in the system; after this action, the other user making edits is working on an outdated record and their changes will not be saved.

Users are strongly encouraged to regularly click Save Changes as they are working on proposals.

13. By clicking Start Workflow at the end of the proposal, did I submit my proposal?

Yes, once you click Start Workflow at the end of the proposal your proposal will be forwarded to the first review/approval step in Workflow (traditionally this is the Department Curriculum Committee). At this time, you may review the workflow, print, export to PDF/Word, or exit the system.

14. I tried to submit/approve a proposal and received a "not authorized for this request" error. What do I do?

You may not have the required authorization for this work item. To verify your user role contact catalog@csus.edu.

15. I submitted a proposal that I now do not want to submit to Workflow. How do I remove it from Workflow?

If you no longer want your proposal to be in Workflow, you can use the In Workflow navigation located on the right hand side of the proposal to locate where in Workflow your proposal is (will appear in orange font). By clicking on this step an email to the individual will open on your computer; in this email you will request that the approver rollback the proposal to you. Rolling back the proposal will allow your proposal to exit work and to once again make edit to the proposal. Once you are satisfied with your edits, you will then resubmit the proposal into Workflow. If you are not interested in proposing any changes, once the proposals has been rolled back you do not need to take any further action.

16. What happens to a proposal after I submit/approve it?

Once a proposal has been submitted to Workflow it will be forwarded to the first review/approval step (this is traditionally the Department Curriculum Committee). As a proposal is approved it will continue on until all approvals have been met.

For example, here is a breakdown of Workflow for course proposals:
Author (Tenure-track Faculty) > Department Curriculum Committee (if role exists) > Department Chair (if role exists) > College Curriculum Committee > College Dean/Associate

Dean > Curriculum Subcommittee > Council on the Preparation of School Personnel (if applicable) > General Education Course Review Subcommittee (if applicable) > Dean of Undergraduate Studies > Dean of Graduate Studies > Enrollment Services > Registrar's Office > Catalog Editor > PeopleSoft

Note: For colleges without departments, either the College Dean/Associate Dean approves twice or separate approvers in the college are set to approve at each level.

17. How does the curriculum committee (at the department/college/faculty senate level) receive a copy of the proposal?

Once a proposal is in Workflow, each user assigned to a review/approval step will receive an email notifying them that they have a new proposal in their queue. These emails will contain specific links that will direct the reviewer/approver to the proposal needing their approval.

18. How can I change something in my workflow after I submitted/approved it?

Using the In Workflow navigation located on the right hand side of the proposal locate where in Workflow your proposal is (will appear in orange font). By clicking on this step an email to the approver will open on your computer; in this email, you can request that the user rollback the proposal to you for editing. Rolling back the proposal will allow you to once again make edits to the proposal and then resubmit it into Workflow. Please be aware that the Rollback action requires that the proposal is reviewed by all approvers in workflow again.

19. Why can't I edit a proposal in Workflow?

As a reviewer/approver you may have one or more roles that you are assigned to within Workflow. Make sure you are opening the workflow from your correct queue and not the historical view.

As an author, you can only edit proposals that you have not yet submitted to workflow. If you need to make edits to a proposal that is currently in Workflow, use the In Workflow navigation located on the right hand side of the proposal locate where in Workflow your proposal is (will appear in orange font). By clicking on this step an email to the approver will open on your computer; in this email, you can request that the user rollback the proposal to you for editing. Rolling back the proposal will allow you to once again make edits to the proposal and then resubmit it into Workflow. Please be aware that the Rollback action requires that the proposal is reviewed by all approvers in workflow again.

20. My proposal is gone, what happened?

Search for the course/program in question. You can check the Workflow and Status of the course/program in the third and fourth columns of the search results. Once you have selected a specific course/program you can verify the specific location of the proposal in workflow by seeing the In Workflow list located on the right hand side of the proposal.

21. I had to step away from a proposal and now I can't get back in. What can I do?

For security reasons, the server has a 20 minute session timeout. Therefore, if you are working on a proposal and you walk away from your desk or have to stop what you're doing, due to an interruption, your secure connection to the Course Inventory Management system server will disconnect, and the information that you may have entered on the page on the screen will be lost.

If you believe that you will have frequent interruptions while you are working on a proposal it is recommended that you click the Save Changes button located at the bottom of the proposal form every 10 minutes to assure that your work is being saved in the event that you are timed out from the system.

22. How can I follow a proposal's progress and know if it's been approved or denied?

Once a proposal has been submitted, its status will appear on the right hand side of the proposal under the In Workflow navigation. Green font indicates that the proposal has been approved and moved forward in Workflow. Orange font indicates that the proposal is currently awaiting review by this step in Workflow. Grey font indicates future review/approval steps for the proposal. If a proposal has been denied (i.e. rolled back) the author will be notified via email of the proposal status including why the proposal was rolled back to them.

23. I've just rolled back a proposal, where did it go and was anyone notified?

All rolled back proposals are returned for edits to whichever step the approver has rolled the proposal back to in Workflow. In many cases, this will be the author of the proposal. Once a proposal is rolled back, the author and all previous approvers are notified by e-mail that you returned the proposals for edits and why. *Once the author submits the proposal again, the approval process begins anew.*

24. I'm reviewing a proposal before approving and I see some items that need correcting. Can I make these edits or do I need to roll back the proposal for edits?

If the edits are minor that don't need consulting or you have consulted and the author approves them, you may make the edits yourself by clicking the blue Edit button in your Workflow queue. Please list whatever changes you have made in the comment box at the end of the document so others are aware of the edits you have made.

25. When do I need to roll back the proposal for edits rather than make the changes myself?

The decision to roll back a proposal for edits, rather than making changes yourself, will be to the discretion of the reviewer/approver. Please keep in mind that rolling back a proposal will require that the author makes edits and then resubmits the proposal through the entire Workflow process anew.

26. How do I set up a proxy/backup to approve proposals in my absence?

To establish a proxy/backup for your user role, please contact catalog@csus.edu.

27. My proposal was not/will not be approved by the annual Catalog deadline. What happens to my proposal?

If a proposal is not approved by the annual Catalog deadline (see Deadline Memo for deadlines) staff from the Office of Academic Services will manually change the "Catalog Year Effective" date to the correct catalog year for implementation.

28. I am trying to recycle a course number in a new course proposal and get an error message the course number is already in use, but this course is deactivated. How do I use a course number from a deactivated course?

If you are attempting to recycle a course number from a deactivated course you will need to contact Academic Services at catalog@csus.edu. In your email, please provide the course number of the course you are attempting to recycle.

29. I am trying to save my proposal and keep receiving the following error: "An error occurred processing our request." What does this error message mean?

Unfortunately, after about 20 minutes of inactivity, Curriculum Workflow will time out preventing any changes from being saved. Due to this timeout, we recommend that users click Save Changes every 10 minutes to assure that their work is being saved and updating the proposal record regularly.

30. I keep getting email after email that say "Approval Needed" or "Review" from the University Catalog Approvals Management and it is clogging up my inbox. How do I stop it?

If you are no longer an approver or do not need to notified of course or program changes you can email catalog@csus.edu to be removed from the role that you are no longer an approver for. If you are an active approver these emails will continue to appear in your inbox and the best practice is to create a rule in your Outlook email to filter the notification emails into a folder. Check out this guide for creating email rules: Manage email messages by using rules (microsoft.com)

31. I am attempting to copy over content from Word for a course or program proposal into the form, but it keeps copying in incorrectly. How can I copy it over without having to retype it?

First copy the information into Notepad which will remove all formatting. From Notepad you should then be able to copy the information and paste it into your course or program form without any errors.

32. I am trying to review and approve courses and/or programs in Approval Management, but there is nothing listed under my name. Where are the proposals?

Proposals currently in Workflow will only appear under the Role that is the most current reviewer/approver. When opened, Approvals Management defaults to your name in the "Your Role:" box, you will need to select the drop down arrow in the "Your Role" box and search for your approver Role. If you do not know what your approver Role is, check the email you received that notified you that you have proposals to review. A link is provided in that email that will take you directly to the role you approve for.

Training is available at:
https://www.csus.edu/academic-affairs/curriculum-workflow/trainings.html

Curriculum Workflow Trainings

Drop-In Q & A

If you have specific questions you want to ask about the Curriculum Workflow process or would like a brief refresher on a related topic (Course, Program, Approvals Management), stop by anytime during one of the following hour long Q&A sessions.

September 6th 2022 @ 10:30 – 11:30 a.m.

September 9th 2022 @ 11:30 a.m. – 12:30 noon

September 19th 2022 @ 3 – 4 p.m.

Training Materials

Workshop PowerPoints

Curriculum Workflow - Brief Overview PDF

Guides

Course Management PDF

Program Management PDF

Reviewing and Approving Proposals PDF

Program Proposal Checklist PDF

Course Proposal Checklist PDF

Frequently Asked Questions PDF

Comprehensive Training

Please sign up for a comprehensive Curriclum Workflow training session if you are new to using and/or navigating Curriclum Workflow.

Sign Up Here FORM

Comprehensive Zoom training sessions will be available in the Fall as well as Drop-In Zoom sessions if you should you have a quick question or want to review a specific topic.