

Curriculog Quick Guides

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How to Import Data for Course or Program

1. Start a proposal by selecting “New Proposal” on the Curriculog Proposal page.
2. Select “Run Impact Report” on the top left corner of the form.
 - a. For program proposals the selection of “Program” under “Program Type” must occur first.
3. Select the catalog year in which the change will occur.
4. Utilize the desired search criteria and select search to pull the desired course or program data.
5. Import all check marked data by selecting “Import This Item”.

How to Run an Impact Report

1. Start a new proposal, import data, fill in blank required fields.
2. Select “Run Impact Report” at the top of the form.
3. Select the “Catalog” for the catalog year in which the proposal is for under the Acalog category.
 - a. This should be the immediate next catalog year.
4. Select “Generate Report”.
5. Copy and paste the report to the proposal where designated under “Copy & Paste the Impact Report in this Field”.

How/When to make Proposed Changes in the Revision Proposal (Originator Step)

1. Start a new proposal, import data, fill in all blank required fields.
 - a. Do not make proposed edits to the course or program details yet.
2. Launch the proposal by selecting “Validate and Launch Proposal”. If there are no errors, then select “Launch”.
 - a. If items are missing or in error, you will receive a message detailing the issues to correct. Correct the errors and reselect “Validate and Launch Proposal”.
3. Go to “My Proposals” under the “Proposals” tab on the Curriculog home back. Select the proposal to edit.
 - a. The proposal is in the “Originator” Step which allows the originator of the proposal to make edits, so they are tracked appropriately for others in the workflow to review.
4. Make the proposed edits to the course or program details desired.
 - a. Make sure to hit save under each section where edits are made.
5. Once all edits are made, select the “Decision” tab on the right of the page, followed by “Approve”, and “Make My Decision” to fully submit the proposal with the requested changes.

How to Initiate a University Curriculum Proposal Through Curriculog

1. Log into [Curriculog](#) utilizing a Florida Poly Net ID username and password.
 - a. Each faculty and department chair has access to Curriculog.
2. Select the “Proposal” tab at the top left-hand corner of the Curriculog home page.
3. Select the “New Proposal” button.
4. Select the appropriate form for the desired proposal by clicking on the check mark next to the name.
5. Import the data, fill in all blank required fields, validate and launch the proposal.
 - a. For revision proposals an additional originator step is required. Proposed changes are made after the launch, and the originator will then approve their proposal to move it into the workflow.

How to Launch a Proposal

1. Start a new proposal, import data, attached required documents, fill in all blank required fields.
2. Select "Validate and Launch Proposal".
 - a. For new or deletion proposals this moves the proposal on in the workflow and completes the launch.
3. For revision proposals, then go to "My Proposals" under the "Proposals" tab. Select the proposal.
4. Make desired changes and select "Save" under each section where changes are made.
5. Select the "Decisions" tab on the right side of the proposal form.
6. Select "Approve" followed by "Make My Decision".
 - a. This completes the launch, and the proposal has moved on in the workflow.

How to Attach a File

1. Start a new proposal, import data, fill in all blank required fields.
2. Select the "Files" tab on the right side of the form.
3. Select "Choose File" and select the desired file.
4. Select "Upload".

How to Track a Proposal in the Workflow

1. Select the proposal under "Proposals" in the Curriculog home page.
2. Select the "Workflow Status" tab on the right side of the proposal form.
3. Each step in the workflow is defined here. P
 - a. Participants listed are under each step with their decision.
 - b. The progress of each step is provided (ex. working, incomplete, approved).

How to Manage "My Tasks"

1. Proposals listed here required action.
 - a. Proposals provide the title of the course or program. As well, the proposal type is categorized below the title.
 - b. A brief overview of the workflow is provided by green thumbs up sign and a red thumbs down sign.
 - c. The last activity date is provided here.
2. Select the desired proposal to review and make the desired decision.

How to View the Agenda

1. Select the "Agendas" tab at the top of the Curriculog webpage.
2. Select "My Agendas" to review new agenda items.
 - a. Agendas are posted at least 24 hours prior to the committee meeting.
3. Select "All Agendas", "My Archived Agendas", or the "Archived Agendas" to view past agendas.

How to Review Edits and Make a Decision

1. Select the proposal.
 - a. A proposal may be found under:
 - i. *My Tasks* – if an action is required of you.
 - ii. *My Proposals* – if it is your proposal.
 - iii. *All Proposal* – all proposals with search abilities.
2. Select the view under “User Tracking” within the “Discussion” Tab on the right side of the form. Then review the content on the form on the left and any comments or completed actions on the right side of the page.
 - a. *Show current* – shows the edits made by the originator as a final version (no mark-up).
 - b. *Show original* – shows the original content as a final version (no mark-up).
 - c. *Show current with markup* – shows the original content with the proposed changes as mark up (ex. red font).
3. Select the “Decisions” tab to make your decision on the proposal.
4. Select the desired decision. Decision options are user and workflow defined and all may not appear for a user to select.
 - a. *Approve* – Selecting Approve is indicating that you are approving the proposal in its current state and are signing off on it to move to the next step in its workflow. If you are the only participant on the step, the proposal will advance automatically. Entering a comment is optional when selecting Approve.
 - b. *Reject* – Rejecting a proposal indicates that you are not approving of it in its current state. You will be required to enter comments in order to submit the decision to reject, and as a best practice we would strongly suggest using the comments to explain the reasoning behind submitting a rejection. Depending upon the settings a proposal may take one of two paths when it has received a rejection. The two paths are back to the originator or the previous step.
 - c. *Hold* - Submits a request for the proposal to not advance in the workflow. The request is sent to the administrator, who will approve or reject the request. If the administrator approves the request and places the proposal on hold, the users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed.
 - d. *Suspend* - Submits a request for the proposal to be suspended from the workflow. Like the request for ‘Hold’, it is sent to the administrator, who will approve or reject the request. If the administrator approves the request and suspends the proposal, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed.
 - e. *Cancel* - Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the administrator who will approve or reject the request. If the administrator approves the cancel request, the proposal will be referred to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision. This is the only way you can delete a proposal after it has been launched.
 - f. *Custom Route* - A Custom Route is an additional ad hoc step outside the steps in the approval process that the administrator originally provided and require administrator approval. They will allow you to invite additional users or committees into a workflow for additional feedback.
5. Select “Make My Decision”.

How to Designate a Custom Route

1. A Custom Route is an additional ad hoc step outside the steps in the approval process that the administrator defines based upon the workflow step. They will allow you to invite additional users or committees into a workflow for additional feedback.
 - a. Custom Routes have a tab within the Proposal Toolbox on the right of the form where you will establish your Custom Route but starting them begins as a decision.
2. To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab, and then select "Make My Decision."
3. This will direct you to the Custom Route tab to configure the options for your Custom Route. The first option available will be for you to decide if you would like to re-name the step. It will default to "Custom Route" but if you would like to change it you can click in the field and replace the text.
4. The next option is to indicate who you would like to bring into the workflow by choosing the participants. Select the grey arrow to the left of "Participants" and the option will expand. Select "Add Participant".
5. This will launch a new window titled "Who is involved on this step?" and will display two options initially – Role Types and Hierarchy. Select either to locate a individual(s) by selecting the drop down symbol, and select the appropriate user.
6. Once you have determined the participants for the Custom Route, the next step will be to determine what they will be allowed to do by setting the Rules. To view the options available under Rules, click the arrow to the left to expand the section.
 - a. Select if the participants can edit or comment.
 - b. Select if you will require a signature.
 - c. Select if others may view the comments made by the step.
7. The Decisions section is where you will determine the types of decisions users can provide, and the direction the proposal will move in.
 - a. Approve / Reject 100% for approval – This option indicates that all users on the step must come to a unanimous decision for the step to be approved or rejected.
 - b. Vote: ___ % for approval – This option indicates that a threshold must be reached for the step to advanced, however it still requires that all users on the step provide a decision.
 - c. Quorum Vote: Require ___ % participation – This option indicates that a threshold must be reached for the step to advanced, however it does not require that all users on the step provide a decision.
8. The next option determines the path the proposal will take once the Custom Route has been approved. There are two options available and the path you choose will vary based on your needs for the Custom Route.
 - a. *Proposal should come back to this step* - This option is often chosen when the reason for a Custom Route is to invite a feedback loop.
 - b. *Proposal should advance to the next step* - This option is often selected when you are inviting a user into the workflow to make additional changes or comments and allow the workflow to progress after with no additional revisions on your part.
9. The last option on the Decisions tab is an additional notification that you can choose to provide, if the proposal is either approved or rejected.
 - a. Determine if a deadline is necessary and when reminder messages will be sent.
10. After selecting all the options associated with your Custom Route, you will be required to enter a comment. The comment is usually used to provide explanation to the user being invited and requires a minimum of two characters to be entered.

How to Search for Proposals

1. Select the appropriate list of proposals.
 - a. My tasks
 - b. My proposals
 - c. Watch list
 - d. All proposals
2. Select “Filter” to filter all proposals.
 - a. By Status (ex. Active)
 - b. By Type (ex. Course)
3. Select “Advance Filter” for more options and ability to filter on multiple data points.
 - a. Search by keyword
 - b. Status
 - c. Type
 - d. Current Step
 - e. My role or tasks

How to Cancel a Proposal (remove it from Curriculog)

1. Select the “Decisions” Tab on the right of the proposal.
2. Select the “Cancel” option followed by “Make my Decision”.
3. The proposal will be sent to the administrator to approve or reject the request.
4. If approved, it will be referred to the originator who can then re-launch it or delete the proposal from Curriculog. If only rejected, the proposal will remain on the current step awaiting a decision.
 - a. The only way to delete a proposal completely after it is launch is to cancel it.