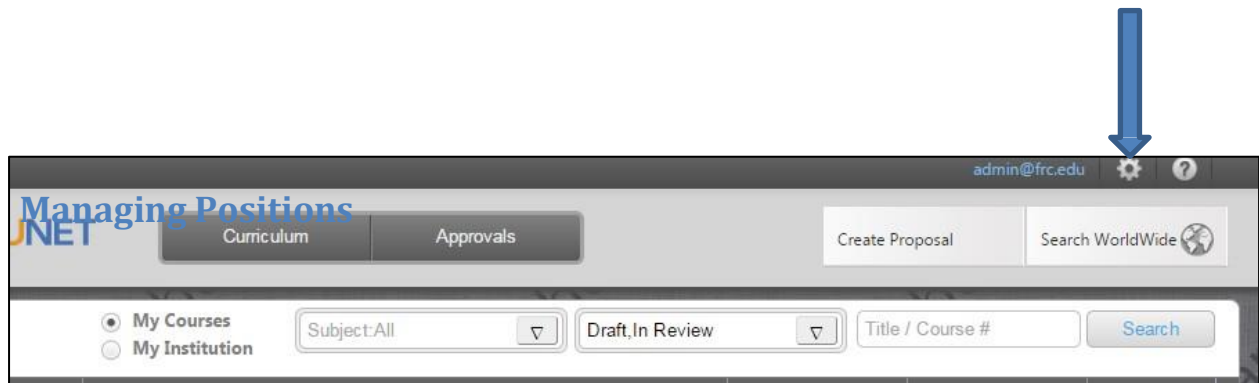




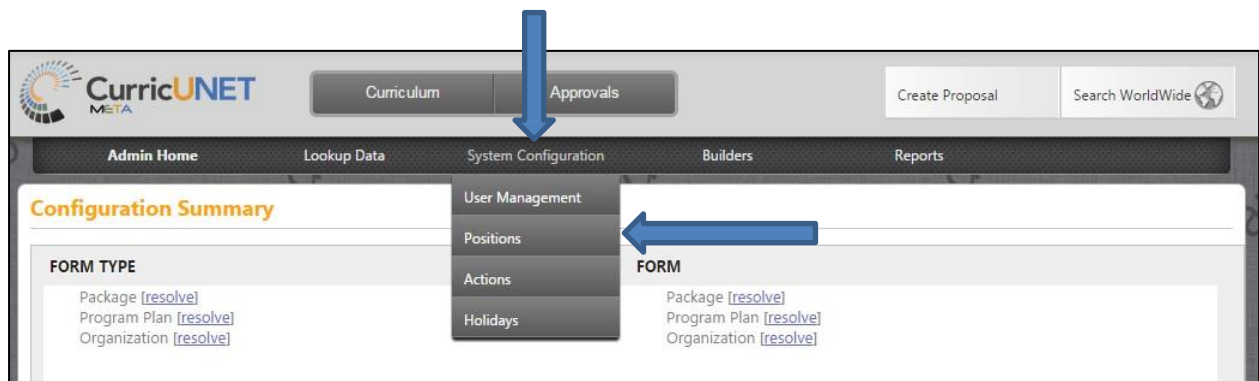
Administrative Manual

Contents

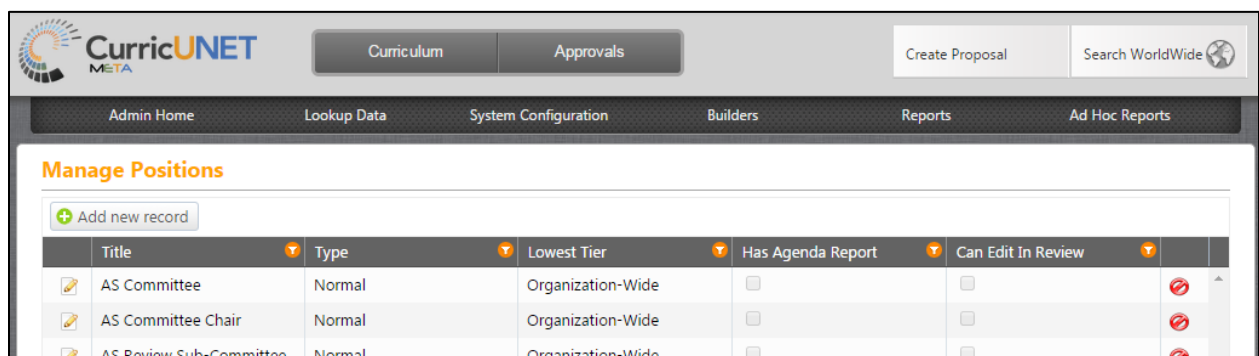
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To access the page for managing positions, you first push on the gear icon on the top right of the screen. When you press on this icon a list will appear. Press on “Administer Site”.

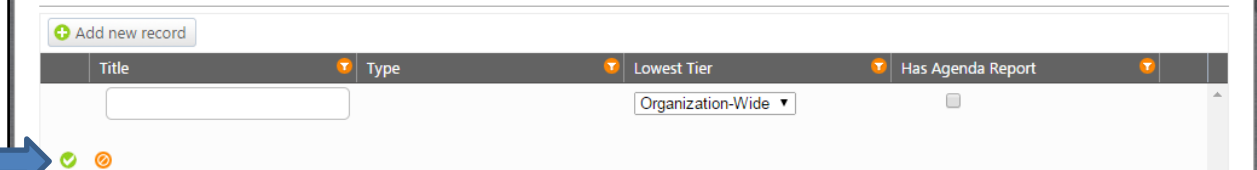


Press on the “System Configuration” option in the middle of the screen. After that is selected a drop down menu will appear from which you select “Positions”.



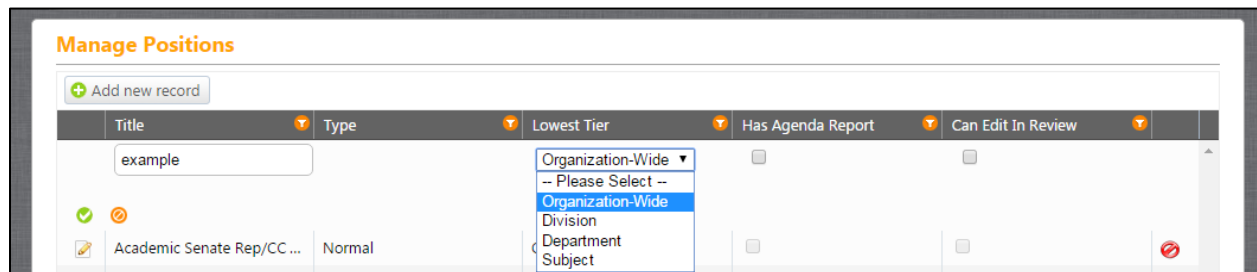
Add New Position

On the Manage Position's page, you can click on "Add new record".



| Title | Type | Lowest Tier | Has Agenda Report |
|----------------------|------|-------------------|--------------------------|
| <input type="text"/> | | Organization-Wide | <input type="checkbox"/> |

Put the name of your position in the "Title" field and then choose from the "Lowest Tier" drop down. The selection here determines whether the user assigned to this position will have rights organization wide, to a specific division, department, or subject. Always choose the lowest tier that assignments will be made at. For instance, if you will assign users to the position and they will only have rights to certain subjects you would want to choose "Subject" as the lowest tier. If however the position is Department Chair you would want to assign the lowest tier as "Department".



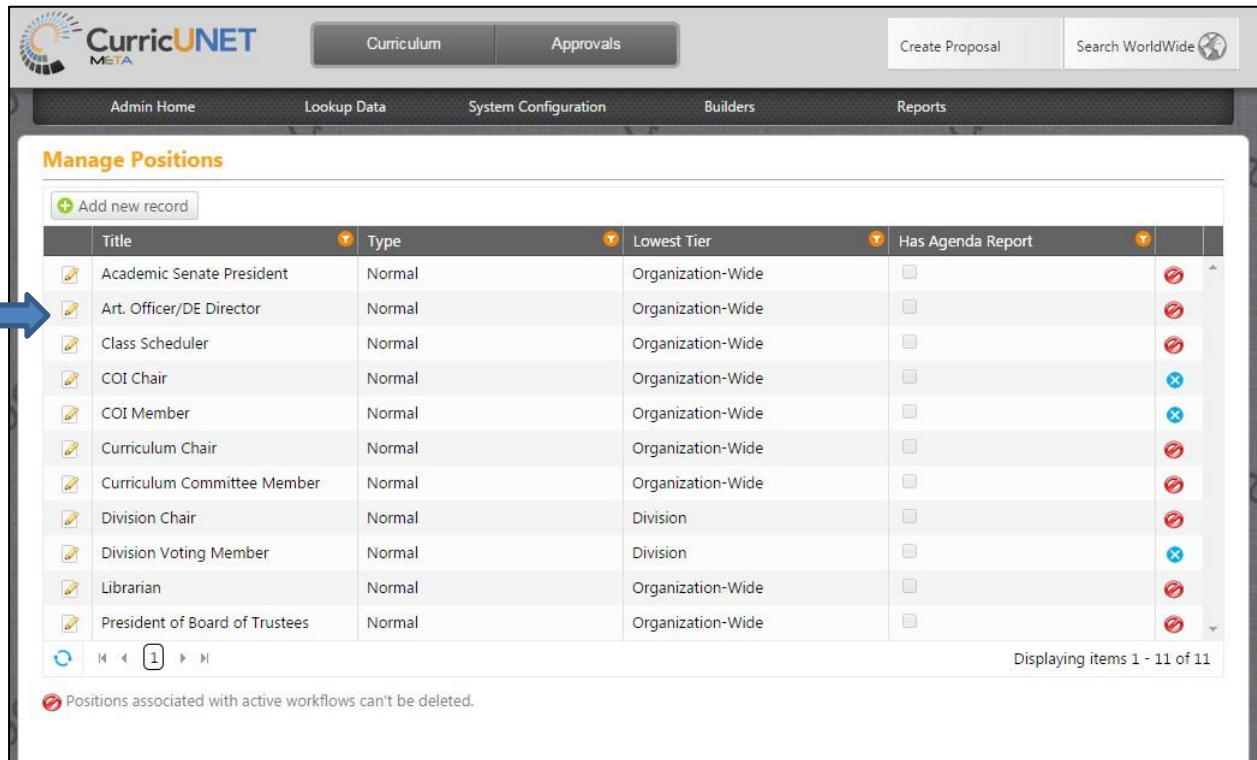
| Title | Type | Lowest Tier | Has Agenda Report | Can Edit In Review |
|----------------------------|--------|-------------------|--------------------------|--------------------------|
| example | | Organization-Wide | <input type="checkbox"/> | <input type="checkbox"/> |
| Academic Senate Rep/CC ... | Normal | Subject | <input type="checkbox"/> | <input type="checkbox"/> |

By checking the box for "Has Agenda Report" this position will appear in the Agenda Report.

By check the box for "Can Edit in Review" this allows the position to make edits to proposals that are at their level in the approval process.

When you have added in your new position selections you can press the green check icon to save.

Edit a Position



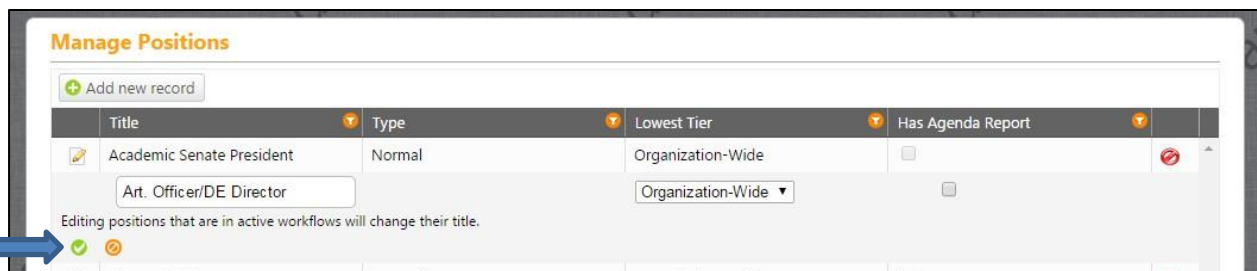
The screenshot shows the CurricUNET interface with the 'Manage Positions' section. A blue arrow points to the pencil icon next to the 'Art. Officer/DE Director' position in the table.

| Title | Type | Lowest Tier | Has Agenda Report |
|--------------------------------|--------|-------------------|--------------------------|
| Academic Senate President | Normal | Organization-Wide | <input type="checkbox"/> |
| Art. Officer/DE Director | Normal | Organization-Wide | <input type="checkbox"/> |
| Class Scheduler | Normal | Organization-Wide | <input type="checkbox"/> |
| COI Chair | Normal | Organization-Wide | <input type="checkbox"/> |
| COI Member | Normal | Organization-Wide | <input type="checkbox"/> |
| Curriculum Chair | Normal | Organization-Wide | <input type="checkbox"/> |
| Curriculum Committee Member | Normal | Organization-Wide | <input type="checkbox"/> |
| Division Chair | Normal | Division | <input type="checkbox"/> |
| Division Voting Member | Normal | Division | <input type="checkbox"/> |
| Librarian | Normal | Organization-Wide | <input type="checkbox"/> |
| President of Board of Trustees | Normal | Organization-Wide | <input type="checkbox"/> |

Displaying items 1 - 11 of 11

Positions associated with active workflows can't be deleted.

This is an example list of all the positions which exist within an institution. If you would like to make changes to a position, press the pencil symbol to the left of the position title.

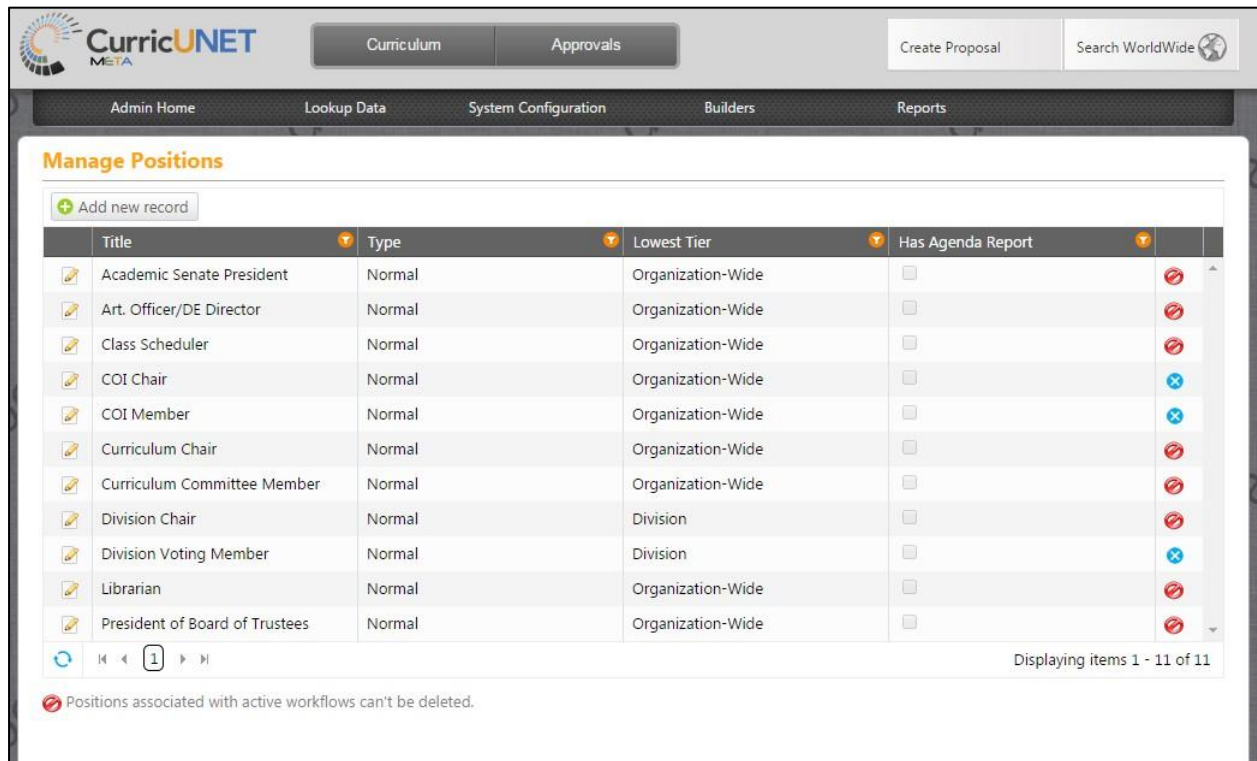


The screenshot shows the 'Manage Positions' section with the 'Art. Officer/DE Director' position selected for editing. A blue arrow points to the green checkmark icon at the bottom left of the form.

Editing positions that are in active workflows will change their title.

From here you can type in a new title in the text box, as well as make adjustments in type or tier. When desired changes have been completed, press the green check icon to save.

Deactivate a Position




Manage Positions

+ Add new record

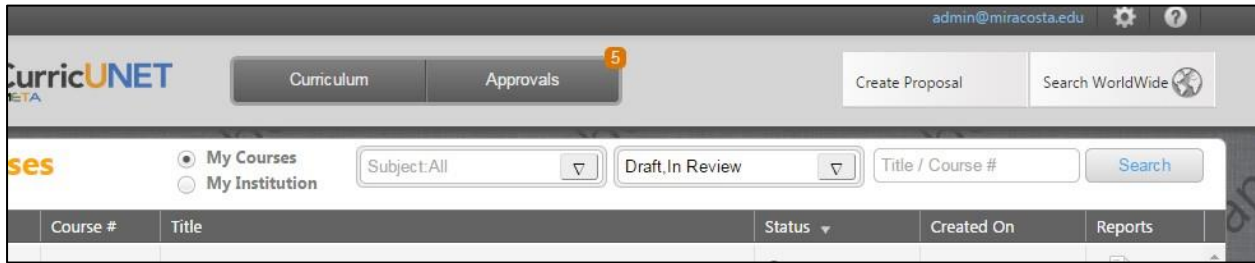
| Title | Type | Lowest Tier | Has Agenda Report |
|--------------------------------|--------|-------------------|--------------------------|
| Academic Senate President | Normal | Organization-Wide | <input type="checkbox"/> |
| Art. Officer/DE Director | Normal | Organization-Wide | <input type="checkbox"/> |
| Class Scheduler | Normal | Organization-Wide | <input type="checkbox"/> |
| COI Chair | Normal | Organization-Wide | <input type="checkbox"/> |
| COI Member | Normal | Organization-Wide | <input type="checkbox"/> |
| Curriculum Chair | Normal | Organization-Wide | <input type="checkbox"/> |
| Curriculum Committee Member | Normal | Organization-Wide | <input type="checkbox"/> |
| Division Chair | Normal | Division | <input type="checkbox"/> |
| Division Voting Member | Normal | Division | <input type="checkbox"/> |
| Librarian | Normal | Organization-Wide | <input type="checkbox"/> |
| President of Board of Trustees | Normal | Organization-Wide | <input type="checkbox"/> |

Displaying items 1 - 11 of 11

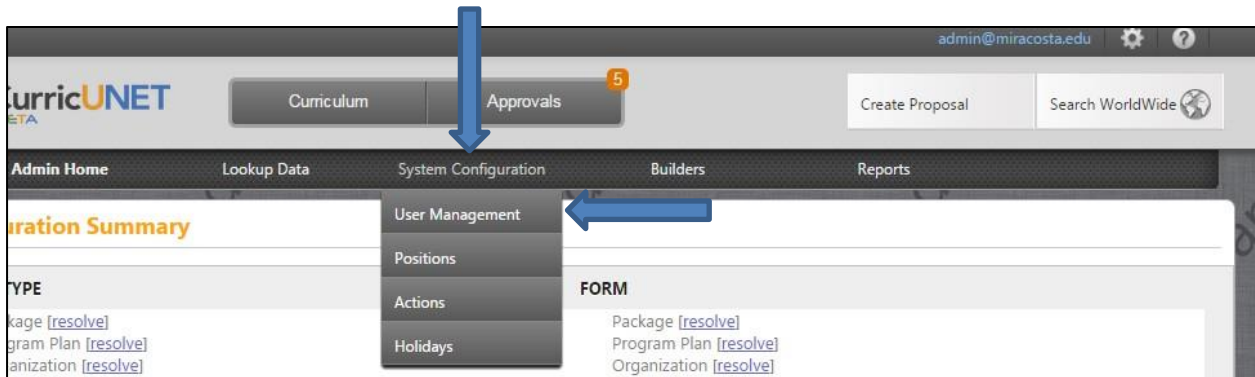
Positions associated with active workflows can't be deleted.

To deactivate a position, click on the blue “x” icon on the right. If there is only a red , that means that particular position is involved in an active workflow process and cannot be deactivated.

User Management



To get to the User Administration area, push on the gear icon on the top right of the screen and select “Administer Site”.



This is the Administration area. To manage users, press on “System Configuration” and select “User Management”.

****Important-** If you need to change a user’s information (last name, phone number, email address, etc.) you have to make the changes to their current user profile. In order for the system to operate properly you cannot add a new record for their changes, the changes must be made to that user’s current record. This is due to the fact that permissions and proposals will already be tied to that user record.

Curriculum Approvals Create Proposal Search WorldWide

Admin Home Lookup Data System Configuration Builders Reports

Admin > Users

Users

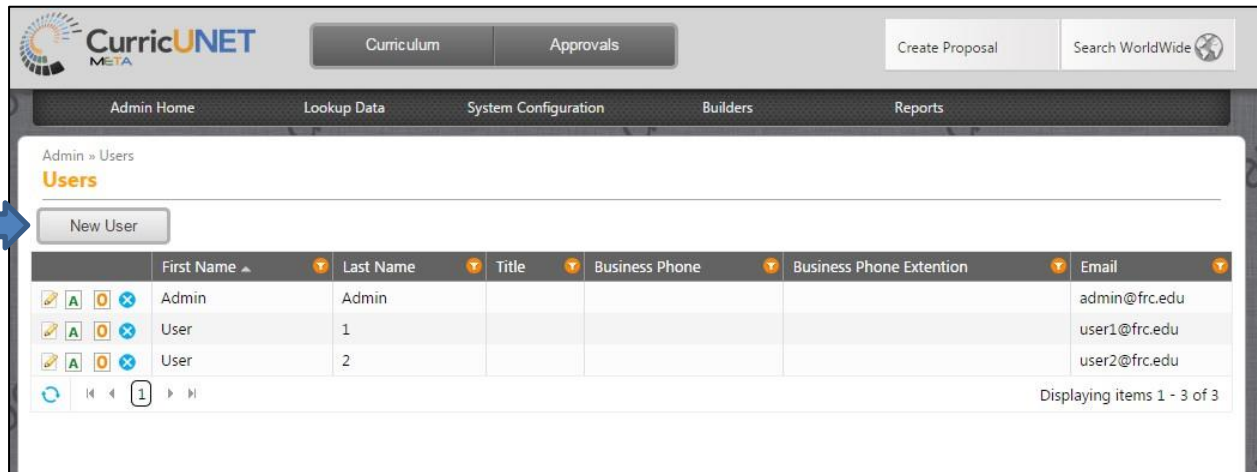
New User

| | First Name | Last Name | Title | Business Phone | Business Phone Extension | Email |
|--|------------|-----------|-------|----------------|--------------------------|---------------|
| | Admin | Admin | | | | admin@frc.edu |
| | User | 1 | | | | user1@frc.edu |
| | User | 2 | | | | user2@frc.edu |

Displaying items 1 - 3 of 3

This area lists all of your users that are in the Meta system. On the bottom you can push on the numbers to go from screen to screen. If the user list does not come up in alphabetical order and you would like it to be, just press on the “Last Name” label and it will re-order them by last name alphabetical order.

Add New User

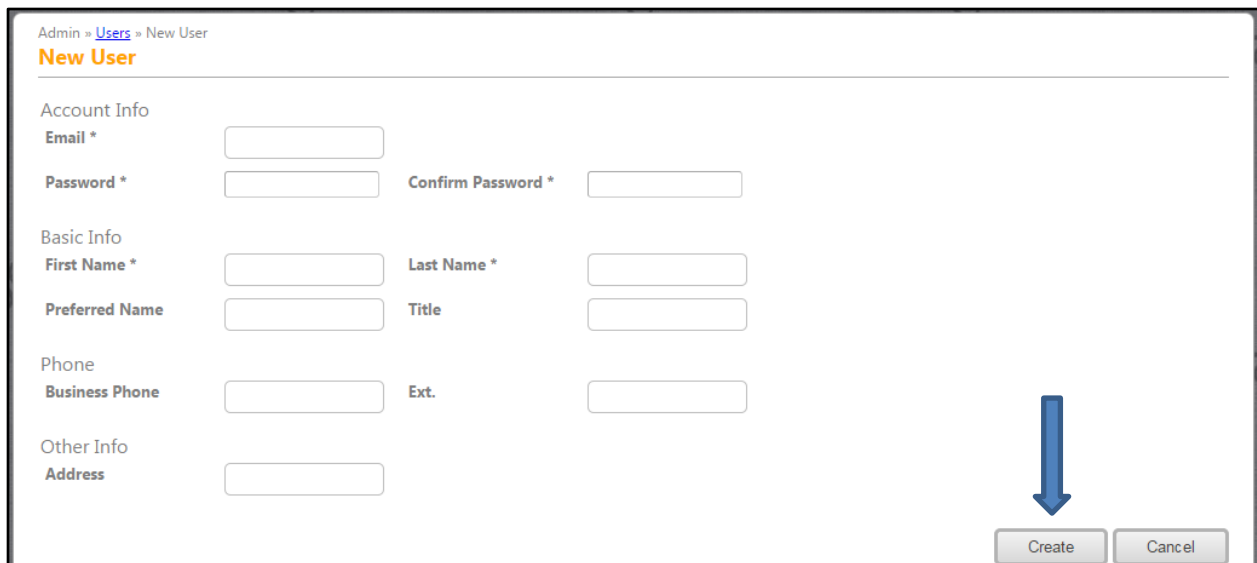


The screenshot shows the CurricUNET interface with the 'Users' list view. A blue arrow points to the 'New User' button. The list contains three items:

| | First Name | Last Name | Title | Business Phone | Business Phone Extension | Email |
|-------|------------|-----------|-------|----------------|--------------------------|---------------|
| Admin | Admin | Admin | | | | admin@frc.edu |
| User | | 1 | | | | user1@frc.edu |
| User | | 2 | | | | user2@frc.edu |

Displaying items 1 - 3 of 3

This is how the list views after being put into alphabetical order. To create a new user, press on the “New User” button.



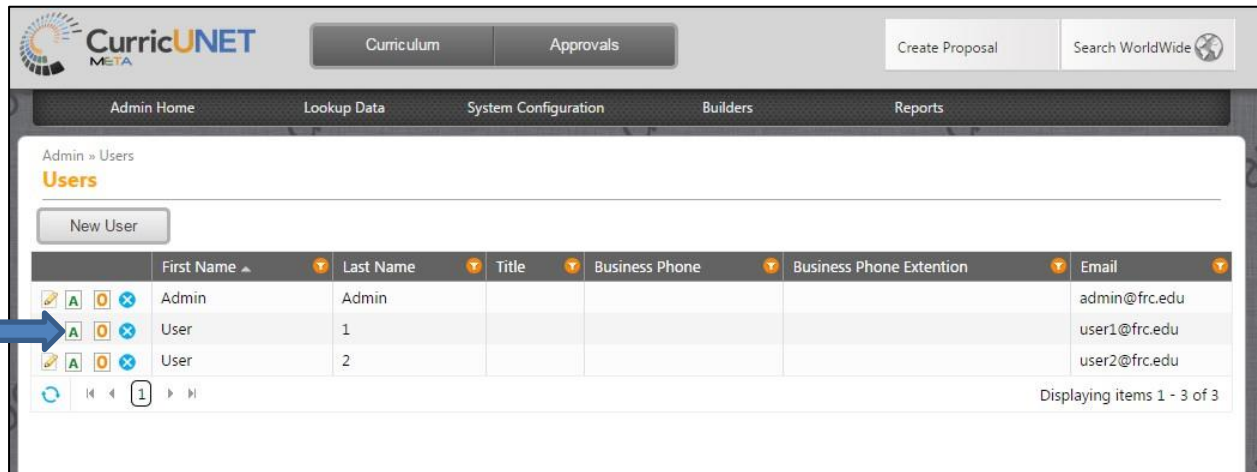
The screenshot shows the 'New User' form with the following fields:

- Account Info: Email *
- Password * and Confirm Password *
- Basic Info: First Name *, Last Name *, Preferred Name, Title
- Phone: Business Phone, Ext.
- Other Info: Address










A blue arrow points to the 'Create' button.

On this screen you can enter in the information for the new user you are creating. When complete, press “Create”.

Add/Edit Approval Permissions



The screenshot displays the CurricUNET system interface. At the top, there are navigation tabs for 'Curriculum' and 'Approvals', along with buttons for 'Create Proposal' and 'Search WorldWide'. Below this is a secondary navigation bar with 'Admin Home', 'Lookup Data', 'System Configuration', 'Builders', and 'Reports'. The main content area is titled 'Admin » Users' and 'Users'. A 'New User' button is visible. A table lists three users:

| | First Name | Last Name | Title | Business Phone | Business Phone Extension | Email |
|---|------------|-----------|-------|----------------|--------------------------|---------------|
|    | Admin | Admin | | | | admin@frc.edu |
|    | User | 1 | | | | user1@frc.edu |
|    | User | 2 | | | | user2@frc.edu |

At the bottom of the table, there are pagination controls showing '1' and 'Displaying items 1 - 3 of 3'.

You can access the screen to view or edit approval permissions by pressing on the green “A” icon to the left of the users name.

****Important- If you are changing approval permissions positions from one use to another you first MUST remove the position from the old user before you add that position to the new user. The same applies if you are deleting a user from the system who has approval permissions. You first must remove the positions from that user BEFORE you delete the user.**

The screenshot shows the CurricUNET interface. At the top, there are navigation tabs for 'Curriculum' and 'Approvals' (with a notification badge). Below the navigation bar, there are menu items: 'Admin Home', 'Lookup Data', 'System Configuration', 'Builders', and 'Reports'. The main content area is titled 'Approval Permissions for Samuel Arenivar (sarenivar@miracosta.edu)'. Underneath, it says 'Approval Permissions' and 'Arenivar, Samuel'. There is a table with two columns: 'Position' and 'Selected'. The first row is 'Department Chair' with a pencil icon on the left and a plus sign in the 'Selected' column. The second row is 'Faculty Member' with a pencil icon on the left and a plus sign in the 'Selected' column. Below the table, there is an 'Add Permission' button.

| Position | Selected |
|------------------|----------|
| Department Chair | + |
| Faculty Member | + |

To edit permissions push on the little pencil icon on the left on the “Approval Permissions” page.

Admin » Users » Approval Permissions for Samuel Arenivar (sarenivar@miracosta.edu) » Update Permissions

Approval Permissions

Arenivar, Samuel

Update Permissions

Position:

Filter On:

Begin Date:

End Date:

Division

Academic Information Services

Arts & International Languages

Career & Technical Education

Community Learning Center, Behavioral Sciences, History, & Community Education

Counseling

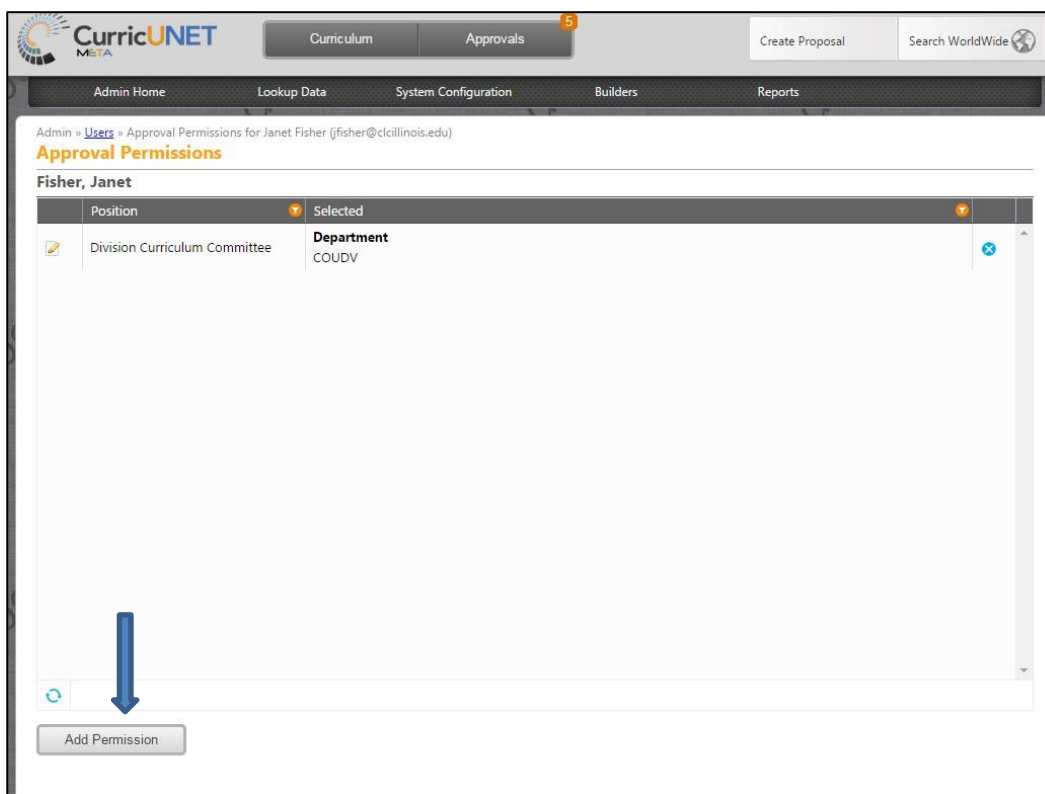
Letters & Communication Studies

Math & Sciences

You will then be brought to the “Update Permissions” screen.

****Important-** When you come to this screen you **MUST select the areas that this user is assigned to**. If you press “Update” without making your division, department, or subject selections this user will be assigned to every area, and will start receiving notifications for every single proposal that is in review. You will need to assign the permissions to the lowest level of hierarchy that the user should have rights to. There should be no need to add a user at multiple levels and in fact that would cause unexpected behavior in the approval process. For example, if your position is assigned at the department level, assigning user permissions at the division level will give that user permission for every department in the division, even if you specify the specific departments underneath it as well. In that situation what you should do is just make the assignments at the department level. It is however, permissible to add permissions at the division level if the user is supposed to have rights to all departments in that division.

Select either “Division” or “Department” from the “Filter On” drop down. (The “Filter On” options may vary for your institution). In this example we are using “Division”. Select the grey box under “Division” for the Divisions that this user, with this position, should have approval permissions for. The boxes that are selected will turn darker grey. If desired, you can also select an “End Date” for when this user’s approval permissions will expire for this position.



To add another approval process position to this user, press on the “Add Permission” button.



Push on the arrow on the right side of the box labeled “Position” to open the drop down list.

Add Permission

Position:

Filter On:

Begin Date:

End Date:

Division

| | | | | | | |
|--------------------------------|-----------------------------------|-----------------------------------|------------------------------|----------------------|------------------------------------|---|
| Behavioral and Social Sciences | Business | Career and Technical Education | Communications and Languages | Continuing Education | Counseling and Student Development | Disabled Students Programs and Services |
| Health Science and Nursing | Kinesiology, Dance, and Athletics | Library and Instructional Support | Mathematics and Sciences | Public Safety | Arts and Cultural Programs | |

This will give you a list of possible positions to select from. After selecting desired position you need to make the filtering selections at this time. ****Important** -If you press “Add” before selecting which division, departments and subjects that this position has access to they will be assigned to every area and will start receiving notifications and approval rights for every area.

Add Permission

Position:

Filter On:

Begin Date:

End Date:

Division

| | | | | | | |
|--------------------------------|-----------------------------------|-----------------------------------|-------------------------------------|----------------------|------------------------------------|---|
| Behavioral and Social Sciences | Business | Career and Technical Education | Communications and Languages | Continuing Education | Counseling and Student Development | Disabled Students Programs and Services |
| Health Science and Nursing | Kinesiology, Dance, and Athletics | Library and Instructional Support | Mathematics and Sciences | Public Safety | Arts and Cultural Programs | |

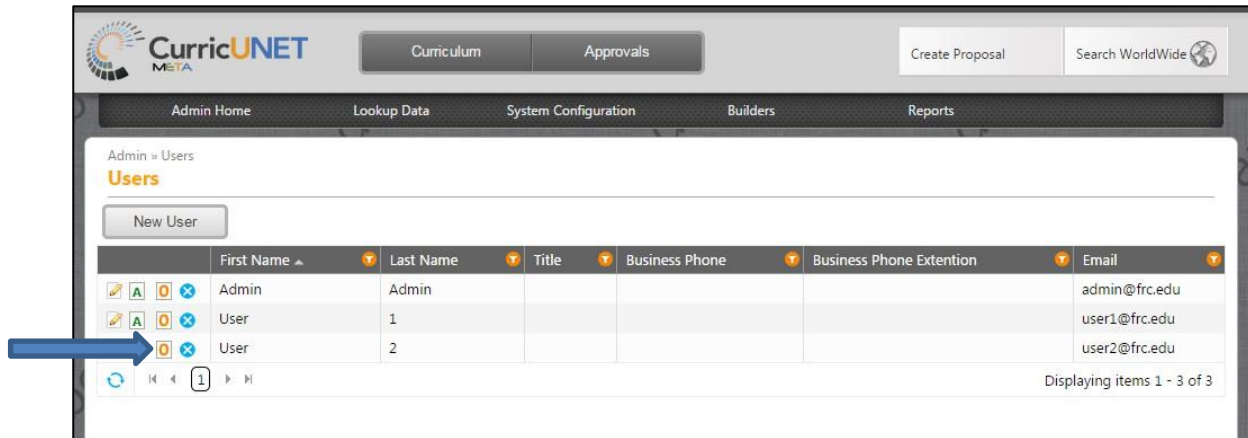
You will need to assign the permissions to the lowest level of hierarchy that the user should have rights to. There should be no need to add a user at multiple levels and in fact that would cause unexpected behavior in the approval process. For example, if your position is assigned at the department level, assigning user permissions at the division level will give that user permission for every department in the division, even if you specify the specific departments underneath it as well. In that situation what you should do is just make the assignments at the department level. It is however, permissible to add permissions at the division level if the user is supposed to have rights to all departments in that division.

Select either "Division" or "Department" from the "Filter On" drop down. (The "Filter On" options may vary for your institution). In this example we are using "Division". Select the grey box under "Division" for the Divisions that this user, with this position, should have approval permissions for. The boxes that are selected will turn darker grey. If desired, you can also select an "End Date" for when this user's approval permissions will expire for this position.

After you have assigned the filtering press "Add" to save your selections.

To deactivate a permission position, push on the blue "x".

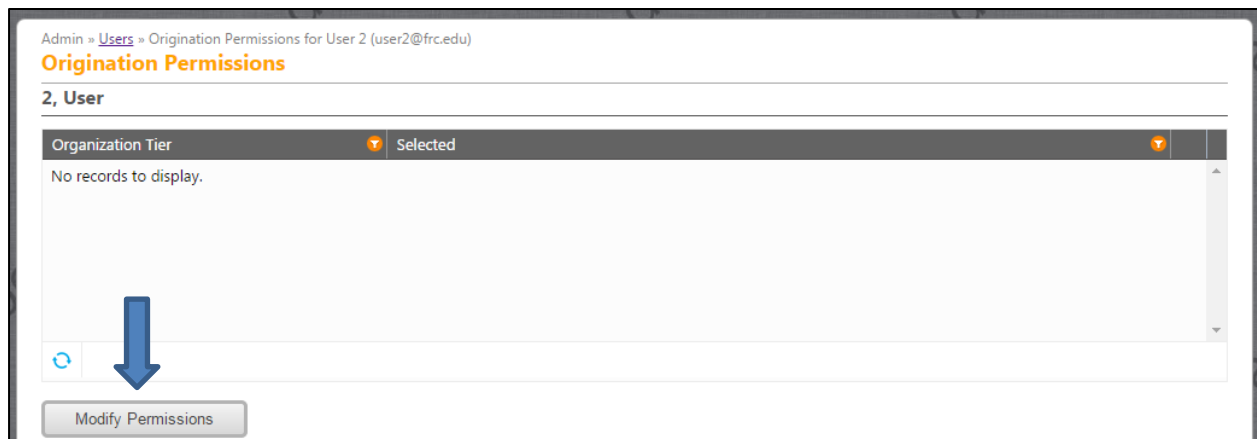
Originator/Regular Faculty Origination Rights



The screenshot shows the CurricUNET interface with the 'Users' page selected. A table lists three users: 'Admin', 'User 1', and 'User 2'. Each user has an orange 'O' icon in the action column. A blue arrow points to the 'O' icon for 'User 2'.

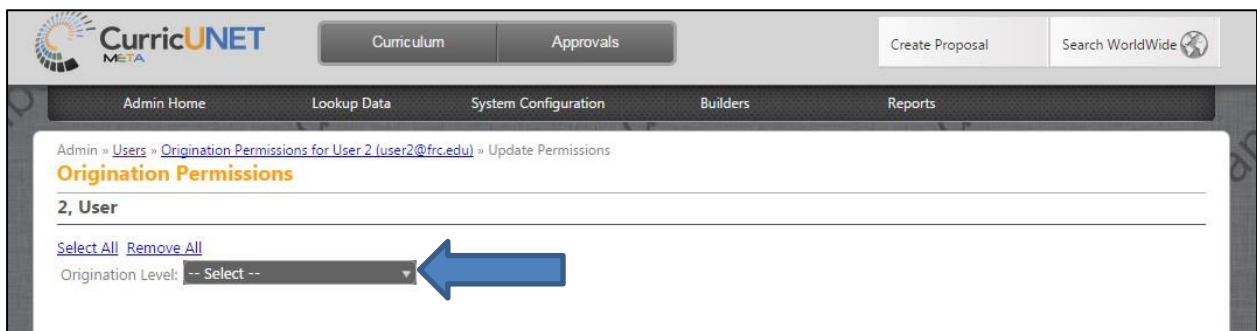
| | First Name | Last Name | Title | Business Phone | Business Phone Extention | Email |
|--|------------|-----------|-------|----------------|--------------------------|---------------|
| | Admin | Admin | | | | admin@frc.edu |
| | User | 1 | | | | user1@frc.edu |
| | User | 2 | | | | user2@frc.edu |

To view or edit originator functions, press on the orange “O” icon next to the user’s name.



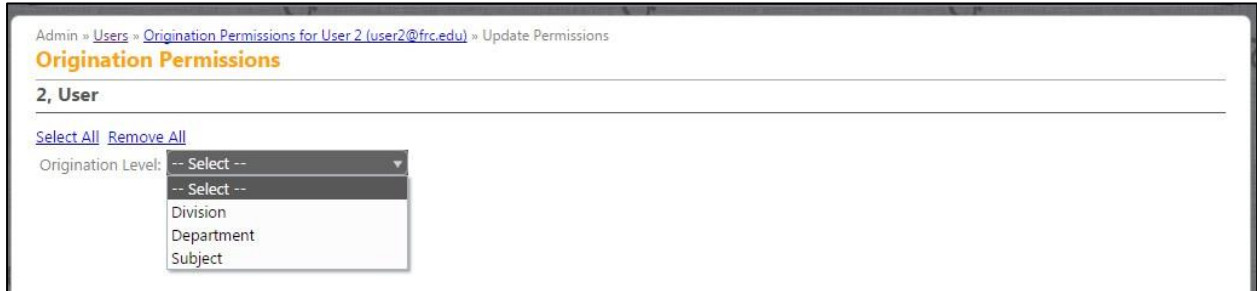
The screenshot shows the 'Origination Permissions' page for User 2. The page title is '2, User'. Below the title, there is a section for 'Organization Tier' with a dropdown menu set to 'Selected'. The main content area is empty with the text 'No records to display.' A blue arrow points to the 'Modify Permissions' button at the bottom of the page.

To edit origination rights push on the “Modify Permissions” button.

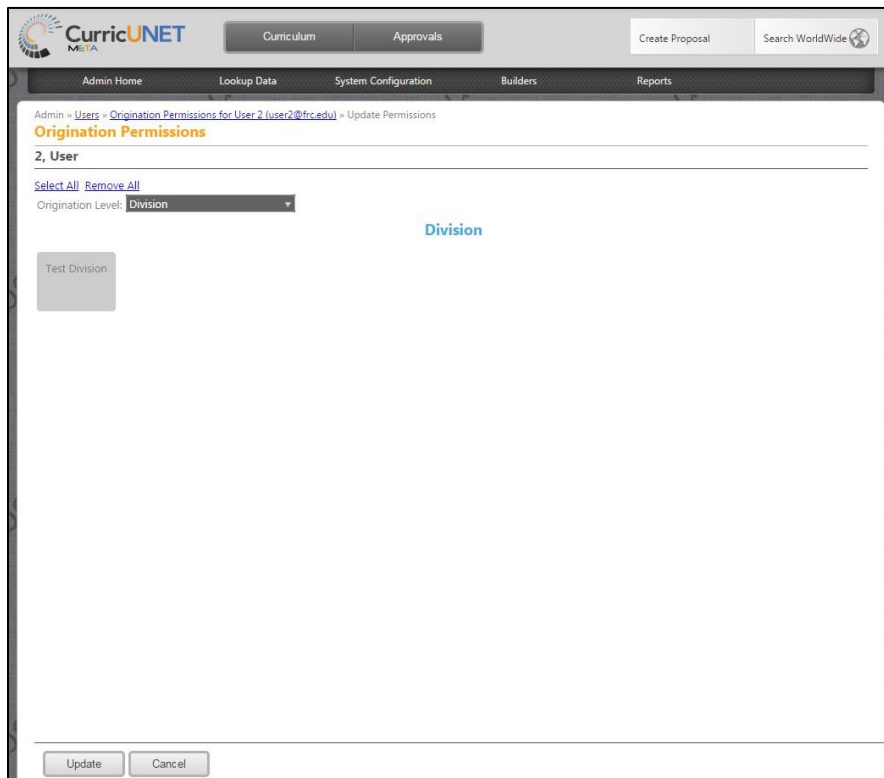


The screenshot shows the 'Update Permissions' page for User 2. The page title is '2, User'. Below the title, there are links for 'Select All' and 'Remove All'. The 'Origination Level' dropdown menu is set to '-- Select --'. A blue arrow points to the right side of the dropdown menu.

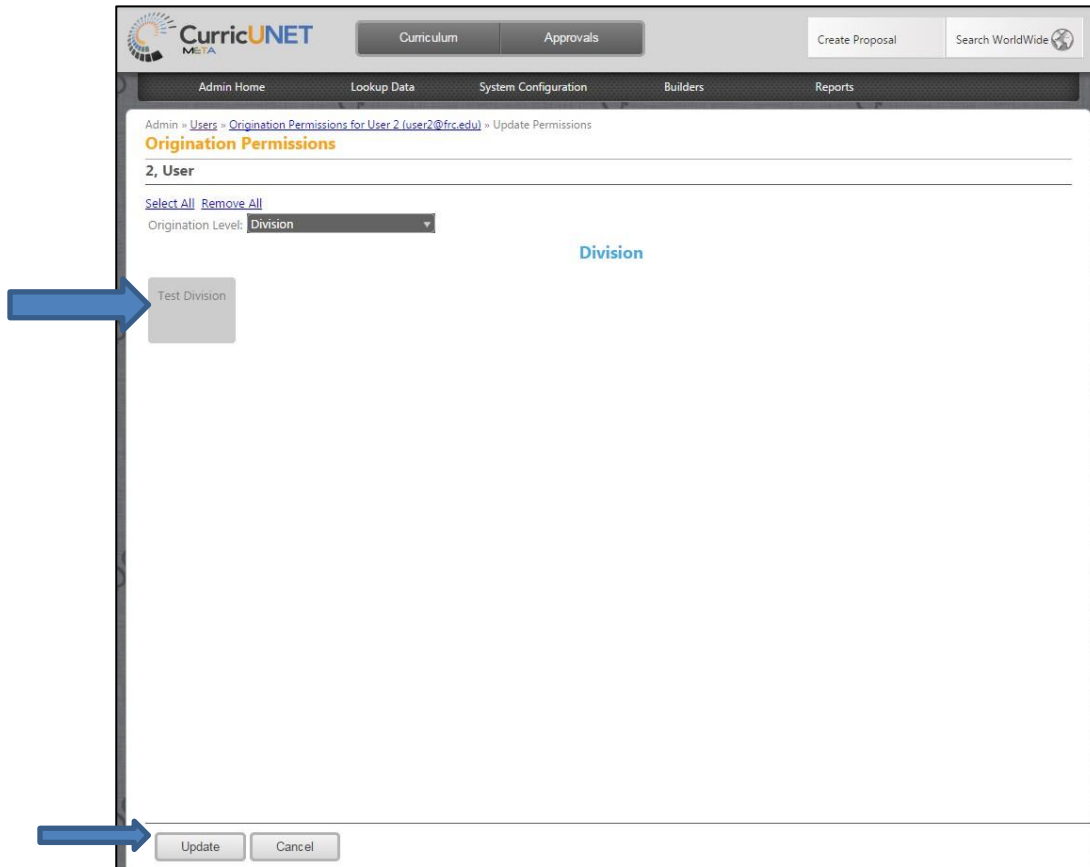
Push on the right side of the box to open the drop down.



Make a selection in the drop down menu as to which area you want this user to have origination rights. In this example you can choose from Division, Department, or Subject.

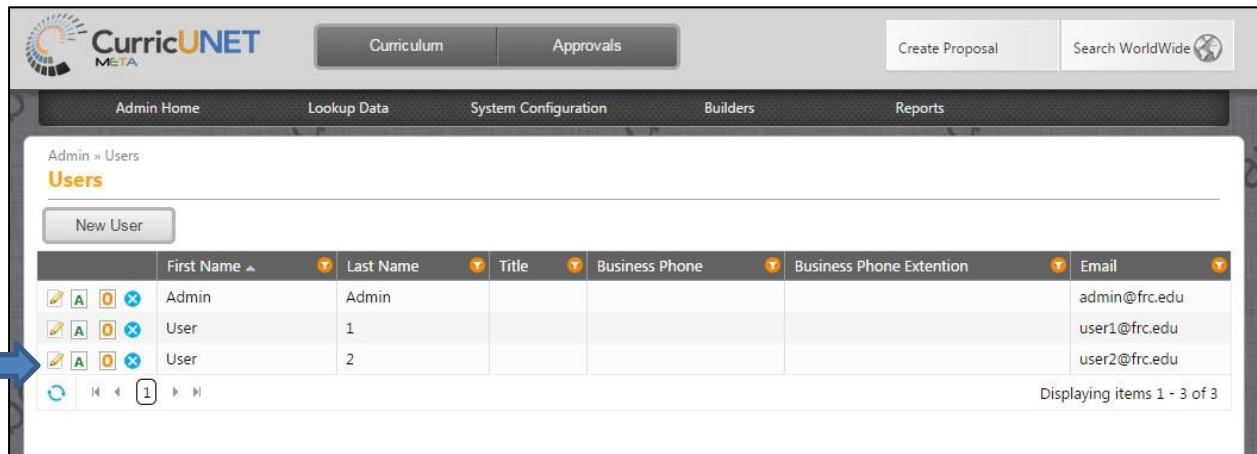


In this example "Division" is selected.



Press on the areas that you want the user to have origination permissions in. If the areas are selected, they will turn a darker grey. When done making selections, press “Update”.

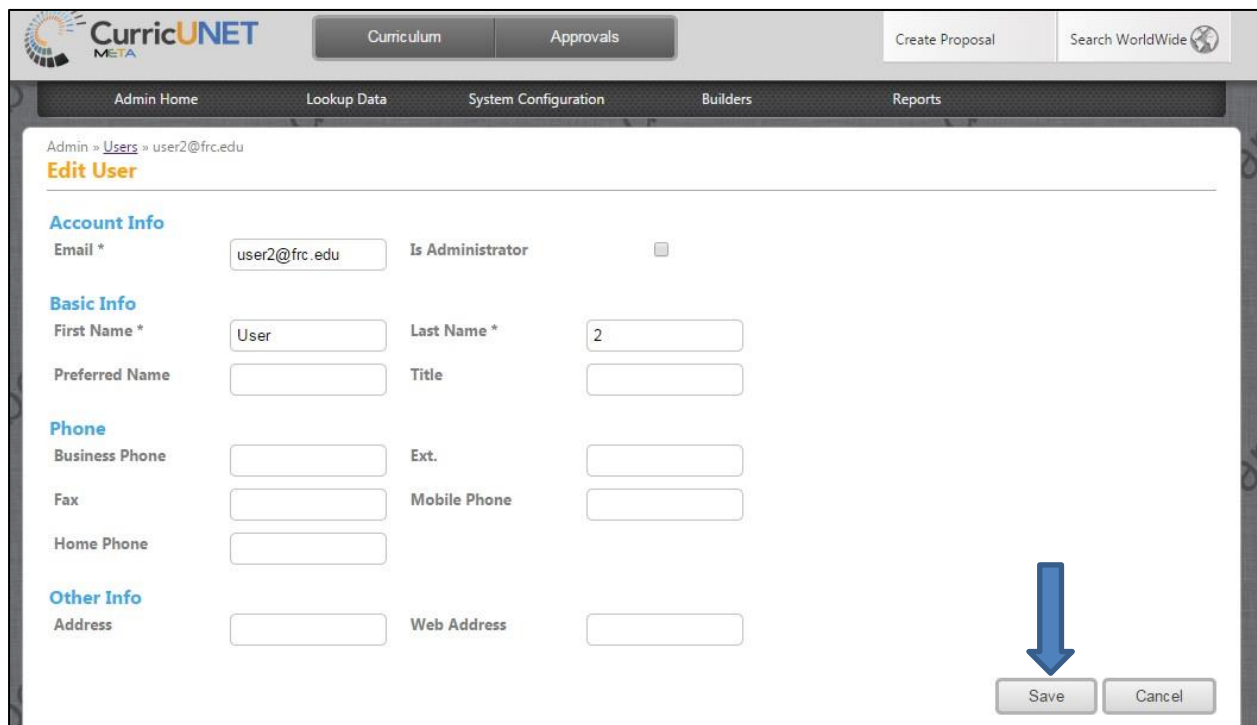
Edit a User



The screenshot shows the CurricUNET interface with the 'Users' page selected. A table lists three users. A blue arrow points to the pencil icon in the first column of the second row (User 1).

| | First Name | Last Name | Title | Business Phone | Business Phone Extension | Email |
|--|------------|-----------|-------|----------------|--------------------------|---------------|
| | Admin | Admin | | | | admin@frc.edu |
| | User | 1 | | | | user1@frc.edu |
| | User | 2 | | | | user2@frc.edu |

To edit a user's information, press on the pencil icon to the left of their name.



The screenshot shows the 'Edit User' form for user2@frc.edu. The form has several sections: Account Info, Basic Info, Phone, and Other Info. A blue arrow points to the 'Save' button at the bottom right.

Account Info

Email * Is Administrator

Basic Info

First Name * Last Name *

Preferred Name Title

Phone

Business Phone Ext.

Fax Mobile Phone

Home Phone

Other Info

Address Web Address

Here you can make changes to a user's name, email, password, etc. After you have entered all desired information, press the "Save" button.

CurricUNET META

Curriculum Approvals

Create Proposal Search WorldWide

Admin Home Lookup Data System Configuration Builders Reports

Admin > Users

Users

New User

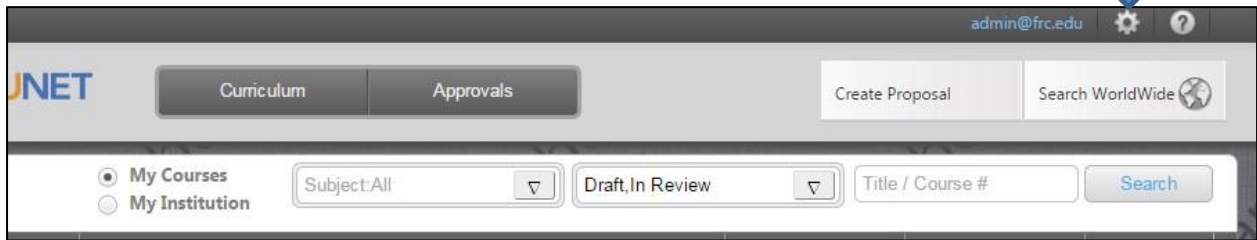
| | First Name | Last Name | Title | Business Phone | Business Phone Extention | Email |
|--|------------|-----------|-------|----------------|--------------------------|---------------|
| | Admin | Admin | | | | admin@frc.edu |
| | User | 1 | | | | user1@frc.edu |
| | User | 2 | | | | user2@frc.edu |

Displaying items 1 - 3 of 3

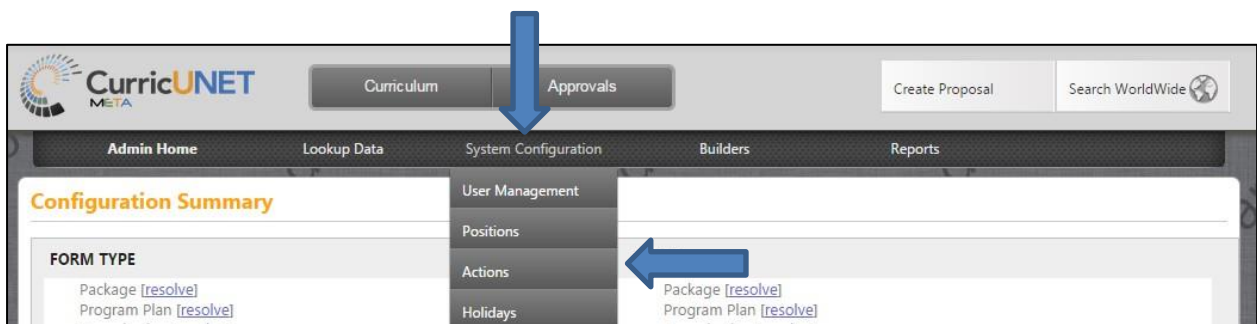
To deactivate a user, press on the blue “x” to the left of their name after you have removed them from all of their Approval positions.

****Important-** In order for a user to be removed from the system properly you must first press on the “A” and delete any approval permissions they may have **before** you delete them as a user. If you do not first remove their permissions they will still show up as being a part of that position even if they are no longer active in the system.

Managing Actions



To access the page that manages user actions, start by pressing on the gear symbol in the upper right part of the screen. Select “Administer Site” from the gear drop down.



Then press on “System Configuration” option in the middle of the screen. From this drop down select “Actions”.

Examples of Actions:

Required: the position must take action in order for the proposal to move to next level. All levels must have at least one required position.

Optional: the position does not need to take action to move the proposal forward. This might be used by curriculum committee members while the committee chair is required.

Approved: this action will normally send the proposal to the next level

Request Change: this action will normally send the proposal back to the originator for changes.

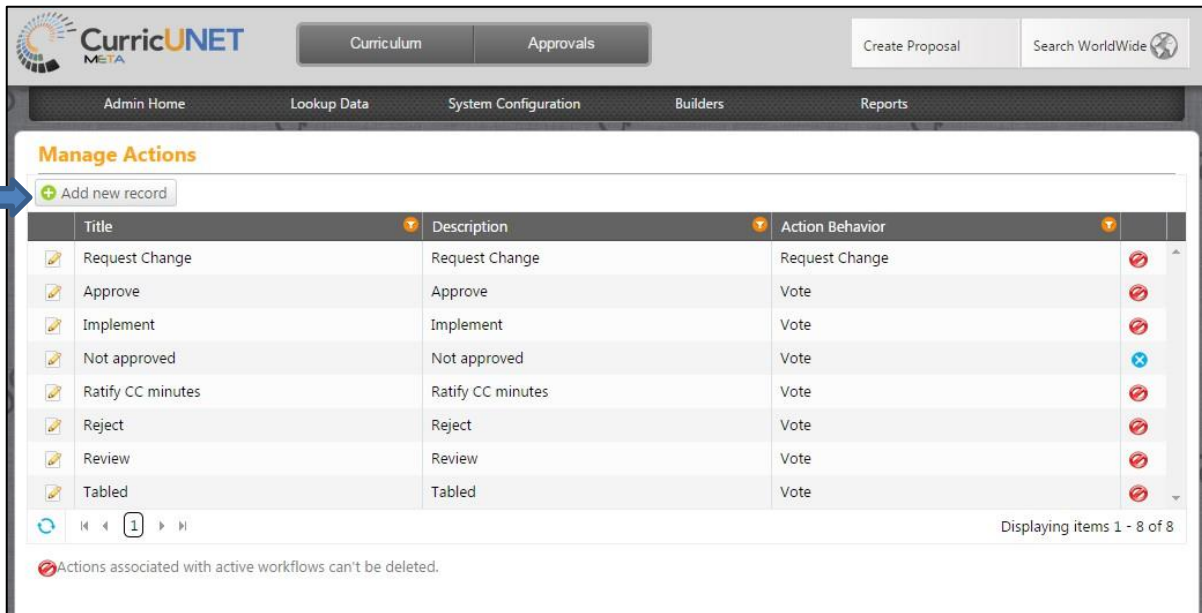
Implement: this action is normally on the final level in the approval process and completes the approval process.

Reject: this action normally completes the approval process and the proposal will no longer be in review status if this action is taken

Reviewed: this just means that the position has looked over the proposal

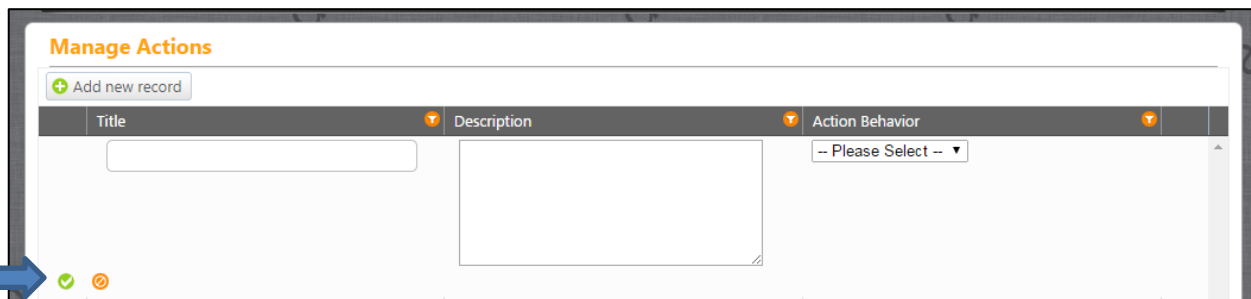
Tabled: this action can be taken by a committee to mark the proposal as something that they need to continue to look at

Add New Action



The screenshot shows the 'Manage Actions' page in the CurricUNET system. The page header includes the CurricUNET logo, navigation tabs for 'Curriculum' and 'Approvals', and buttons for 'Create Proposal' and 'Search WorldWide'. Below the header, there are navigation links for 'Admin Home', 'Lookup Data', 'System Configuration', 'Builders', and 'Reports'. The main content area is titled 'Manage Actions' and features a table with the following columns: Title, Description, and Action Behavior. The table contains 8 rows of actions, including 'Request Change', 'Approve', 'Implement', 'Not approved', 'Ratify CC minutes', 'Reject', 'Review', and 'Tabled'. A blue arrow points to the 'Add new record' button located at the top left of the table. At the bottom of the table, there is a pagination control showing '1' and a status message: 'Displaying items 1 - 8 of 8'. A note at the bottom left states: 'Actions associated with active workflows can't be deleted.'

This is an example of the main “Managing Actions” page. To add a new action, press the “Add new record” button.



The screenshot shows the 'Add new record' form in the 'Manage Actions' page. The form has three input fields: Title, Description, and Action Behavior (a dropdown menu). A blue arrow points to the green checkmark icon at the bottom left of the form.

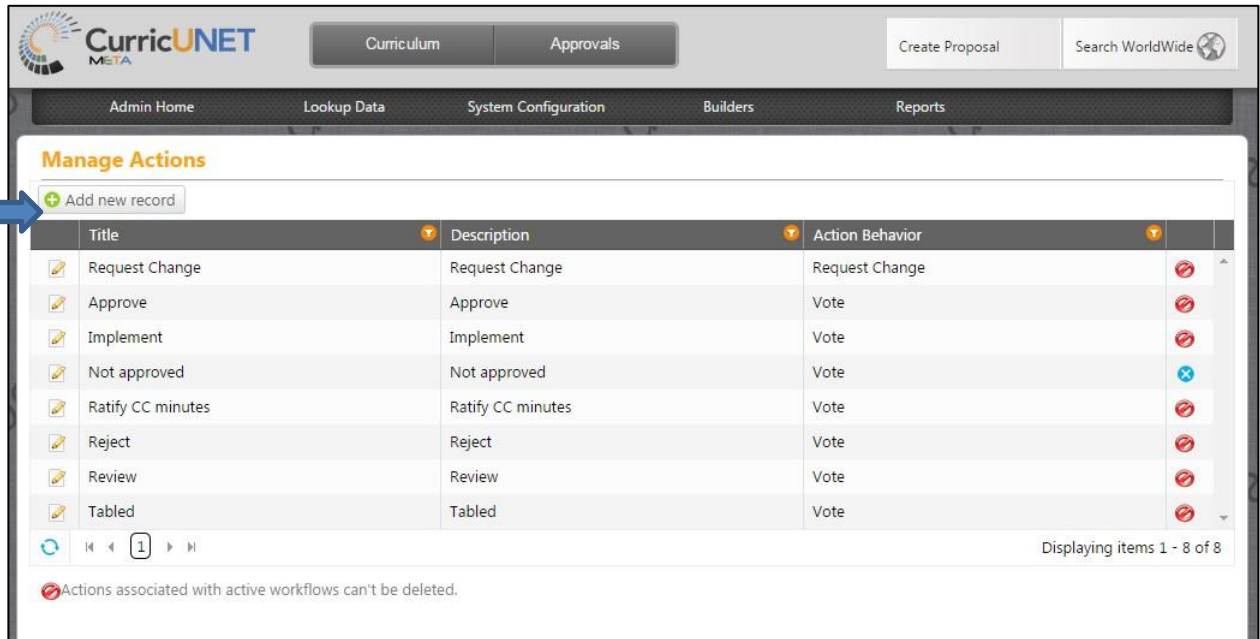
Here you can type in the new action title, description, and select action behavior from the drop down. Title is what the action is called.

Description is a short description of the action.

Action Behavior indicates if the action is to return to the proposal, to the originator, or to vote on the proposal.

Can Be Default Action indicate that the Action can be configured as Default Action in the workflow builder. When you have finished entering in desired information, press on the green check icon to save.

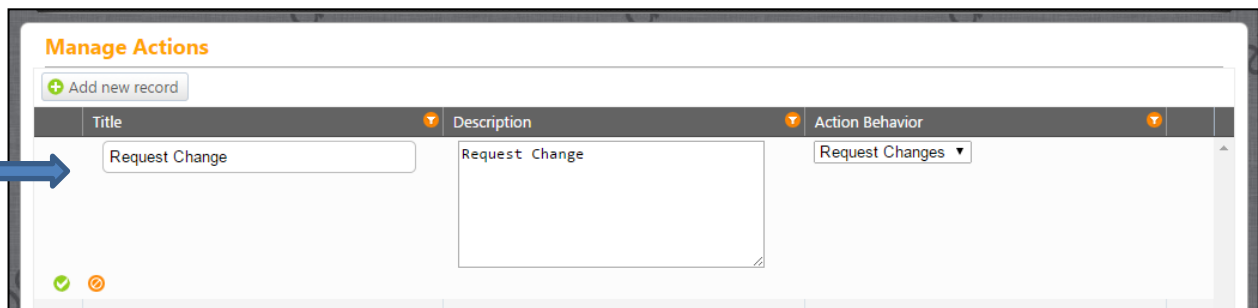
Editing Actions



The screenshot shows the CurricUNET interface with the 'Manage Actions' section. A blue arrow points to the 'Add new record' button. The table below lists various actions with their titles, descriptions, and behaviors. A note at the bottom states: 'Actions associated with active workflows can't be deleted.'

| Title | Description | Action Behavior |
|-------------------|-------------------|-----------------|
| Request Change | Request Change | Request Change |
| Approve | Approve | Vote |
| Implement | Implement | Vote |
| Not approved | Not approved | Vote |
| Ratify CC minutes | Ratify CC minutes | Vote |
| Reject | Reject | Vote |
| Review | Review | Vote |
| Tabled | Tabled | Vote |

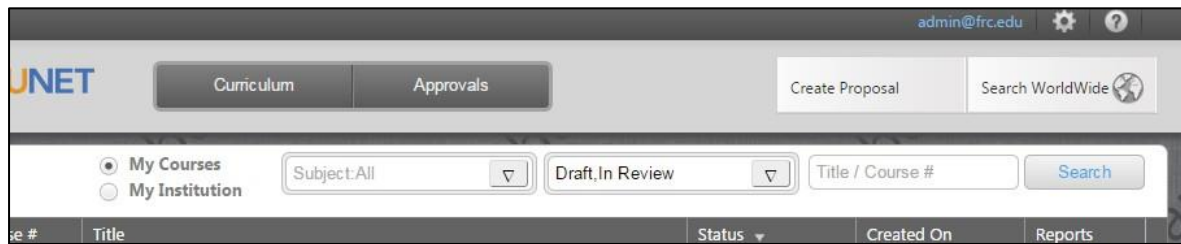
To edit an existing action, press on the pencil symbol to the left of the action title.



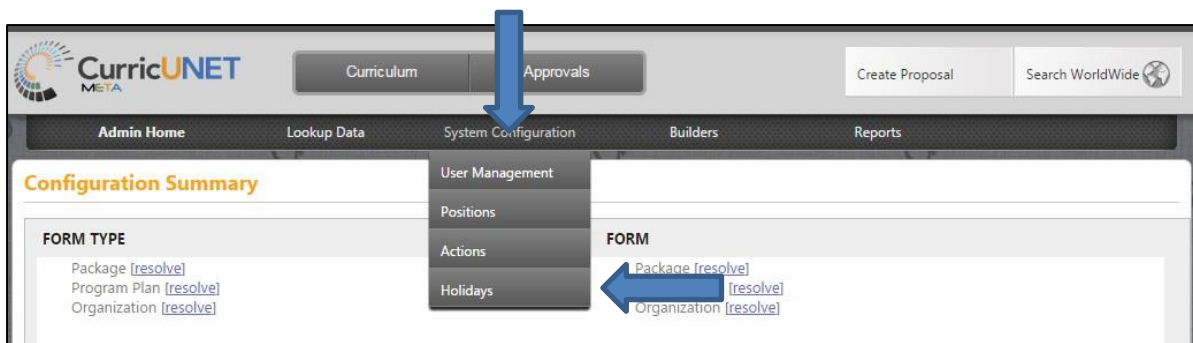
The screenshot shows the 'Manage Actions' section with the 'Request Change' action selected for editing. A blue arrow points to the pencil icon next to the title. The form fields are: Title (Request Change), Description (Request Change), and Action Behavior (Request Changes). A green checkmark icon is visible at the bottom left of the form.

Make desired changes. When finished with desired changes, press the green check icon to save.

Managing Institution Holidays



To get into the area to manage institutions holidays, start by pressing on the gear symbol in the upper right part of the screen. Select “Administer Site” from the gear drop down.



Then press on “System Configuration” option in the middle of the screen. From this drop down select “Holidays”.

Here you can see a list of your institutions recognized holidays. If you would like to add another holiday, press “Add new holiday”.

The screenshot shows the 'Add Holiday' form in the CurricUNET system. At the top, there is a navigation bar with 'Curriculum' and 'Approvals' tabs, and buttons for 'Create Proposal' and 'Search WorldWide'. Below this is a secondary navigation bar with 'Admin Home', 'Lookup Data', 'System Configuration', 'Builders', and 'Reports'. The main form area is titled 'Add Holiday' and contains a 'Holiday Name' input field. Below the input field is a 'Holiday Type' dropdown menu with the instruction 'Select the type of the holiday'. The dropdown menu is open, showing seven options with radio buttons and examples:

- Those that occur on the same month and same day each year.
E.g. Groundhog day is always on February 2nd.
- Those that always occur on a specific weekday with a specific week within a specific month.
E.g. Mothers' day is always the second Sunday in May.
- Those that always occur on the first weekday on or after a specified date.
E.g. Tax day is always the first weekday on or after April 15th.
- Those that always occur a specified number of days before or after another holiday.
E.g. Good Friday is always two days before Easter Sunday.
- Those that occur on a specified date but only on certain years.
E.g. In the United States, Inauguration day occurs on January 20 every four years.
- Those that occur on a specified weekday in the last full week of a specified month.
E.g. Administrative Professionals day occurs on the Wednesday of the last full week of April.
- Those that occur once on a specific date and don't repeat in other year
E.g.

At the bottom right of the form are 'Save' and 'Cancel' buttons.

From this screen you can type in the new holiday name at the top of the page.

The reason for having Holidays in the system is to have other days besides weekends that are not counted in the number of days that an approver has to review a proposal that is in review. The system has to option for a certain number of days to be set for reminder emails to be sent to an approver as well as having a certain number of days to be set before a proposal just moves past an approver.

CurricUNET META

Curriculum Approvals ² Create Proposal Search WorldWide

Admin Home Lookup Data System Configuration Builders Reports

Add Holiday

Holiday Name

Holiday Type
Select the type of the holiday.

Holiday Details

- Those that occur on the same month and same day each year.**
 E.g. Groundhog day is always on February 2nd.
- Those that always occur on a specific weekday with a specific week within a specific month.**
 E.g. Mothers' day is always the second Sunday in May.
- Those that always occur on the first weekday on or after a specified date.**
 E.g. Tax day is always the first weekday on or after April 15th.
- Those that always occur a specified number of days before or after another holiday.**
 E.g. Good Friday is always two days before Easter Sunday.
- Those that occur on a specified date but only on certain years.**
 E.g. In the United States, Inauguration day occurs on January 20 every four years.
- Those that occur on a specified weekday in the last full week of a specified month.**
 E.g. Administrative Professionals day occurs on the Wednesday of the last full week of April.
- Those that occur once on a specific date and don't repeat in other year**
 E.g.

Month: Day:

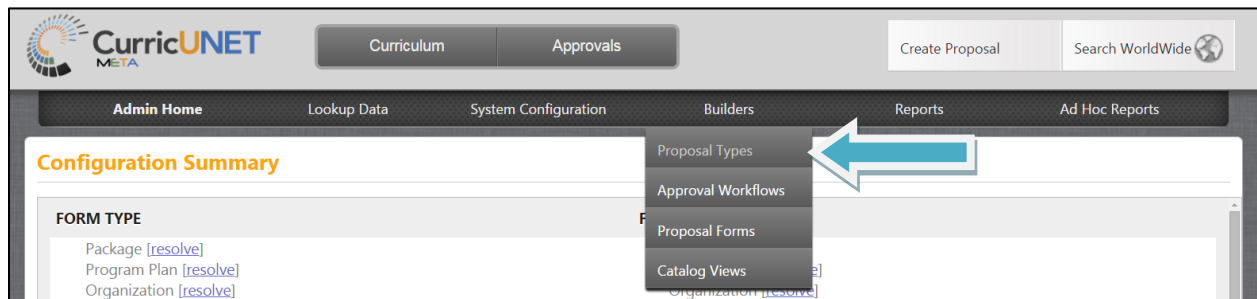
Save Cancel

Make the appropriate selection from the list of holiday types. Enter in the appropriate details and press "Save".

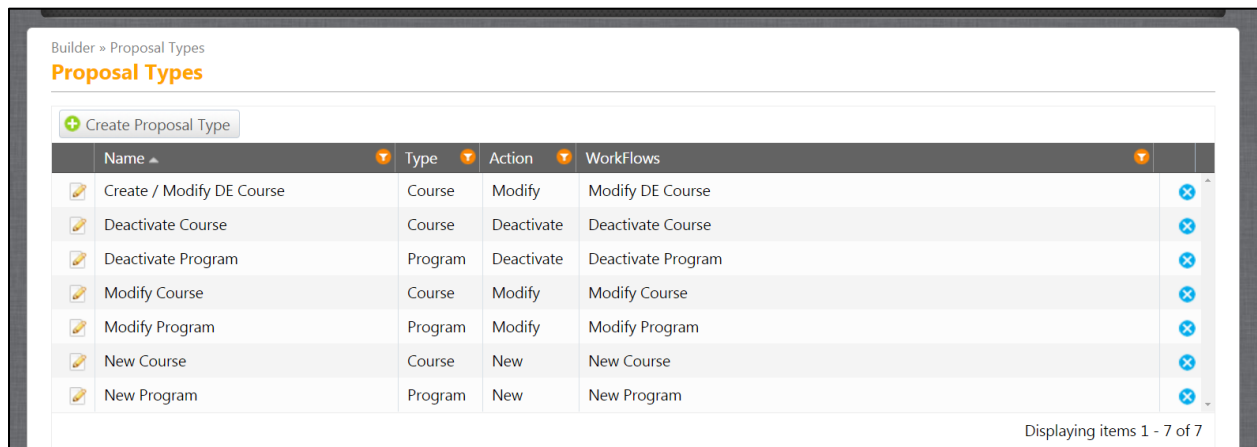
Managing Proposal Types



To get to the Proposal Types management area start by entering the Administrative area by selecting “Administrative” within the gear icon.



Then press on the “Builders” option. From this drop down select “Proposal Types”.



This is an example of what the Proposal Types area will look like. Here you are able to view what types and actions are associated with each proposal type, as well as view which workflows each of the proposal types go to.

Builder » Proposal Types

Proposal Types

[+ Create Proposal Type](#)

| Name | Type | Action | WorkFlows |
|---------------------------|---------|------------|--------------------|
| Create / Modify DE Course | Course | Modify | Modify DE Course |
| Deactivate Course | Course | Deactivate | Deactivate Course |
| Deactivate Program | Program | Deactivate | Deactivate Program |
| Modify Course | Course | Modify | Modify Course |
| Modify Program | Program | Modify | Modify Program |
| New Course | Course | New | New Course |
| New Program | Program | New | New Program |

Displaying items 1 - 7 of 7

****Important** – There is currently a bug with the edit proposal types feature so do not edit your proposal types it will cause issues in your system. If you have a need to edit please contact Governet support to do this action for you within the database.

You are able to create new Proposal types from the above area. Press on “Create Proposal Type”.

Admin Home Lookup Data System Configuration Builders Reports Ad Hoc Reports

Builder » Proposal Types

New Proposal Type

Title*

Curriculum Type*

Action*

Proposal Form*

Approval Workflow*

Type your new proposal type title into the “Title” text field. Next select the “Curriculum Type”. Next select the desired “Action”. The action determines what status a proposal will end up in after being created with the proposal type and completing the approval process. Select the “Proposal Form”. The proposal form determines which form this proposal type will be associated with. Lastly select the “Approval Workflow” that this proposal type will go through.

Builder » Proposal Types

New Proposal Type

Title*

Curriculum Type*

Action*

Proposal Form*

Approval Workflow*

Standard Reports

Standard reports are reports that can be used by all users. There are separate reports that can only be accessed by administrators, which will be covered later in this manual.

Course Reports

The screenshot shows the CurricUNET interface. At the top, there are tabs for 'Curriculum' and 'Approvals' (with a notification badge '2'). Below the tabs, there are filters for 'My Courses' and 'My Institution', a dropdown menu for course subjects (currently showing 'HSAGT, HSECN, HSENG'), and a dropdown for 'CURRENT'. A search bar is also present. The main content is a table with columns: Subject, Course #, Title, Status, Created On, and Reports. The table lists four courses: HSECN 10 - Economics, HSAGT 10 - American Government, HSENG 17 - Basic Skills: Reading and Study Strategies, and HSENG 40 - Integrated Information Literacy. A blue arrow points to a paper icon in the 'Reports' column for the first course, which has opened a dropdown menu with options 'Course Outline' and 'Impact'.

To view the standard course reports, push on the paper icon to the right of the course listing. Each course will have its own paper icon on the right side that when selected will run the report that is directly related to that particular course. When you push on the paper icon two course reports options may display, “Course Outline” and “Impact”.

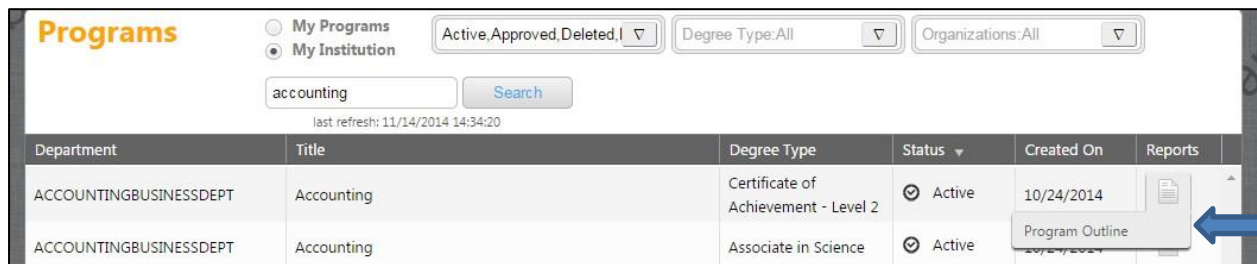
| City College of San Francisco Course Outline of Record | |
|---|---|
| I. GENERAL DESCRIPTION | |
| A. Approval Date | |
| B. Department | New Student Counseling |
| C. Course Number | AAPS 100 |
| D. Course Title | Achieving an Academic Attitude |
| E. Course Outline Originator | System Loaded |
| F. Department Chairperson | |
| G. Dean | |
| II. COURSE SPECIFICS | |
| A. Hours | Lecture: 3.00 total |
| B. Units | 3.00 |
| C. Pre-requisite | None |
| Corequisite | None |
| Co/Pri-Requisite | None |
| Advisory | None |
| D. Course Justification | The Counseling Department is offering a course to explore behavior patterns through self-evaluation related to areas of motivation, emotional intelligence, resilience, self-regulation, communication, planning and organization, conflict resolution and resource utilization. These related competencies will enable students to better manage the uncertainties associated with the college experience. Also meets CCSF GE Area D graduation requirement. |
| E. Field Trips | |
| F. Method of Grading | |
| G. Repeatability | |

This is an example of a “Course Outline” report. This report is a summary of the course proposal.


| |
|---|
| AAPS 100 - Achieving an Academic Attitude **CurricUNET Conversion** City College of San Francisco |
| Course Requisites |
| Cross Listed Courses |
| Programs |
| <small>Generated on: 10/30/2014 2:48:55 PM</small> |

This is an example of the “Impact” report. Items will be listed in each of the areas if the course selected is a requisite of another course, if it is cross listed with another course, or if it is a part of a program.

Program Report



The screenshot shows a web interface for 'Programs'. At the top, there are filters for 'My Programs' (selected) and 'My Institution', a status dropdown set to 'Active, Approved, Deleted, I', a 'Degree Type' dropdown set to 'All', and an 'Organizations' dropdown set to 'All'. A search bar contains the text 'accounting' and a 'Search' button. Below the search bar, it says 'last refresh: 11/14/2014 14:34:20'. The main table has columns: Department, Title, Degree Type, Status, Created On, and Reports. Two rows are visible, both for 'Accounting' programs. The 'Reports' column for the second row has a paper icon, which is highlighted by a blue arrow.

| Department | Title | Degree Type | Status | Created On | Reports |
|------------------------|------------|--------------------------------------|--------|------------|---|
| ACCOUNTINGBUSINESSDEPT | Accounting | Certificate of Achievement - Level 2 | Active | 10/24/2014 |  |
| ACCOUNTINGBUSINESSDEPT | Accounting | Associate in Science | Active | | Program Outline |

To view the standard program report press on the paper icon to the right of the program listing. Each program will have its own paper icon on the right side that when selected will run the report that is directly related to that particular program. When you push on the paper icon the “Program Report” link will display.

Press “Program Report”.

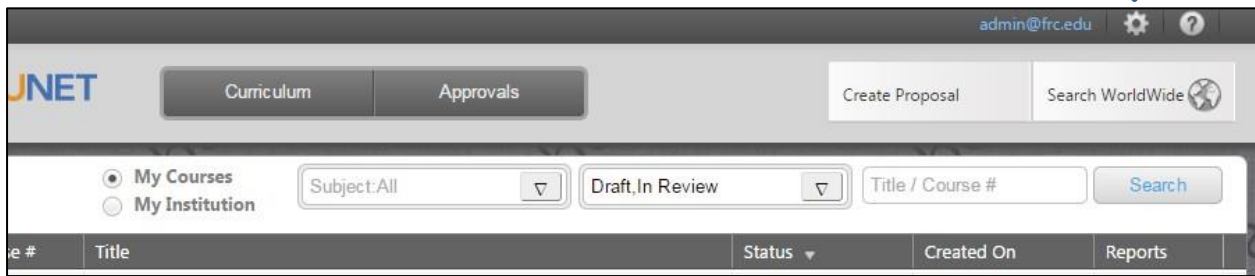
Accounting Bachelor of Business Administration

Description

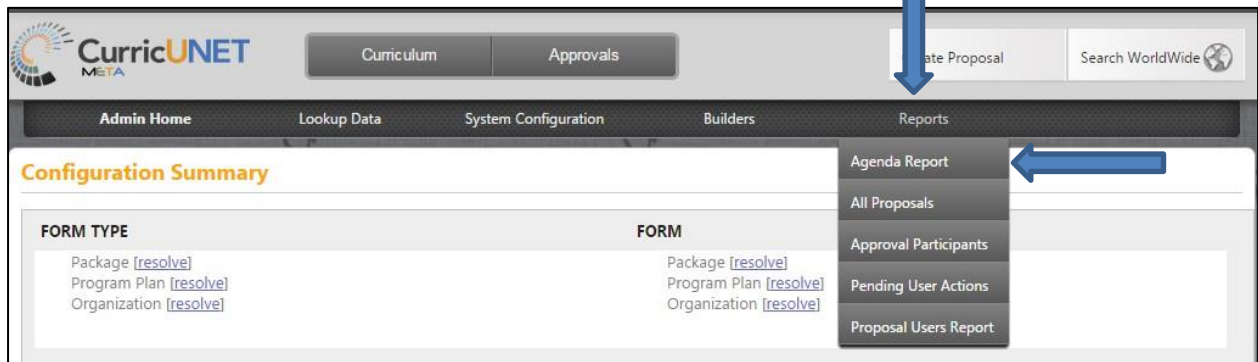
The undergraduate business programs are designed to prepare students for careers in many different organizations where business skills are needed including private businesses and corporations, non-profit organizations, and government at all levels. The undergraduate majors allow students to become the functional specialists needed in all organizations. Students can specialize in accounting, finance, general business, management, information systems or marketing. Courses are also available to build skills for students wishing to start their own business. The available business minors allow students to broaden their marketable skills.

This is an example of a Program Report.

Administrative Reports



To get to the User Administration area, push on the gear icon on the top right of the screen and select “Administer Site”.



To view the list of administrative reports press on “Reports”.

When you press on “Reports” a drop down list will appear. The items on this drop down are Agenda Report, All Proposals, Approval Participants, Pending User Actions, and Proposal User Report. Make your selection from the drop down.

Agenda Report

Curriculum Approvals 5

Create Proposal Search WorldWide

Admin Home Lookup Data System Configuration Builders Reports

Agenda Report

Position: Curriculum Commission Chair

Courses [Check All / Clear](#)

| Id | Title | Included in Package | Proposal Type |
|--------------------------|--|---------------------|---------------------|
| <input type="checkbox"/> | ABE 20 Beginning ABE I | | Course Revision |
| <input type="checkbox"/> | ABE 21 Beginning ABE II | | Course Revision |
| <input type="checkbox"/> | ABE 41 Advanced ABE II | | Course Revision |
| <input type="checkbox"/> | ENG 90 ESL/Academic Purposes Adv I | | Course Deactivation |
| <input type="checkbox"/> | ENG 93 ESL Academic Purposes Adv IV | | Course Deactivation |
| <input type="checkbox"/> | HUM 124 International/Regional Studies | | Course Deactivation |
| <input type="checkbox"/> | PCHI 2 Food and Culture in China | | New Course |

Programs [Check All / Clear](#)

| Id | Title | Award Title | Included in Package | Proposal Type |
|--------------------------|---|-------------|---------------------|-----------------------------|
| <input type="checkbox"/> | Computer Forensics AAS 22CU | | | Certificate/Degree Revision |
| <input type="checkbox"/> | Surveying and Civil Technology Certificate 24VF | | | Certificate/Degree Revision |
| <input type="checkbox"/> | Web Programming AAS 22CJ | | | Certificate/Degree Revision |

[Run Report](#)

After you have selected “Agenda Report” on the reports drop down, you will come to this screen. Here you can select the agenda position that you would like to view. Select the course or program you want to view in the report. Press “Run Report”. This report shows which courses and programs that need to be discussed and which are pending approval for the selected position.

Curriculum Commission Chair Agenda Report
December 9, 2014

Call to Order

Approval of Agenda

Approval of Summary of Minutes

Course Approvals

Course Revision

ABE 20 Beginning ABE I (Spring 2011)

Units 3.00

Description

This course is an individualized program of instruction for students with emerging reading, writing, language, arithmetic and life skills development. Students will progress and master the basic skills at their own rate. Students' needs determine level and kinds of materials used.

Recommended

Must be placed into class using a mandatory assessment (e.g. TABE 2.0 - 3.9) OR consent of instructor or department chair.

Program Approvals

New Business

Old Business

Future Agenda

Adjournment

This is an example of an Agenda Report.

All Proposals

Courses

ACC 99: Train

Proposal Type: New Course

Originator:

Status: In Review

Launch Date: 10/10/2014 8:23 AM

ADE 456: test 11/26

Proposal Type: New Course

Originator:

Status: In Review

Launch Date: 11/26/2014 12:59 PM

ALE test: test

Proposal Type: New Course

Originator:

Status: In Review

Launch Date: 11/26/2014 12:46 PM

After you have selected “All Proposals” on the reports drop down you will come to this screen. This is an example of an “All Proposals” report.

Approval Participants Report

Process **Create New Course** ▼
Subject **(TEST) Example Subject Code** ▼

After you have selected “Approval Participants Report” on the reports drop down you will come to this screen. The Approval Participants Report shows you all of the users for the workflow process for each level. You have options to select from in the “Process” drop down. You also select the desired subject to view by making a selection from the “Subject” drop down menu.

Process **Create New Course** ▼
Subject **(TEST) Example Subject Code** ▼

Level: 01(Originator)
Launch (Required: Yes)
Admin, Admin (admin@frc.edu)

Level: 02
No Users Assigned

Level: 03
No Users Assigned

Level: 04
No Users Assigned

Level: 05
Curriculum Chair (Required: yes)
1, User (user1@frc.edu)

Level: 06
No Users Assigned

Level: 07
No Users Assigned

Level: 08
No Users Assigned

This is an example of the Approval Participants Report. This shows all of the users assigned for each level when the selected subject has a new proposal in review.

Pending User Actions Report

| | |
|--|----------------------|
| Proposal (HSAGT 99) This is a training title ▼ | View |
|--|----------------------|

This report shows the administrator for whom a course or program that is in the workflow process is waiting on. Open up the drop down menu and select a course or program to view.

Proposal Users Report

Proposal (HSAGT 99) This is a training title

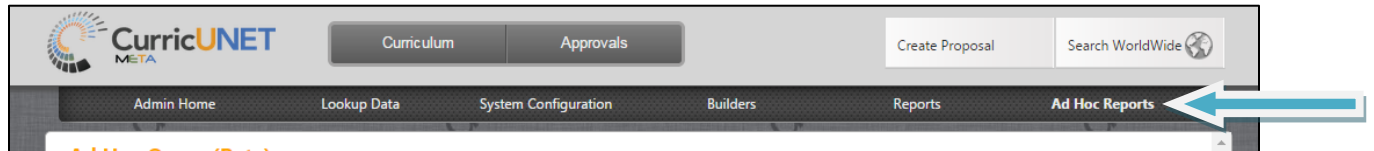
After you have selected “Proposer Users Report” on the reports drop down you will come to this screen. From the drop down select which course or program proposal that you would like to view and press “View”.

| HSAGT 99: This is a training title -- New Non Credit Course | |
|---|---|
| Level: 1 | |
| Position | User(s) |
| Originator | , |
| Level: 2 | |
| Position | User(s) |
| Tech Writer | , Dudley, Cindy |
| Level: 3 | |
| Position | User(s) |
| Department Chair | , Ramirez, Freddy |
| Level: 4 | |
| Position | User(s) |
| Instruction Review | Lopez, Maria |
| Level: 5 | |
| Position | User(s) |
| Dean | , Schaper, Nikki |
| Level: 6 | |
| Position | User(s) |
| Tech Review Admin | , Partlow, Gwen |
| Technical Review Member | NO USER FOUND |
| Level: 7 | |
| Position | User(s) |
| CPCC Review Admin/Chair | , Partlow, Gwen |
| CPCC Members Team A | Avery, Peter Julius, Jim Ongyod, Anthony Peters, Erika |
| CPCC Members Team B | Fairleigh, Megan Layton, Andrew Meinhold, Gail Rosen, Roberta Taccone, Al |
| CPCC Members Team C | Ali, Shafin Benschop, Joanne Lloyd Jones, Melissa Cristofolini, Andrea |

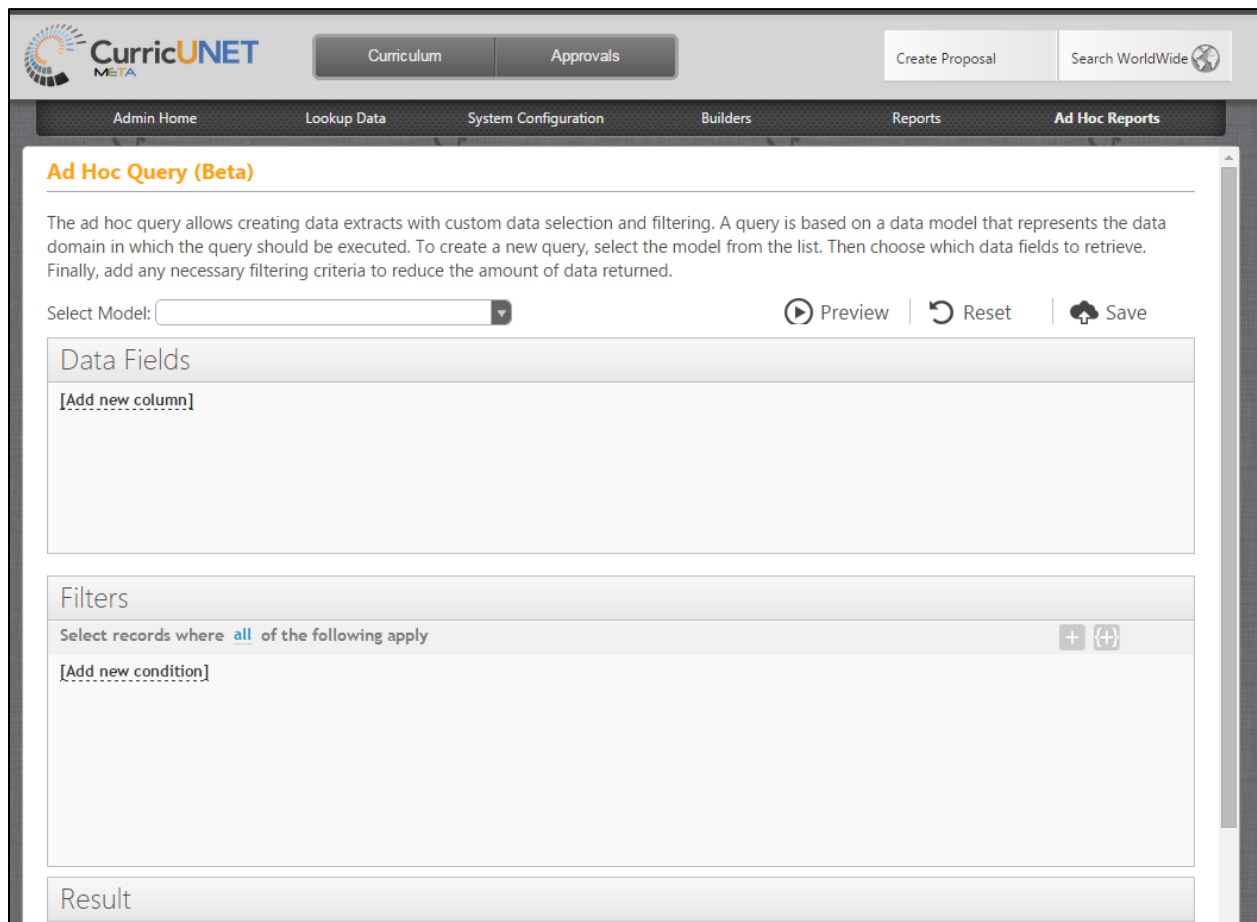
This is an example of a Proposer User Report display. This shows all the levels of the workflow and the users assigned to each level for the type of subject that you are viewing.

Ad Hoc Reports

To get into the Ad Hoc reporting feature you select “Ad Hoc Reports” from the main administrator area.

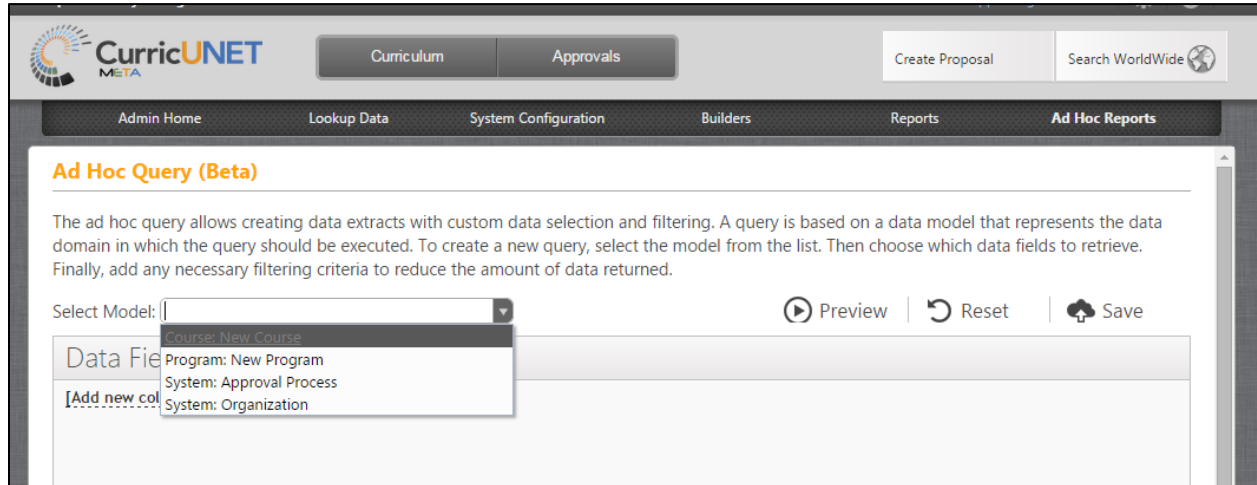


After you have selected **Ad Hoc Reports** you will come to this screen. Please note that the screen is titled “Ad Hoc Query (Beta)”. This means that this tool is only currently in the Beta state and development and fine tuning are still in process. We will continue to develop and expand the capabilities of this feature. (You may need to use trial and error with selecting fields, and then previewing the results, until you find the exact field with the Beta version)

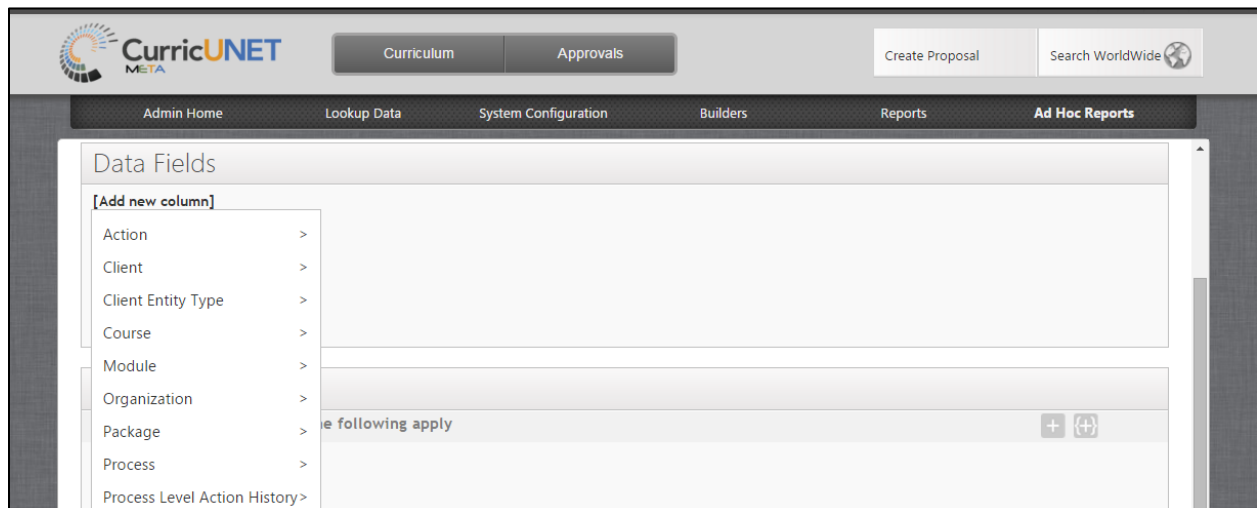


To start making an Ad Hoc report you will need to make a selection from the “Select Model” field.

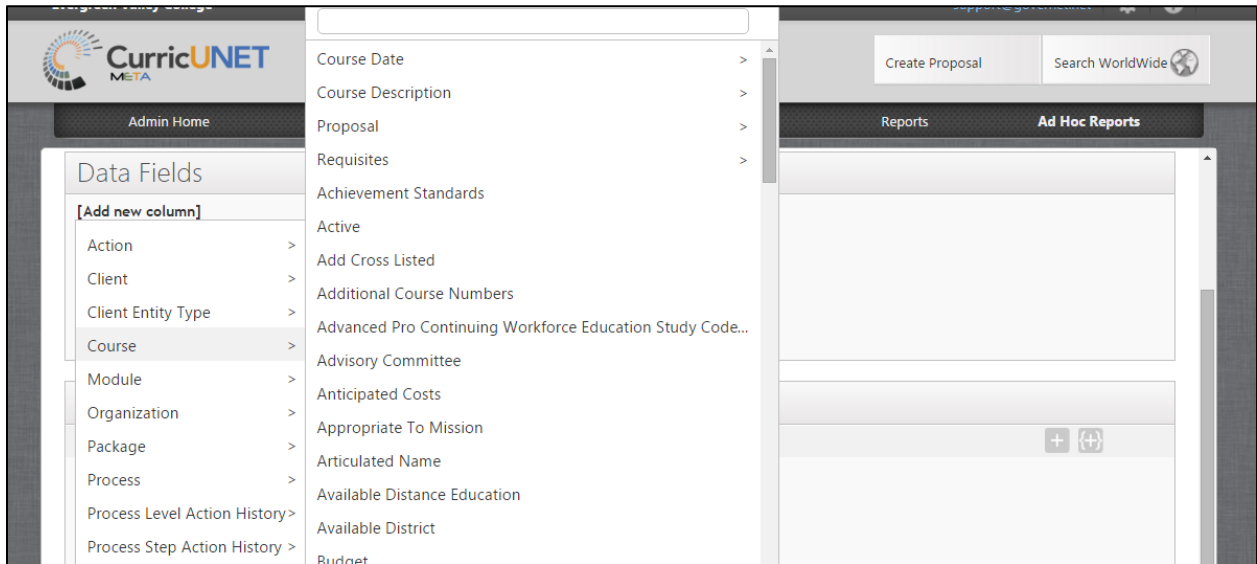
The area that you will want to use for the time being is the Model called “System: Approval Process”. This one has the most development done on it so far and will be able to pull data from courses, programs, approval process, users.



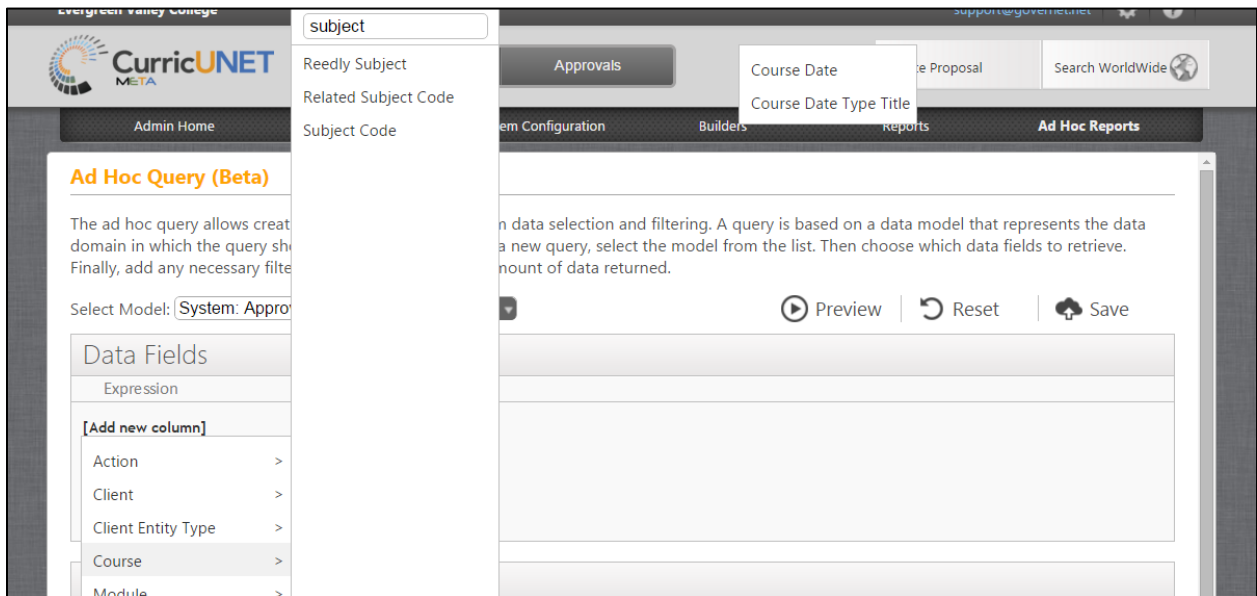
After you have selected the “System: Approval Process” Model you can select the Data Fields that you would like to report on. Data areas are organized into sections within the first level drop down that appears. Press “Add new column”. Groupings include such data sections as; Course, Program, Process, Step, and User.



To select data pieces to build into your report query hover over a section and more field details will appear.



You can either scroll up and down the list or type in the data field that you are looking for. In the example below the word “subject” is searched.



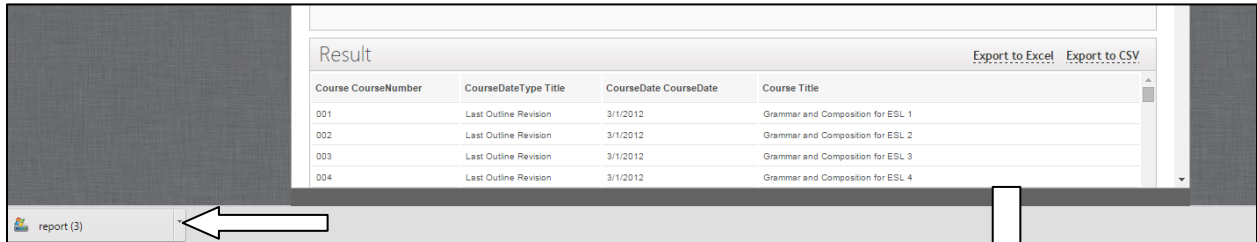
Select all of the data points that you need to report out for this report. They will appear in blue in the Data Fields area. You make the same types of selections in the Filter section if you need to have a filter on your search results. After you have selected all needed data points press “Preview”. Below is an example of search query after “Preview has been selected”.

The screenshot shows the 'Ad Hoc Query (Beta)' interface in CurricUNET. The 'Data Fields' section lists several fields, with 'Course Subject Code', 'Course Course Number', and 'Course Title' highlighted in blue. The 'Filters' section is empty. The 'Result' table displays two rows of data.

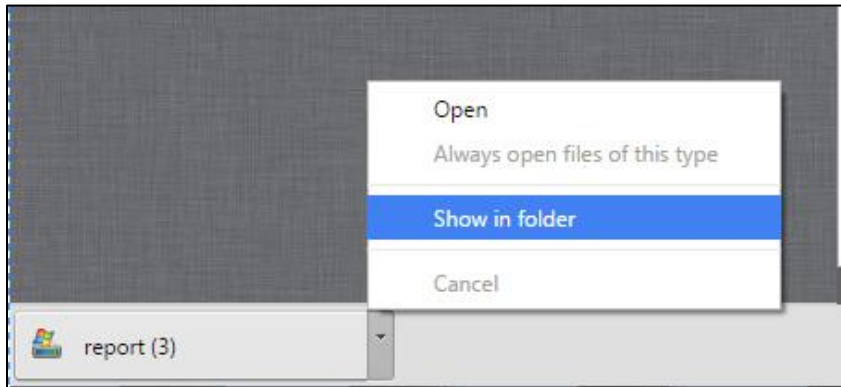
| Course Subject Code | Course Course Number | Course Title | Course Status Alias Title | Course_Proposal Implement Date | Course Specify Trans Req | Course CSU General Education Area |
|---------------------|----------------------|--------------------|---------------------------|--------------------------------|--------------------------|-----------------------------------|
| AJ | 28 | test course 2/8/16 | Active | 2/16/2016 | null | null |
| AJ | 28 | test course 2/8/16 | Draft | 2/16/2016 | null | null |

To View the Ad Hoc Report in Excel select “Export to Excel”.

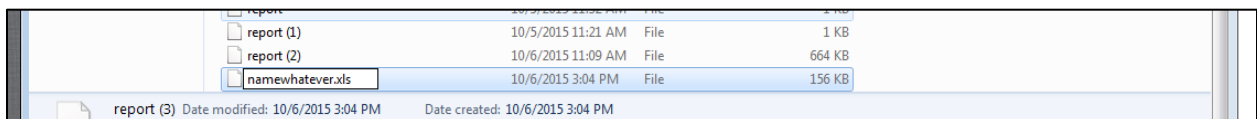
A “report” file should download and show up on the bottom of your screen. (In the future it will immediately be as an excel file, but for now you will need to follow these additional steps.)



Click on the little arrow on the download and select “Show in folder”.



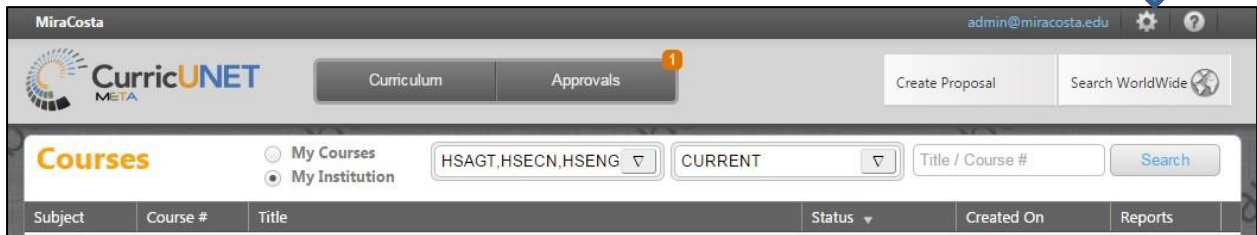
Right click the file (which at first are named report) and select “Rename”. Rename the file to what you would like to call it and make sure it ends in “.xls”.



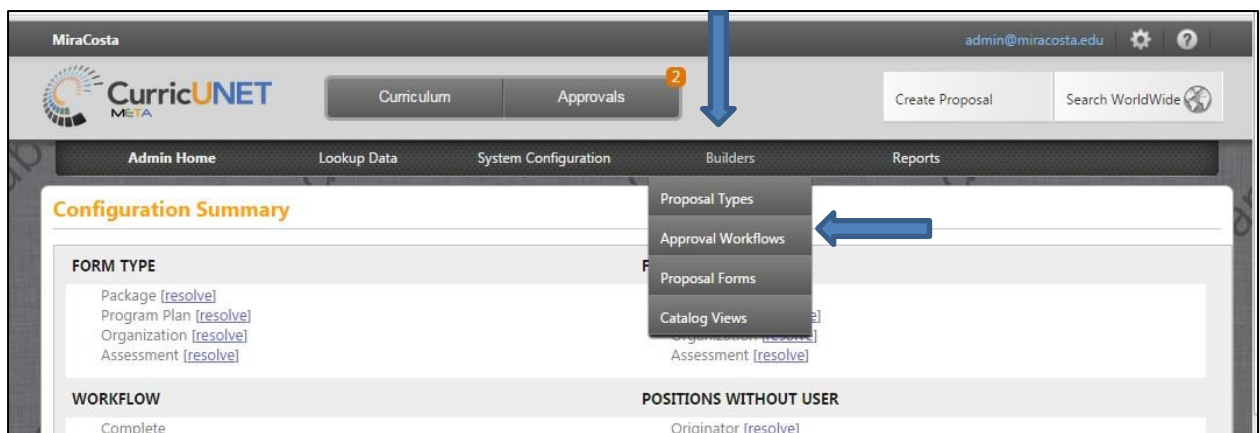
After you have renamed it you can double click on it and open it. It will now display as an excel file.

| | A | B | C | D |
|----|----------------------------|---------------------------------------|-----------------------|-----------------------|
| 1 | Course CourseNum ber | Course Title | CourseDateType Title | CourseDate CourseDate |
| 2 | 220 | Digital Instrumentation Measurements | Last Outline Revision | 5/1/1990 0:00 |
| 3 | 240 | Digital Logic Circuits | Last Outline Revision | 5/1/1990 0:00 |
| 4 | 120 | Beginning Harmony I | Last Outline Revision | 5/21/1990 0:00 |
| 5 | 202 | Hist & Literature of Music II | Last Outline Revision | 5/21/1990 0:00 |
| 6 | 282 | Art Fundamentals for Education | Last Outline Revision | 2/1/1993 0:00 |
| 7 | 212 | The History & Appreciation of Dance | Last Outline Revision | 3/1/1995 0:00 |
| 8 | 100 | Introduction to Corrections | Last Outline Revision | 4/22/1999 0:00 |
| 9 | 220 | Introduction to Social Work | Last Outline Revision | 4/18/2002 0:00 |
| 10 | 280 | Career Preparation in the Visual Arts | Last Outline Revision | 4/3/2003 0:00 |
| 11 | 108 | Computer Accounting | Last Outline Revision | 11/26/2003 0:00 |
| 12 | 252 | Intermediate Voice II | Last Outline Revision | 4/29/2004 0:00 |
| 13 | 120 | Introduction to Counseling | Last Outline Revision | 5/1/2004 0:00 |
| 14 | 110 | Windows Operating System | Last Outline Revision | 8/1/2004 0:00 |

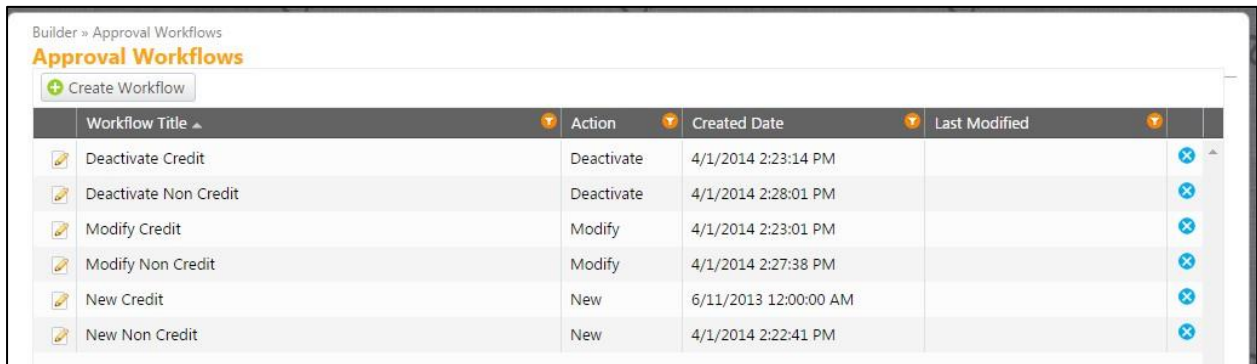
Workflow Management



To get to the User Administration area, push on the gear icon on the top right of the screen and select “Administer Site”.

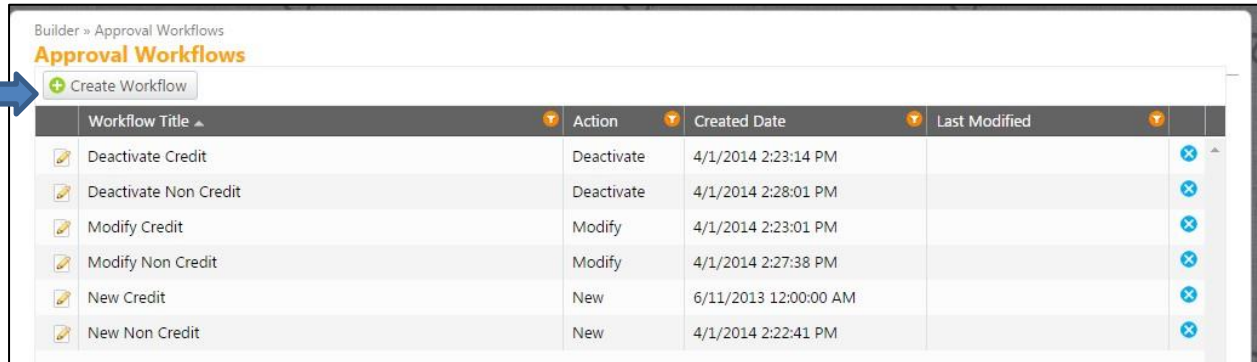


To get to the workflow area, press on “Builders” and select “Approval Workflows”.



This is the “Approval Workflows” page. From here you can create, edit, or deactivate the different types of workflows. Each of your institution’s proposal template types are listed here.

Creating a New Approval Process (Workflow)



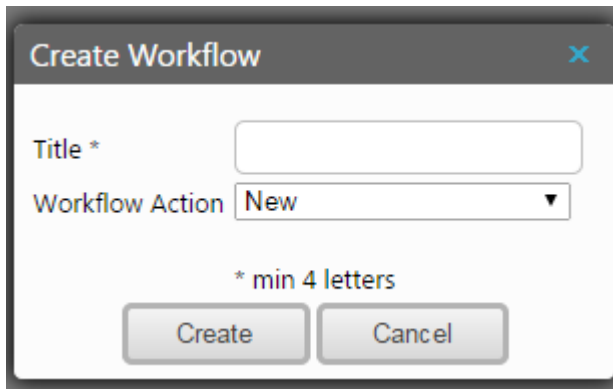
Builder » Approval Workflows

Approval Workflows

+ Create Workflow

| Workflow Title | Action | Created Date | Last Modified |
|-----------------------|------------|-----------------------|---------------|
| Deactivate Credit | Deactivate | 4/1/2014 2:23:14 PM | |
| Deactivate Non Credit | Deactivate | 4/1/2014 2:28:01 PM | |
| Modify Credit | Modify | 4/1/2014 2:23:01 PM | |
| Modify Non Credit | Modify | 4/1/2014 2:27:38 PM | |
| New Credit | New | 6/11/2013 12:00:00 AM | |
| New Non Credit | New | 4/1/2014 2:22:41 PM | |

To create a new workflow, push on the “Create Workflow” button.



Create Workflow

Title *

Workflow Action

* min 4 letters

Create Cancel

Here you enter the title, then you select a workflow action: new, modify, or deactivate. After entering desired information press “Create”.

MiraCosta admin@miracosta.edu

Curriculum Approvals 2

Create Proposal Search WorldWide

Admin Home Lookup Data System Configuration Builders Reports

Builder » Approval Workflows » Example

Approval Workflow

Workflow: Example

Drafts

Create Draft

| Version Title | Created Date | Last Modified Date |
|---------------|-----------------------|-----------------------|
| Example | 11/17/2014 1:49:04 PM | 11/17/2014 1:49:04 PM |

Displaying items 1 - 1 of 1

History

| Version Title | Created Date | Begin Date | End Date |
|------------------------|--------------|------------|----------|
| No records to display. | | | |

Displaying items 0 - 0 of 0

This is the page that will display the drafts and history of this particular workflow. To proceed in creating this new workflow, press on the pencil icon to the left of the “Version Title”.

Builder » Approval Workflows » Example » Example

Approval Workflow Builder

Process Title: Example

Version Title: Example

Activate Workflow Delete Draft

Design Surface

Level 01 (Originator)

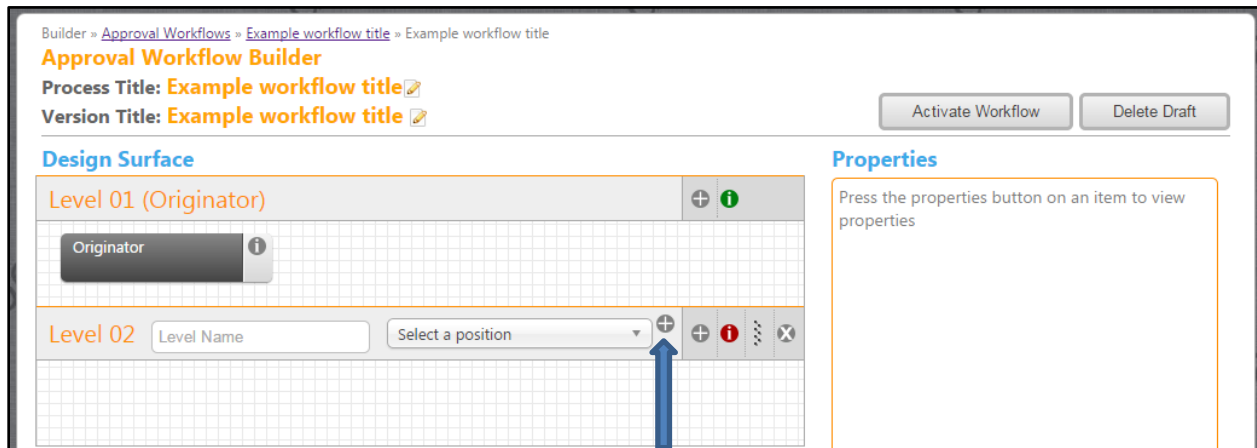
Originator

Level 02 Level Name Select a position

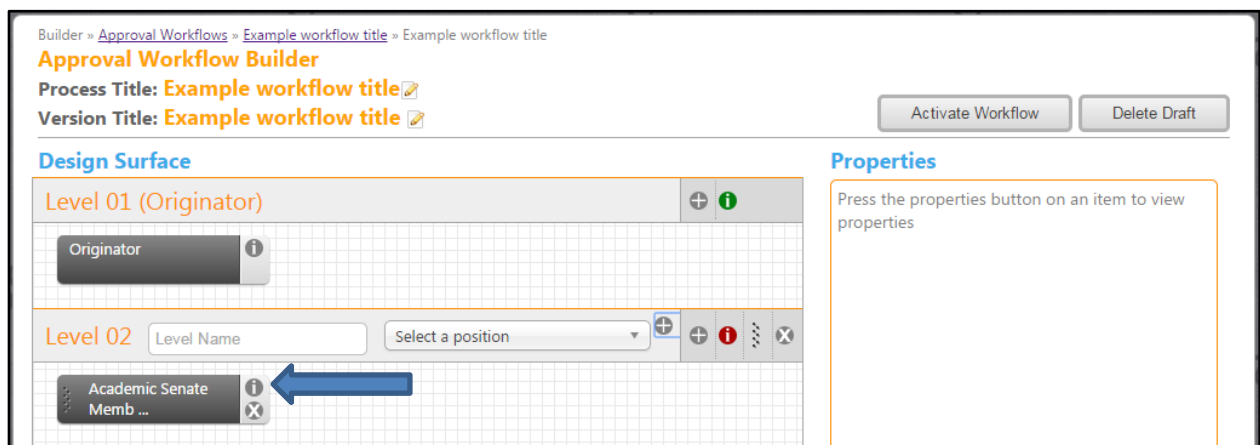
Properties

Press the properties button on an item to view properties

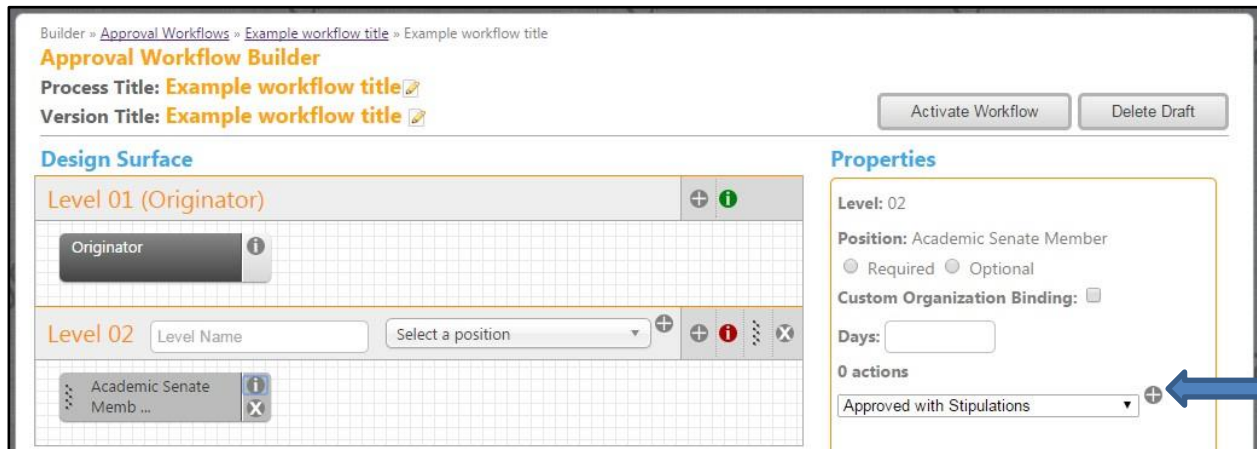
This is the workflow builder. The “Originator” step is already built in as “Level 1”. You will start by adding a “Level 2”. If you would like to name the levels, you can type in a name in the text box labeled “Level Name”. Please note that naming the levels is not required.



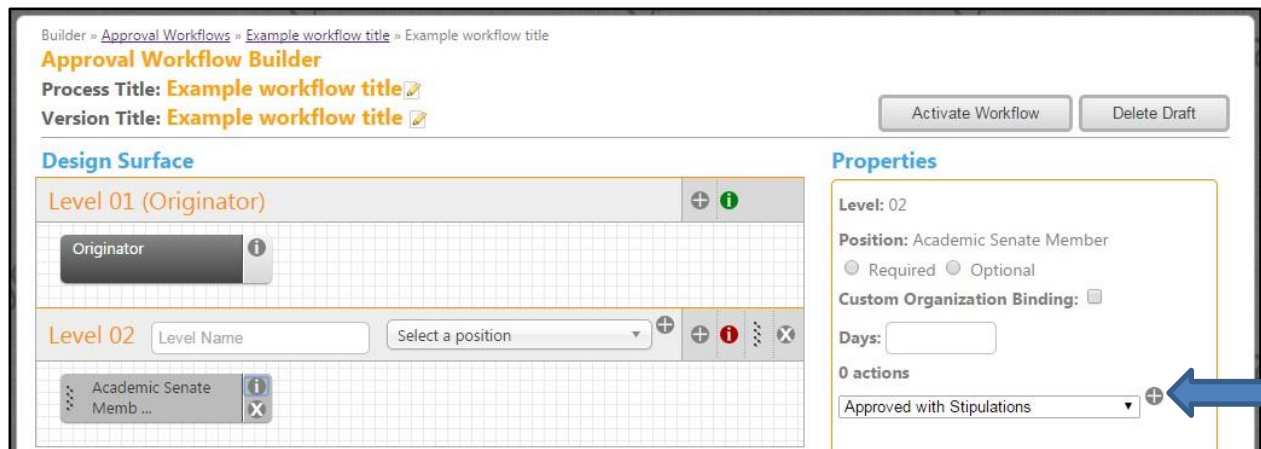
You need to select a position for the user that is associated with this level. Push on the “Select a position” box. A drop down will then display from which you can select the desired position for this level. This will be the first user/position that a proposal in this workflow will be sent to. After you have made a selection in the drop down, you have to push on the “+” icon that is directly to the right of the drop down box.



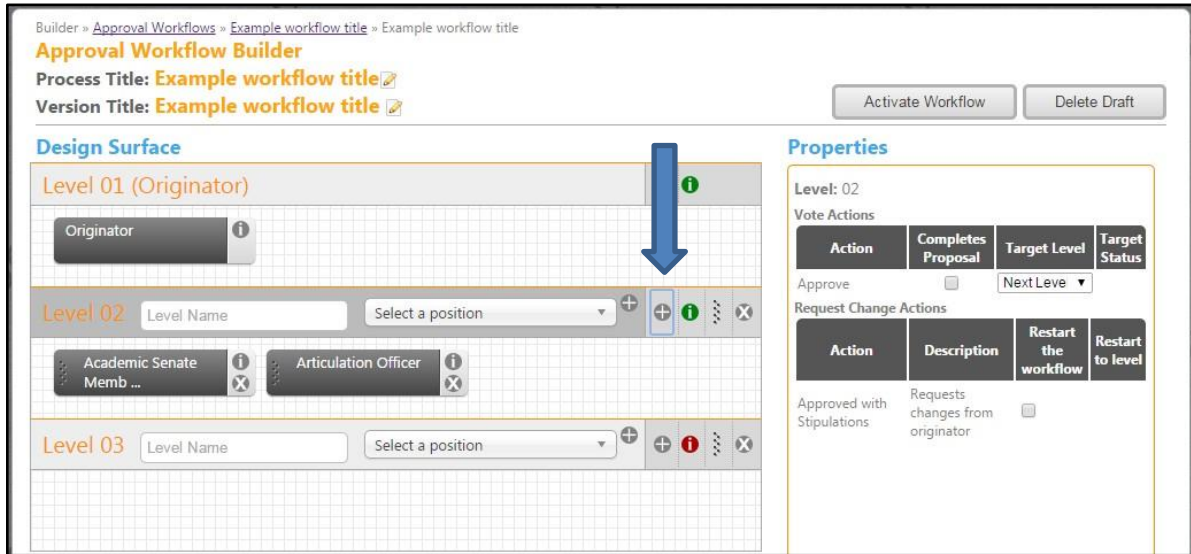
After you have pressed the “+” icon the selected position will appear in a dark grey box under the “Level 2” label. You then have to assign the appropriate permissions and details to that position. Press on the “i” icon that is within the newly added box.



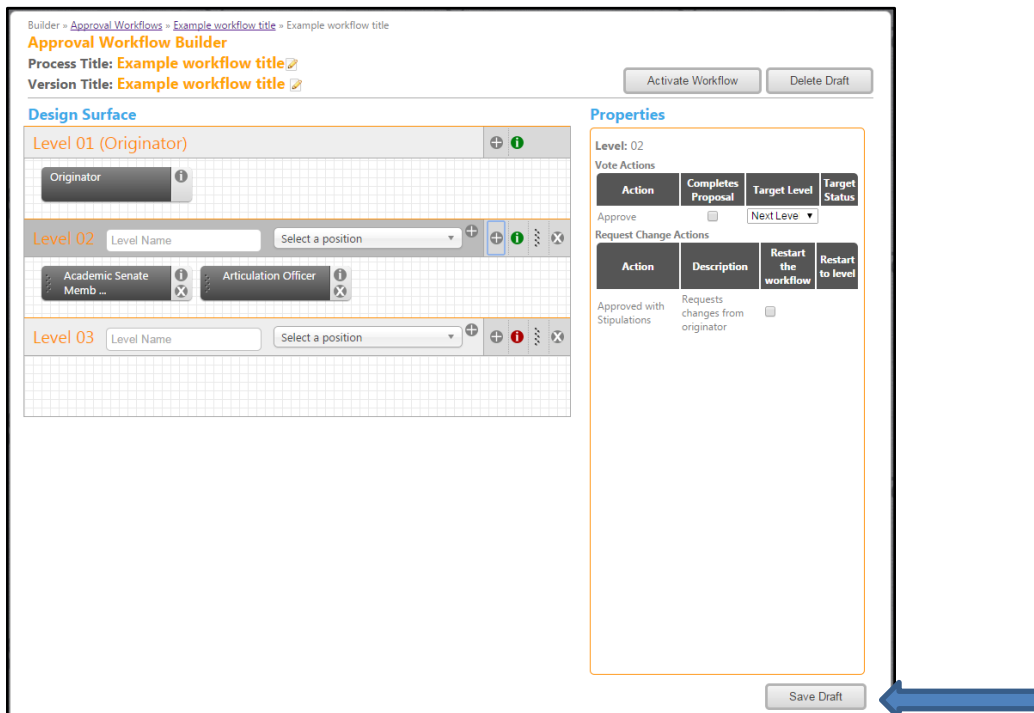
After you have pressed the “i” icon, the position properties options will appear on the right side of the screen. Here you can select if this position is required or optional. There is the option to type a number in the “Days” text box. This will determine how many days the user in this position has to take action on a proposal. You should select from the drop down what this position’s actions are. From the drop down you can select Request Change, Approve, Implement, Reject or Reviewed. After each position selection from this drop down, you can press the “+” icon to the right of the drop down. Once you have entered the information for a position, it will automatically save here.



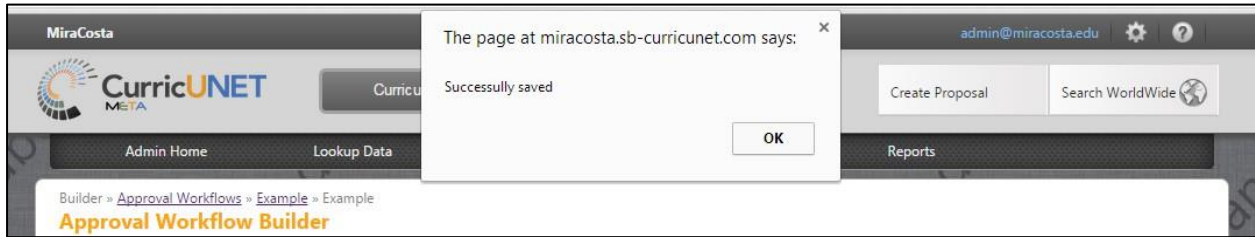
Pressing the “+” symbol is what will allow you to enter multiple actions for that position. If you make a mistake and want to remove an action that you have added, just press on the “x” icon next to that action name.



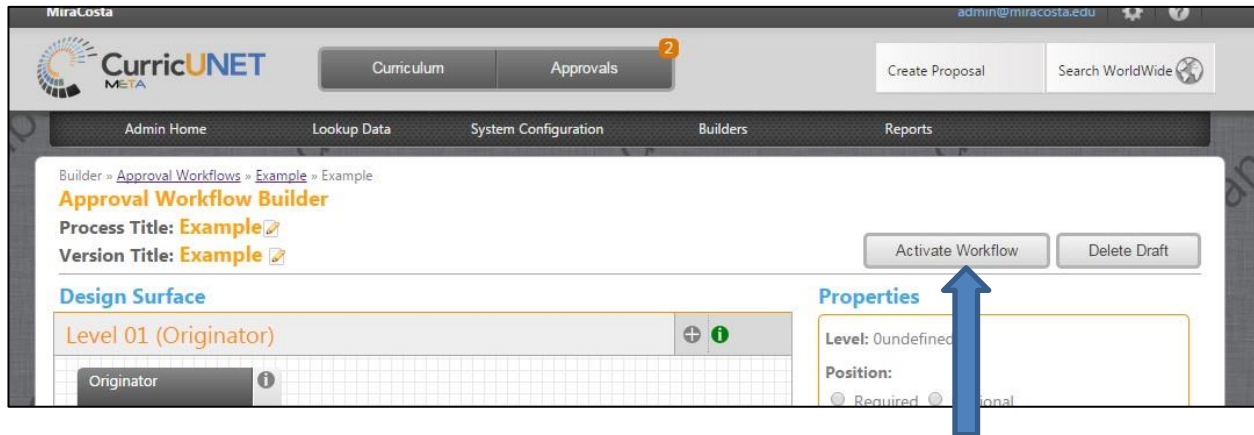
You can add multiple positions to a level. Repeat the process that you did to add the first position. But keep in mind that in order for a level to be complete, at least one of the positions on that level need to be required, and each position needs at least one action. The “i” icon on the level bar will change to green when all the requirement of that level have been satisfied. If the “i” icon is still red, click on it. In the right hand column, there will be a display on what information is missing. When all positions for the level have been entered, press on the farthest right side “+” icon. This will make the next level appear.



When you have entered however many levels and positions that you want, press “Save Draft”.

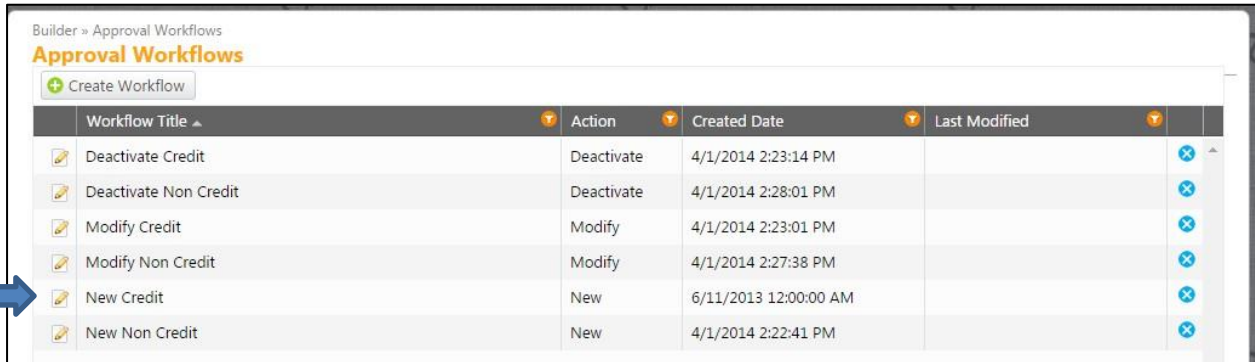


You will then get a pop up saying “Successfully saved”. Press “OK”.



If you want this newly created workflow to activate, you can press “Activate Workflow”.
When a workflow version becomes active that means it is now the version that the system is using for each Proposal Type that is tied to it.

Viewing Approval Process Configuration



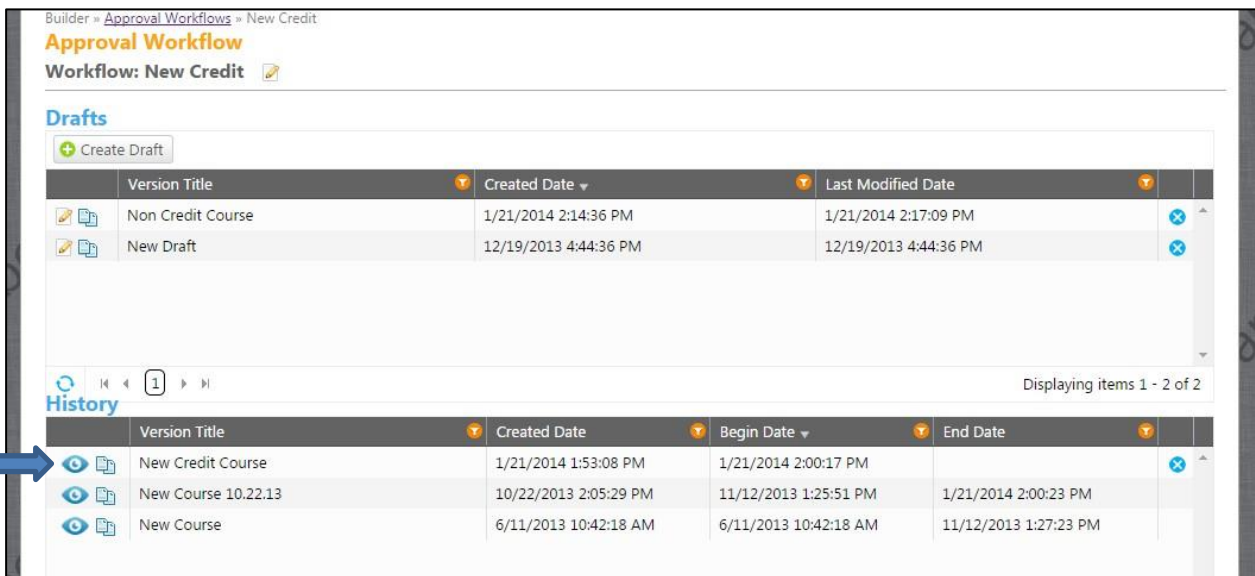
Builder » Approval Workflows

Approval Workflows

[+ Create Workflow](#)

| Workflow Title | Action | Created Date | Last Modified |
|-----------------------|------------|-----------------------|---------------|
| Deactivate Credit | Deactivate | 4/1/2014 2:23:14 PM | |
| Deactivate Non Credit | Deactivate | 4/1/2014 2:28:01 PM | |
| Modify Credit | Modify | 4/1/2014 2:23:01 PM | |
| Modify Non Credit | Modify | 4/1/2014 2:27:38 PM | |
| New Credit | New | 6/11/2013 12:00:00 AM | |
| New Non Credit | New | 4/1/2014 2:22:41 PM | |

To view a workflow press on the pencil icon to the left of the workflow title for which you will be viewing.



Builder » Approval Workflows » New Credit

Approval Workflow

Workflow: New Credit

Drafts

[+ Create Draft](#)

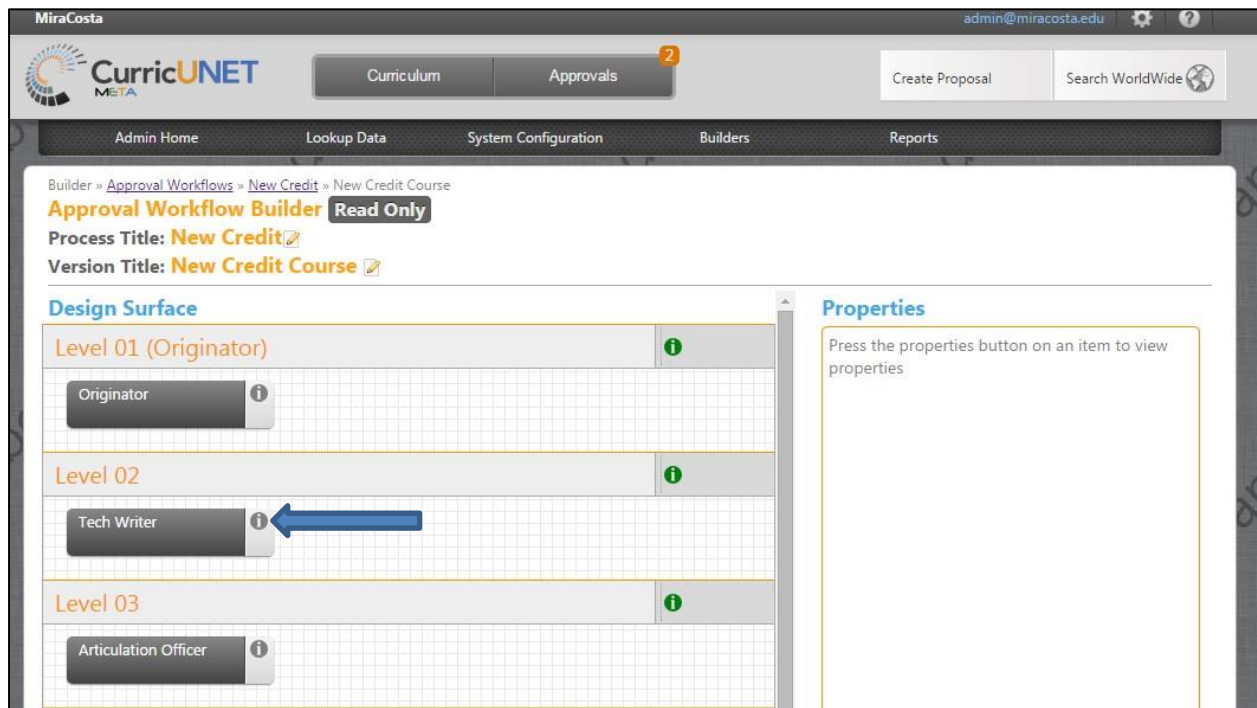
| Version Title | Created Date | Last Modified Date |
|-------------------|-----------------------|-----------------------|
| Non Credit Course | 1/21/2014 2:14:36 PM | 1/21/2014 2:17:09 PM |
| New Draft | 12/19/2013 4:44:36 PM | 12/19/2013 4:44:36 PM |

Displaying items 1 - 2 of 2

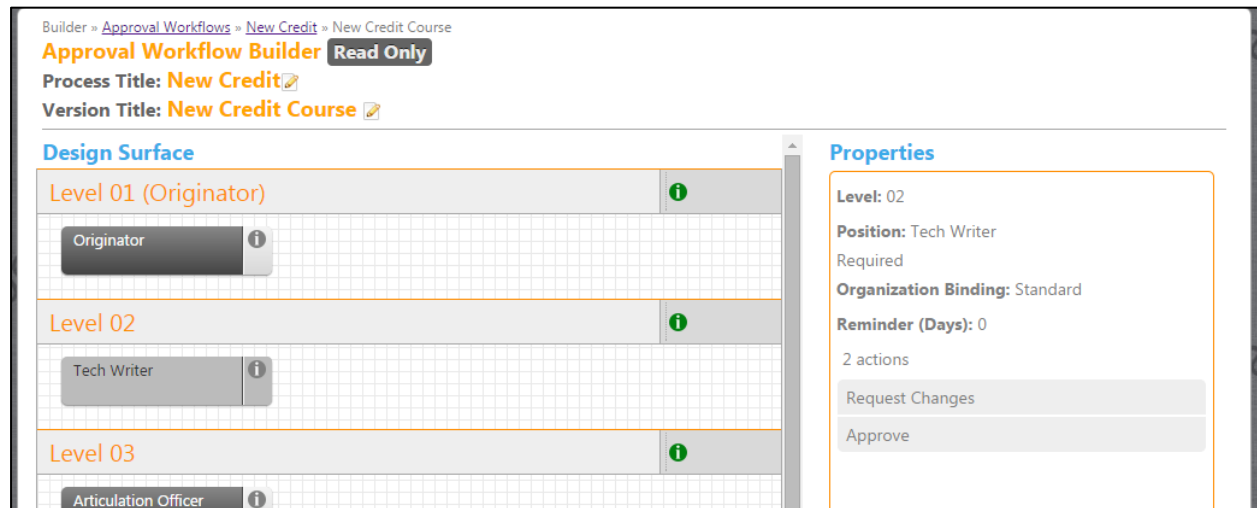
History

| Version Title | Created Date | Begin Date | End Date |
|---------------------|-----------------------|-----------------------|-----------------------|
| New Credit Course | 1/21/2014 1:53:08 PM | 1/21/2014 2:00:17 PM | |
| New Course 10.22.13 | 10/22/2013 2:05:29 PM | 11/12/2013 1:25:51 PM | 1/21/2014 2:00:23 PM |
| New Course | 6/11/2013 10:42:18 AM | 6/11/2013 10:42:18 AM | 11/12/2013 1:27:23 PM |

This screen shows all of the drafts and history of this workflow. The currently active version is listed on the top of the list titled "History". Push on the blue eyeball icon.



To view the actions for each position press on the “i” icon associated with the position you want to view.

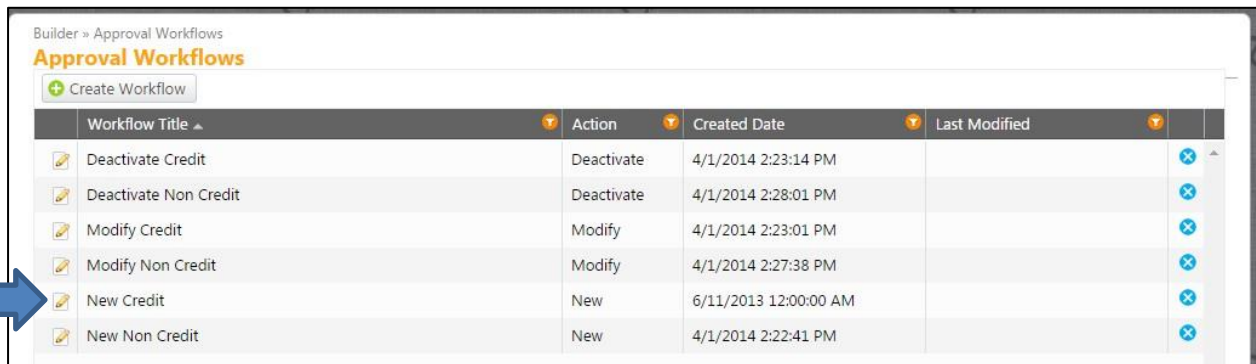


The actions are displayed on the right side of the screen. The Properties column displays position information: the position Level, the Position title, the Organizational Binding, the Days remaining to take action, and the position’s available actions.

Adjusting Approval Process

*This section explains how to make specific changes to the workflow process that will adjust where a proposal goes after changes are made. When “request change” has been chosen by a user along the approval process it is sent back to the originator to make the change. (The only exception to this is if a User has edit rights at their level in the workflow, which is rare). After the originator makes those changes, and re-sends the proposal back into the approval process, the default setting is for the proposal to return to the level that “requested the change”. Your institution has the option to adjust where that proposal will go after the changes are made. It can be sent back to any level that you choose. For example, you can set it so that the proposal has to go back to the beginning of the approval process to be looked at again by each level. This adjustment can be made to any and every position that has the “request change” action.

To edit a workflow press on the pencil icon to the left of the workflow title for which you will be viewing.



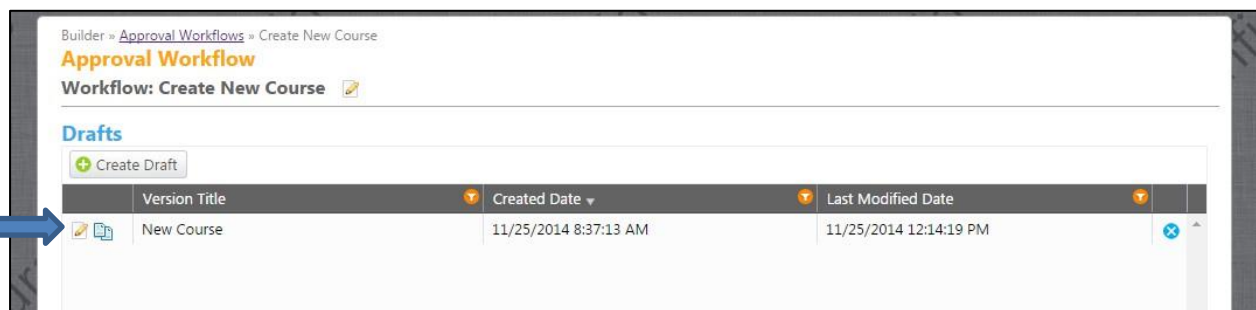
Builder » Approval Workflows

Approval Workflows

[+ Create Workflow](#)

| Workflow Title | Action | Created Date | Last Modified |
|-----------------------|------------|-----------------------|---------------|
| Deactivate Credit | Deactivate | 4/1/2014 2:23:14 PM | |
| Deactivate Non Credit | Deactivate | 4/1/2014 2:28:01 PM | |
| Modify Credit | Modify | 4/1/2014 2:23:01 PM | |
| Modify Non Credit | Modify | 4/1/2014 2:27:38 PM | |
| New Credit | New | 6/11/2013 12:00:00 AM | |
| New Non Credit | New | 4/1/2014 2:22:41 PM | |

There are two different ways to get to where you make these changes depending on if the workflow that you are adjusting is “active” or “draft, non-activated” version. To get into a draft version of a workflow press on the pencil symbol next to the Version Title.



Builder » Approval Workflows » Create New Course

Approval Workflow

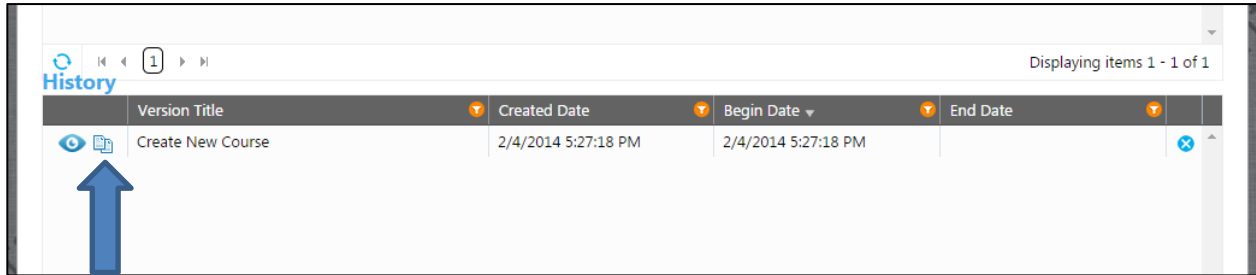
Workflow: Create New Course

Drafts

[+ Create Draft](#)

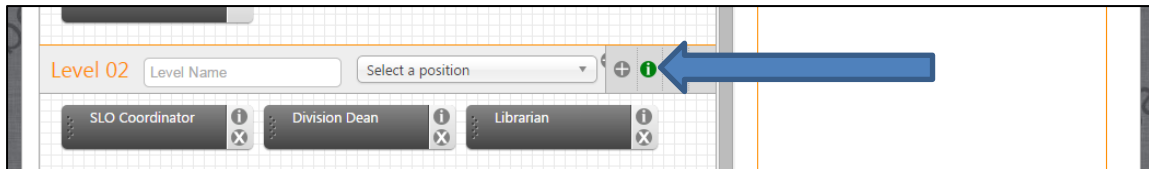
| Version Title | Created Date | Last Modified Date |
|---------------|-----------------------|------------------------|
| New Course | 11/25/2014 8:37:13 AM | 11/25/2014 12:14:19 PM |

If the workflow that you will be adjusting is already and “active” version then you will have to make a copy, make the changes, and then re-activate it. You will know if it is the “active version: if it is listed under “History” and does not have an “End Date”. To make a copy push on the blue paper symbol next to the Version Title.

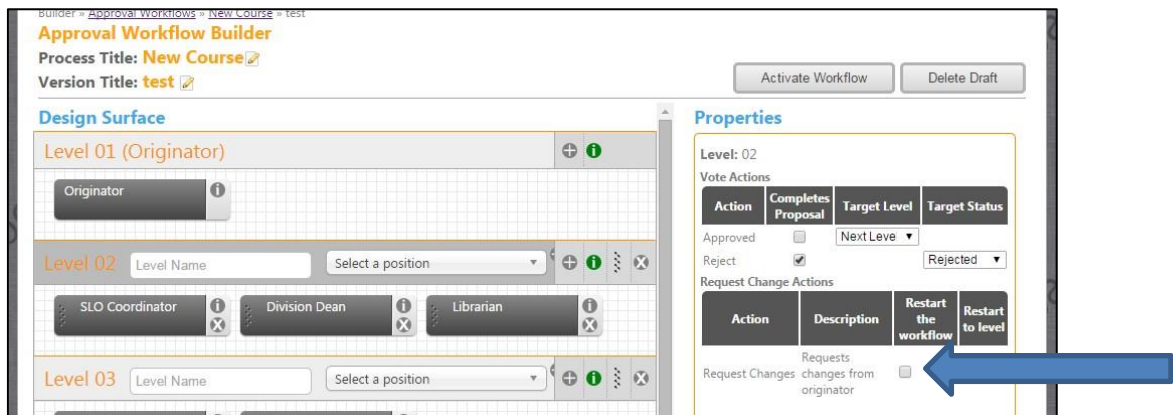


Once you are in the desired workflow you can choose the levels for which you would like to make this adjustment.

Select the “i” symbol on the level you are making the adjustment to.



After pressing on the “i” symbol you will be able to edit the “Properties” area. From here you should select the checkbox under “Restart the workflow”.



After you select that checkbox a number drop down will appear from which you can select the level that you want the proposal to return to after changes are made.

Properties

Level: 02

Vote Actions

| Action | Completes Proposal | Target Level | Target Status |
|----------|-------------------------------------|--------------|---------------|
| Approved | <input type="checkbox"/> | Next Level ▾ | |
| Reject | <input checked="" type="checkbox"/> | | Rejected ▾ |

Request Change Actions

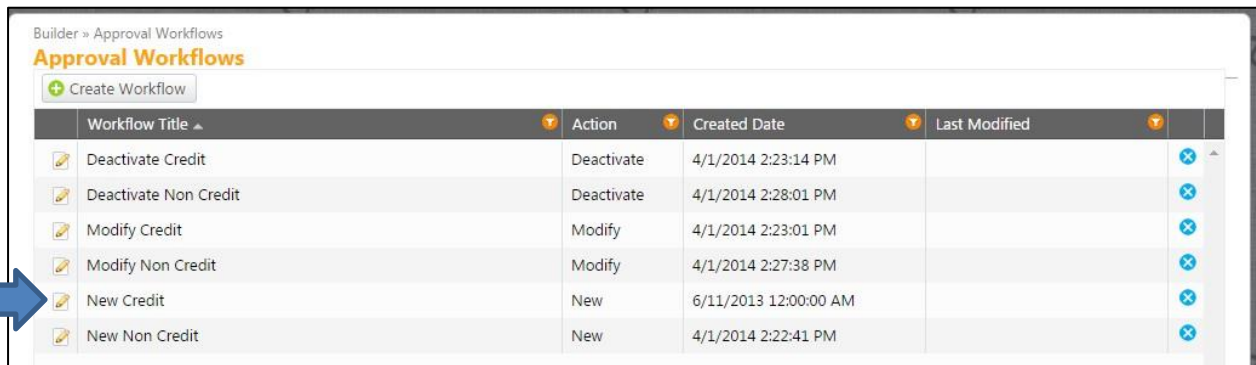
| Action | Description | Restart the workflow | Restart to level |
|-----------------|----------------------------------|-------------------------------------|--|
| Request Changes | Requests changes from originator | <input checked="" type="checkbox"/> | 02 ▾ Select One 02 03 04 05 06 07 08 09 |

This adjustment can be done on any level that had “request change” as an option. After changes are made you can either “Activate Workflow” or “Save Draft”.

Adjusting Approval Process Defining Working days for Reminders

Each position in the workflow has a setting to receive reminder emails that they have a proposal waiting for them. Administrators can adjust how often users receive these reminder emails.

To edit a workflow press on the pencil icon to the left of the workflow title for which you will be viewing.



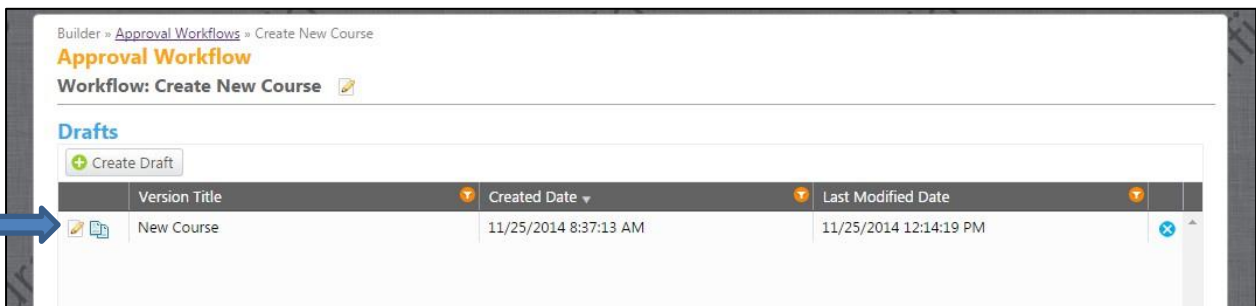
Builder » Approval Workflows

Approval Workflows

[+ Create Workflow](#)

| Workflow Title | Action | Created Date | Last Modified |
|-----------------------|------------|-----------------------|---------------|
| Deactivate Credit | Deactivate | 4/1/2014 2:23:14 PM | |
| Deactivate Non Credit | Deactivate | 4/1/2014 2:28:01 PM | |
| Modify Credit | Modify | 4/1/2014 2:23:01 PM | |
| Modify Non Credit | Modify | 4/1/2014 2:27:38 PM | |
| New Credit | New | 6/11/2013 12:00:00 AM | |
| New Non Credit | New | 4/1/2014 2:22:41 PM | |

There are two different ways to get to where you make these changes depending on if the workflow that you are adjusting is “active” or “draft, non-activated” version. To get into a draft version of a workflow press on the pencil symbol next to the Version Title.



Builder » Approval Workflows » Create New Course

Approval Workflow

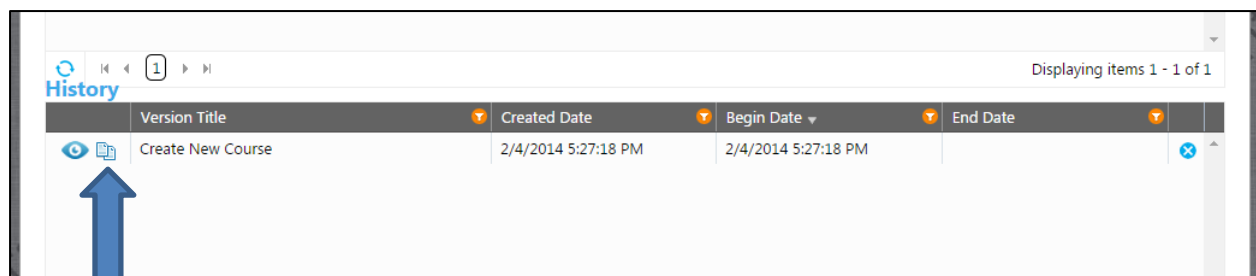
Workflow: Create New Course

Drafts

[+ Create Draft](#)

| Version Title | Created Date | Last Modified Date |
|---------------|-----------------------|------------------------|
| New Course | 11/25/2014 8:37:13 AM | 11/25/2014 12:14:19 PM |

If the workflow that you will be adjusting is already and “active” version then you will have to make a copy, make the changes, and then re-activate it. To make a copy push on the blue paper symbol next to the Version Title.



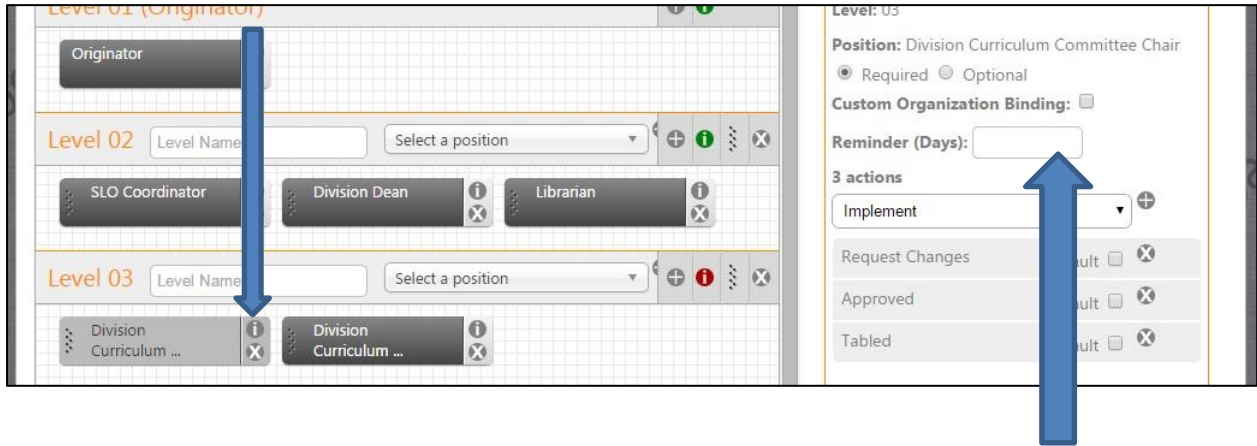
History

Displaying items 1 - 1 of 1

| Version Title | Created Date | Begin Date | End Date |
|-------------------|---------------------|---------------------|----------|
| Create New Course | 2/4/2014 5:27:18 PM | 2/4/2014 5:27:18 PM | |

Once you are in the desired workflow you can choose which positions for which you would like to make this adjustment.

To adjust the reminder days setting press on the “i” symbol that is directly on the position.



In this section you can simply set the number of days in the Reminder Days box. If the box has no number or a “0” then it is not set to send any reminder emails. You need to tell the system how often to send the emails if you want reminder emails sent to approvers.

After you have made this adjustment to all desired positions you can either “Activate Workflow” or “Save Draft”.

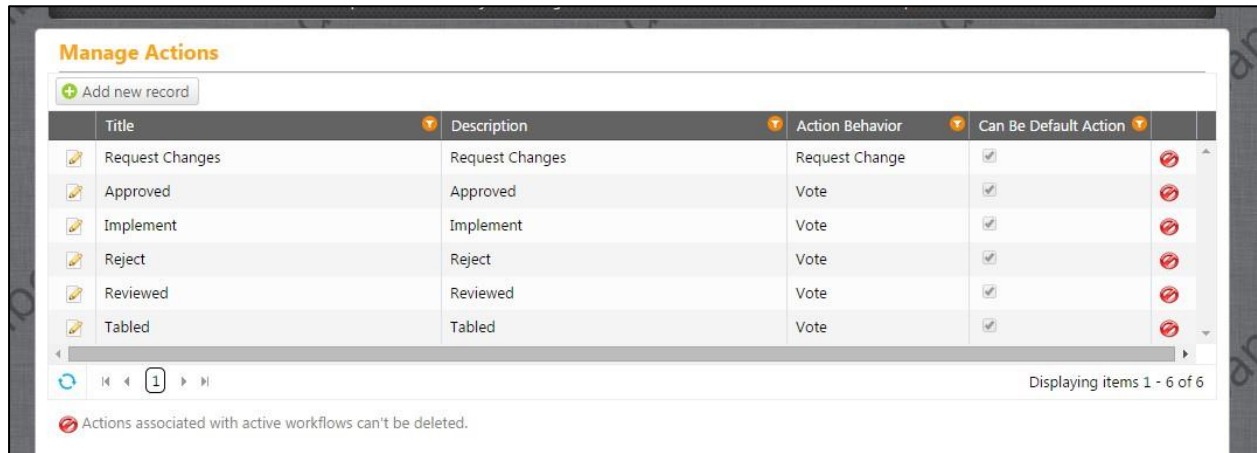
The Custom Organization Binder checkbox allows for a certain workflow to go to an additional department. Having this checked is also dependent on the forms being built to allow selection of that department.

Adjusting Approval Process Defining working days for Default Action

The Meta system allows an Administrator to adjust the workflow so that if a position goes a set period of time without taking action that the proposal will be moved by default. First this needs to be set at an action level, and then a position level.

To set actions to have this option go into the “Manage Actions” area. (see page 20 for instructions to get to Manage Actions)

To make an action so that it has this default setting option available make sure it’s checkbox is checked in the “Can Be Default Action” area.



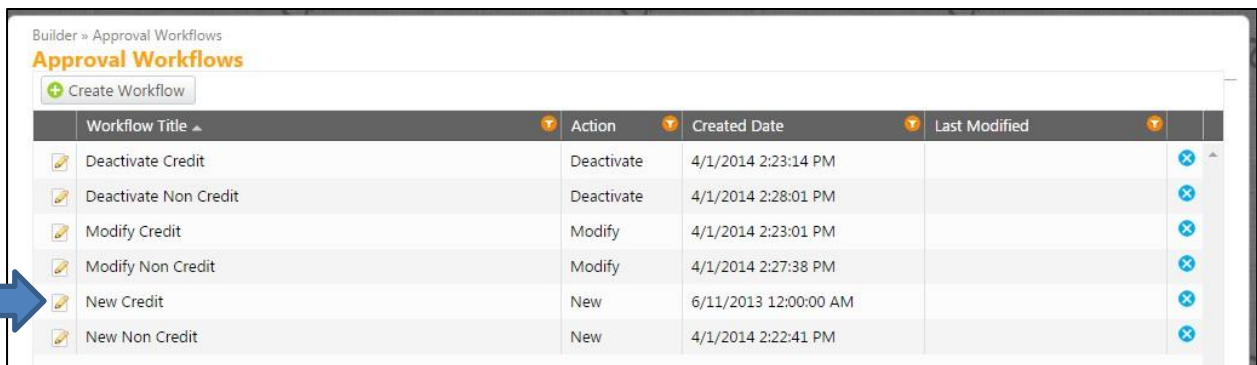
The screenshot shows the 'Manage Actions' interface. At the top, there is a button labeled 'Add new record'. Below it is a table with the following columns: Title, Description, Action Behavior, and Can Be Default Action. The table contains six rows of actions:

| Title | Description | Action Behavior | Can Be Default Action |
|-----------------|-----------------|-----------------|-------------------------------------|
| Request Changes | Request Changes | Request Change | <input checked="" type="checkbox"/> |
| Approved | Approved | Vote | <input checked="" type="checkbox"/> |
| Implement | Implement | Vote | <input checked="" type="checkbox"/> |
| Reject | Reject | Vote | <input checked="" type="checkbox"/> |
| Reviewed | Reviewed | Vote | <input checked="" type="checkbox"/> |
| Tabled | Tabled | Vote | <input checked="" type="checkbox"/> |

At the bottom of the table, there is a pagination control showing '1' and 'Displaying items 1 - 6 of 6'. A note at the bottom left states: 'Actions associated with active workflows can't be deleted.'

Once the action has the option for default you can then go into the workflow and make the specific adjustment to each desired position.

To edit a workflow press on the pencil icon to the left of the workflow title for which you will be viewing.



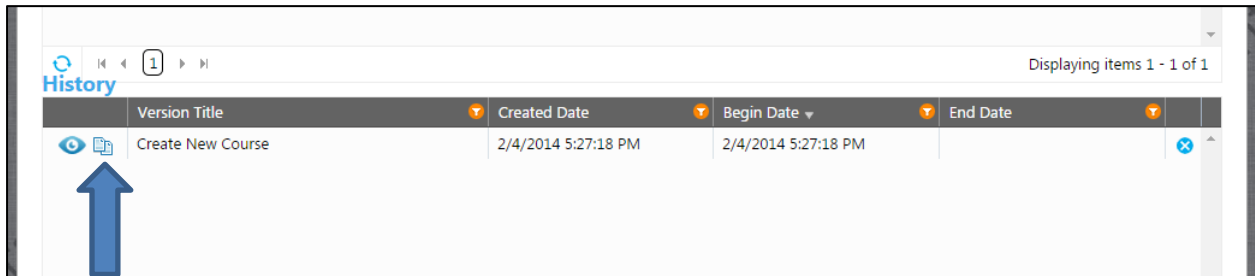
The screenshot shows the 'Approval Workflows' interface. At the top, there is a button labeled 'Create Workflow'. Below it is a table with the following columns: Workflow Title, Action, Created Date, and Last Modified. The table contains six rows of workflows:

| Workflow Title | Action | Created Date | Last Modified |
|-----------------------|------------|-----------------------|---------------|
| Deactivate Credit | Deactivate | 4/1/2014 2:23:14 PM | |
| Deactivate Non Credit | Deactivate | 4/1/2014 2:28:01 PM | |
| Modify Credit | Modify | 4/1/2014 2:23:01 PM | |
| Modify Non Credit | Modify | 4/1/2014 2:27:38 PM | |
| New Credit | New | 6/11/2013 12:00:00 AM | |
| New Non Credit | New | 4/1/2014 2:22:41 PM | |

A blue arrow points to the 'New Credit' workflow row. At the bottom right of the table, there are icons for editing (pencil) and deleting (trash) for each workflow.

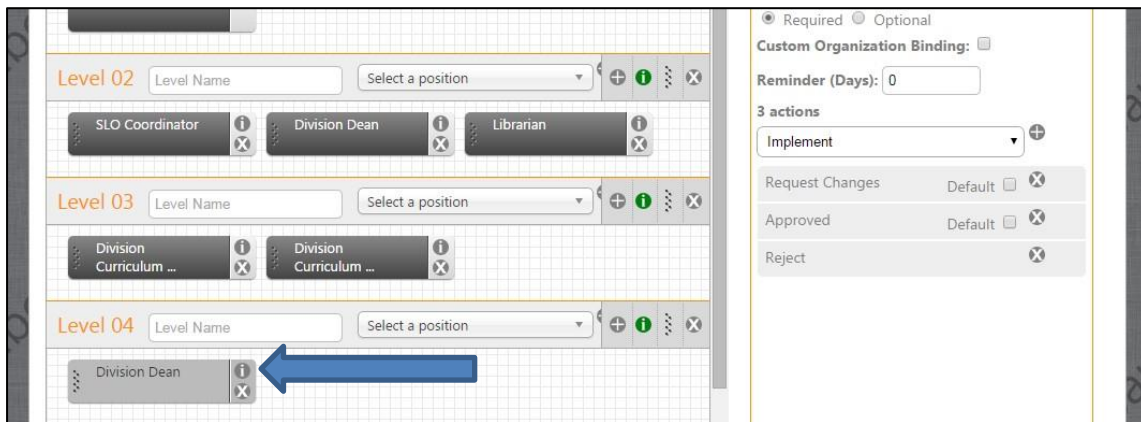
There are two different ways to get to where you make these changes depending on if the workflow that you are adjusting is “active” or “draft, non-activated” version. To get into a draft version of a workflow press on the pencil symbol next to the Version Title.

If the workflow that you will be adjusting is already and “active” version then you will have to make a copy, make the changes, and then re-activate it. To make a copy push on the blue paper symbol next to the Version Title.



Once you are in the desired workflow you can choose which positions for which you would like to make this adjustment.

To select the position to be adjusted for this setting press on the “i” symbol that is directly on the position.



From there press on the checkbox labeled “Default” within the action that you are adjusting. For example, if you want to set the days for which the Division Dean has to approve a proposal before it moves past him/her then select this “Approved” Default checkbox.

The screenshot displays a workflow configuration interface. On the left, there are two levels: Level 03 and Level 04. Each level has a 'Level Name' input field and a 'Select a position' dropdown menu. Above Level 03, there are three roles: SLO Coordinator, Division Dean, and Librarian. Below Level 03, there are two 'Division Curriculum ...' roles. Below Level 04, there is one 'Division Dean' role. On the right, a '3 actions' panel is visible. The first action is 'Implement', which is selected. Below it, there are two actions: 'Request Changes' and 'Approved'. The 'Request Changes' action has a 'Default' checkbox that is unchecked. The 'Approved' action has a 'Default' checkbox that is checked. Below these actions, there are two input fields: 'This action occurs automatically after 0 days' and 'Send a warning 0 days prior to default action'. At the bottom of the panel, there is a 'Reject' action.

In the example above you can see that you type the numbers of days for desired action in the boxes. You can enter a number of days for default in the “This action occurs automatically after” box and can enter a number for how often a warning/reminder email is sent in the “Send a warning” box.

After all the positions have been adjusted to how you want them select “Activate Workflow” or “Save Draft” .

Lookup Tables



To get to the User Administration area, push on the gear icon on the top right of the screen and select “Administer Site”.



This is the Administration area. To use manage Lookup Tables, press on “Lookup Data”.

The screenshot shows the 'Lookup Management - AA Code' page. On the left, a sidebar lists various lookup table categories: AA Code, Academic Group, Academic Year, Articulation Type, Assessment Method, Assignment Type, Award Type, and Basic Skill. The main area contains a table with the following data:

| Title | Description | Start Date | End Date | Ord. |
|-------|--|------------|----------|------|
| A1 | English Composition | 01/01/2013 | - | 0 |
| A2 | Analytical Thinking and Oral Communication | 01/01/2013 | - | 0 |
| B | Natural Sciences | 01/01/2013 | - | 0 |
| C | Humanities | 01/01/2013 | - | 0 |
| D | Social and Behavioral Sciences | 01/01/2013 | - | 0 |
| E | Integrated Self and Life-Long Learning | 01/01/2013 | - | 0 |

This is the Lookup Management area. This lists all of the possible lookup tables for the system. Your particular institution does not currently use every type of lookup table, but these are an example of what is available.

If you want to edit the contents of a lookup table, select the table from the list on the left. You can scroll down to view them all and find the ones that currently apply to your institution.

The screenshot shows the 'Lookup Management - Grade Option' page. A blue arrow points to the 'Grade Option' category in the sidebar. The main area contains a table with the following data:

| Title | Description | Start Date | End Date | Ord. |
|----------------------|----------------------|------------|------------|------|
| ABC (optional) | ABC (optional) | 04/14/2014 | - | 1 |
| Crd/No Crd | Crd/No Crd | 04/14/2014 | 05/09/2014 | 1 |
| No Grade | No Grade | 04/14/2014 | - | 1 |
| Non-Graded - ES, HSP | Non-Graded - ES, HSP | 04/14/2014 | 05/09/2014 | 1 |
| Pass/No Pass | Pass/No Pass | 04/14/2014 | - | 1 |
| Graded | Graded | 09/16/2014 | - | 2 |

Here is an example after scrolling down. In this example "Grade Option" is being selected.

The screenshot shows the CurricUNET interface with the 'Lookup Management - Grade Option' section. The table contains the following data:

| Expire | Title | Description | Start Date | End Date | Ord. |
|--------------------------|------------------------------|----------------------|------------|------------|------|
| <input type="checkbox"/> | ABC (optional) | ABC (optional) | 04/14/2014 | - | 1 |
| <input type="checkbox"/> | Expired Crd/No Crd | Crd/No Crd | 04/14/2014 | 05/09/2014 | 1 |
| <input type="checkbox"/> | No Grade | No Grade | 04/14/2014 | - | 1 |
| <input type="checkbox"/> | Expired Non-Graded - ES, HSP | Non-Graded - ES, HSP | 04/14/2014 | 05/09/2014 | 1 |
| <input type="checkbox"/> | Pass/No Pass | Pass/No Pass | 04/14/2014 | - | 1 |
| <input type="checkbox"/> | Graded | Graded | 09/16/2014 | - | 2 |

This is an example of the “Grade Option” lookup table items. Here you can see your institution’s grading options.

To edit an option, press on the pencil icon to the left of that item.

The screenshot shows the edit form for a 'Grade Option' item. The form fields are:

- Title:** * Pass/No Pass
- Description:** Pass/No Pass
- Order:** 1
- Start date:** * 4/14/2014

At the bottom of the form, there are two icons: a green checkmark (save) and a red X (cancel). A blue arrow points to the green checkmark icon.

This is the area in which you can edit a lookup table item. After you have made the desired changes press on the green check icon to save.

The screenshot shows the CurricUNET interface. At the top, there is a navigation bar with 'Curriculum' and 'Approvals' tabs. Below that, a breadcrumb trail includes 'Admin Home', 'Lookup Data', 'System Configuration', 'Builders', and 'Reports'. The main content area is titled 'Lookup Management - Grade Option'. On the left, there is a sidebar with various lookup categories like 'IgetC Code', 'Instruction Type', etc. The main area features a table with columns: Title, Description, Start Date, End Date, and Order. A blue arrow points to a '+ Add new record' button located above the table.

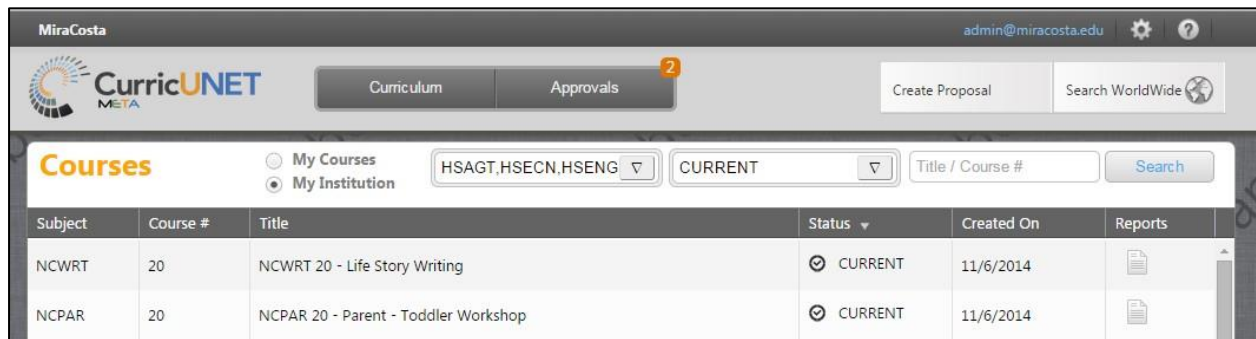
| | Title | Description | Start Date | End Date | Order |
|---------|----------------------|----------------------|------------|------------|-------|
| Expire | ABC (optional) | ABC (optional) | 04/14/2014 | - | 1 |
| Expired | Crd/No Crd | Crd/No Crd | 04/14/2014 | 05/09/2014 | 1 |
| Expire | No Grade | No Grade | 04/14/2014 | - | 1 |
| Expired | Non-Graded - ES, HSP | Non-Graded - ES, HSP | 04/14/2014 | 05/09/2014 | 1 |
| Expire | Pass/No Pass | Pass/No Pass | 04/14/2014 | - | 1 |
| Expire | Graded | Graded | 09/16/2014 | - | 2 |

To add an item to a lookup table, press “Add new record”.

The screenshot shows the 'Add new record' form for the 'Grade Option' lookup table. The form includes fields for 'Title:', 'Description:', and 'Order:'. There is also a 'Start date:' field with a calendar icon. At the bottom of the form, there are two buttons: a green checkmark icon and an orange X icon. A blue arrow points to these buttons.

Here you can enter in the information for the new lookup table item. After inputting information, press on the green check icon to save. If you change your mind and want to get out of this area without saving, press on the orange icon that is next to the check icon.

“Live Edit Rights” Access to Active Records:



The screenshot shows the CurricUNET interface with a table of active records. The table has columns for Subject, Course #, Title, Status, Created On, and Reports. Two records are visible:

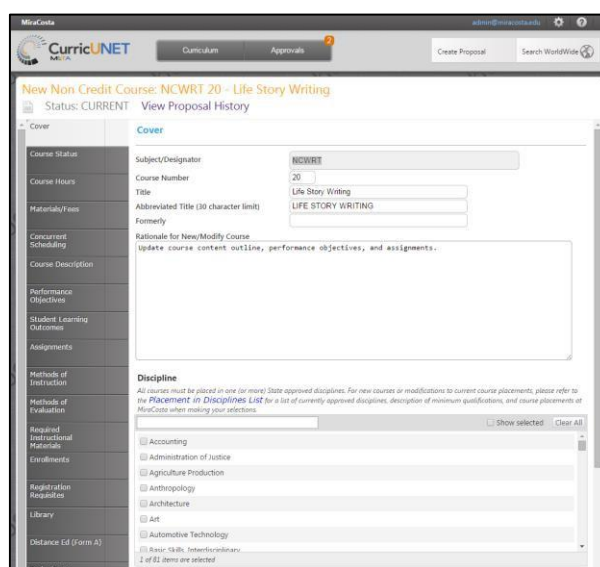
| Subject | Course # | Title | Status | Created On | Reports |
|---------|----------|--------------------------------------|---------|------------|---------|
| NCWRT | 20 | NCWRT 20 - Life Story Writing | CURRENT | 11/6/2014 | |
| NCPAR | 20 | NCPAR 20 - Parent - Toddler Workshop | CURRENT | 11/6/2014 | |

When logged in as an administrator who has been given “live edit permissions” you can edit any proposal. Open up the course or program that needs to be edited.

(If your institution wants someone to have “live edit permissions”, just let Governet know and we will set that up on our end.)



Press “View Course Proposal”.

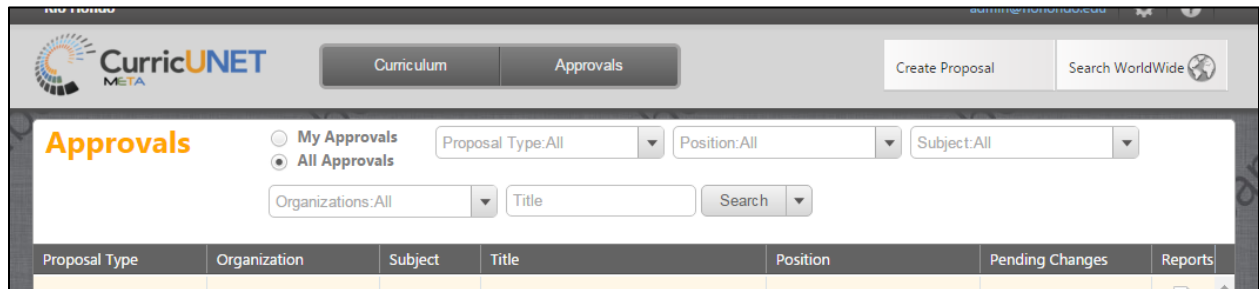


The screenshot shows the CurricUNET interface with a page titled “New Non Credit Course: NCWRT 20 - Life Story Writing”. The page displays the course details, including the course status (CURRENT), course number (20), title (Life Story Writing), and a list of disciplines. The disciplines listed are Accounting, Administration of Justice, Agriculture Production, Anthropology, Architecture, Art, Automotive Technology, and Basic Skills Interdisciplinary. The page also includes a section for “Cover” with fields for Subject/Designator, Course Number, Title, Abbreviated Title (30 character limit), Formerly, and Rationale for New/Modify Course.

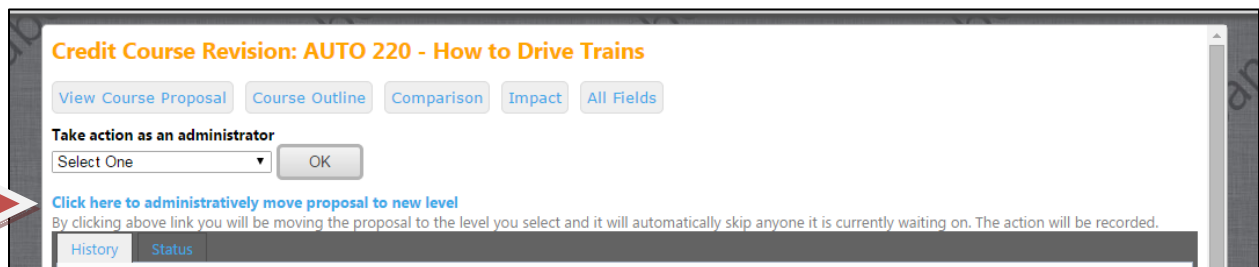
Make desired changes and press “save”.

Administrator Override in Workflow

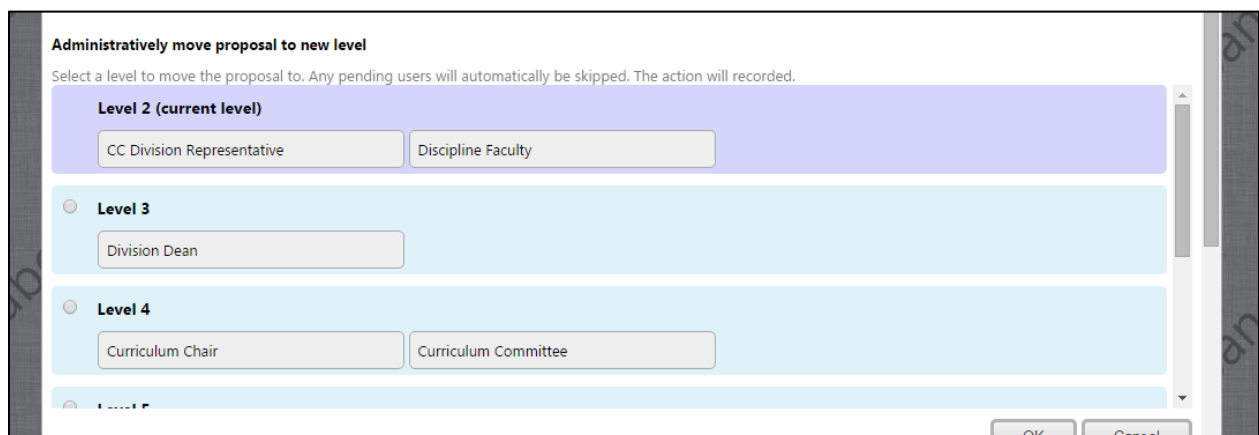
As an administrator you can override a workflow step. An example of when you would need to do this is when a proposal is awaiting a specific user in order to move it forward, but that user is out of the office for a period of time. In such a case an administrator can take action in place of that user and force the proposal to a different workflow level.



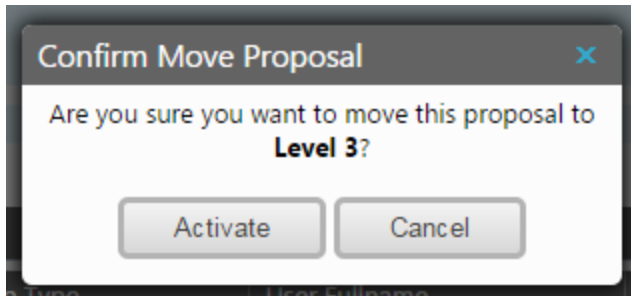
To view all the Approvals in the system go to “Approvals”, select “All Approvals”, and then press “Search”. This will then display a list of all proposals that are “In Review”. Select whichever proposal that you would like to move. There are two different ways for an admin to force a proposal to a different level.



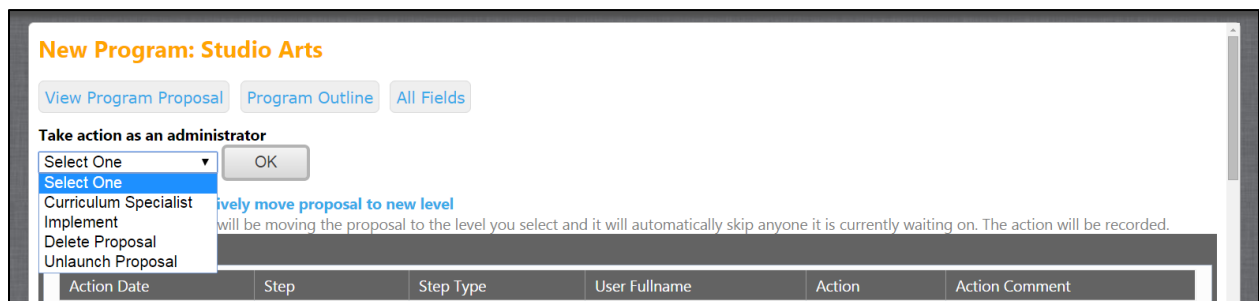
The first option is to select the “Click here to administratively move proposal to new level”.



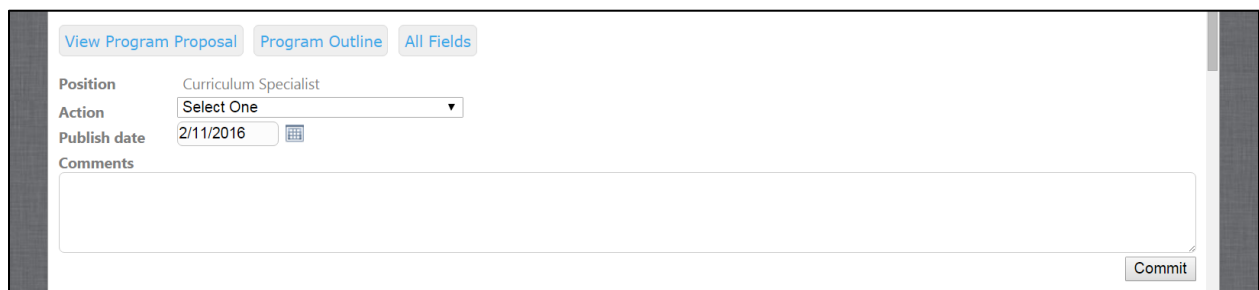
Here you will see which level the proposal is currently on in purple. You are able to select which level you want it moved to and press “OK”.



You will then get a confirmation message on which you need to select “Activate”.



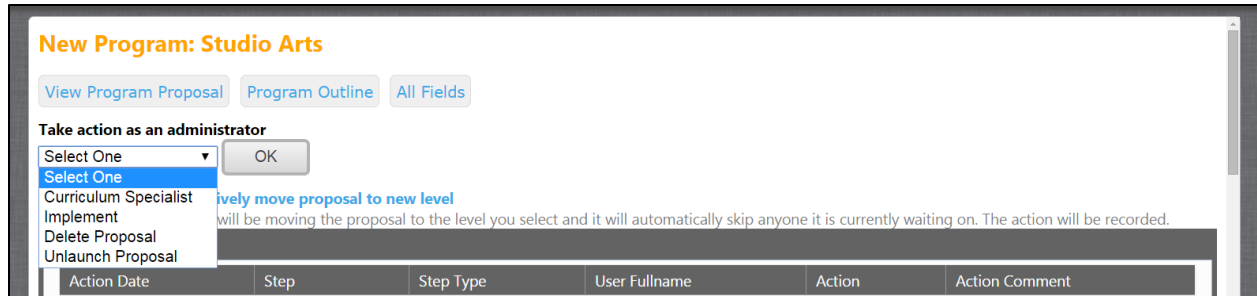
The other option is to choose the position or action that you would like to use form the “Take action as an administrator” drop down and press “ok”.



From there you are able to select the action and commit the action.

Removing Proposals from Process

As an Administrator you have the ability to both Delete and Unlaunch Proposals that are “In Review”, or “In Process”.



You do this through the “Take action as an administrator” drop down. Make your selection, press “ok” and confirm your selected action. Delete will delete the proposal from the system and Unlaunch will move that proposal back to “Draft” status.