

Curriculum Workflow Basics & Navigation

The Curriculum Workflow (a.k.a. Curriculum Management) is used to submit and gather approval of curriculum updates and other information published in the [UNC Catalogs](#).

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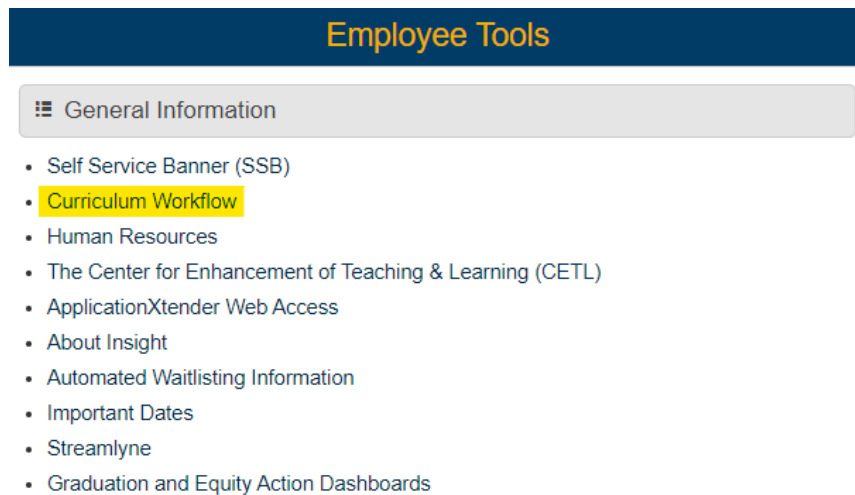
1) Access Roles in Curriculum Workflow

- a. Basic User Access
 - i. Curriculum Workflow users UNC's Enterprise Single Sign On (SSO). All faculty and staff members with a first.last user account will be able to login and have a "basic user" account.
 - ii. Basic Users are able to create and submit curriculum forms and open/review any in-progress or completed proposals with read-only access.
- b. Approver / Reviewer Access
 - i. Faculty and staff that review and/or approve curriculum (e.g., chairs, deans, curriculum committees, etc.) will need to receive special access. Curriculum Staff in the Office of the Registrar maintain this access with the help of Colleges.


- ii. Like basic users, approvers/reviewers are also able to create and submit curriculum forms and open/review any in-progress or completed proposals with read-only access.
- iii. Approvers will be able to open forms in their current workflow stage and **edit, comment, approve, or reject** the form. Approvers receive emails when curriculum is ready for review. This user type is for those with “signature authority” for curriculum review, such as chairs, deans, and committee chairs.
- iv. Reviewers will be able to open forms in their current workflow stage and **comment** on the form but cannot edit or approve. Reviewers receive emails when curriculum is ready for review. This user type is for those with the need to review but without “signature authority” – typically, members (not chairs) of curriculum committees make up this category.

2) Logging in to Curriculum Workflow


- a. To login to the Workflow, first go to URSA, then under the Employee Tab, Employee Tools section, click the link for Curriculum Workflow and sign in using your UNC credentials.



- b. If you do not wish to navigate to URSA each time, you may also bookmark this link (<https://unco.smartcatalogiq.com/home>) or may click the links that you may receive via email.
 - i. To login outside Ursa, click the “login” link in the upper right corner of the screen:

 login

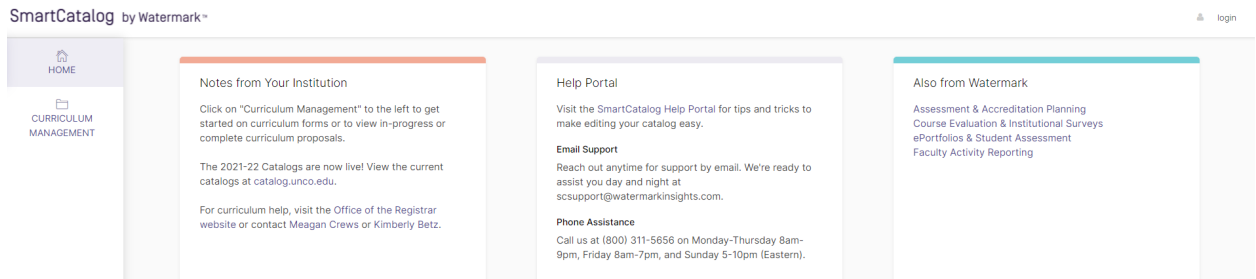
If you are already logged in, you should see “welcome, name”:

 welcome, meagan crews



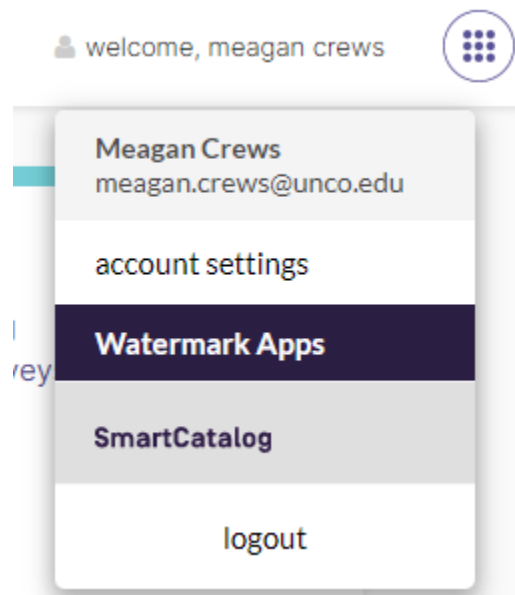
3) Home screen

- a. The home screen of the workflow includes three columns. The first column, “Notes from Your Institution” is where announcements or helpful information may be listed. The other columns are managed by Watermark and includes information from their help center.



4) Account Settings (Email Notifications)

- a. Clicking the 9 dots next to your name will bring up the option to edit your Account Settings.



- b. Email, name, and password are synced with UNC’s SSO and cannot be revised. To edit permissions for curriculum review/approval process, please contact the curriculum staff in the Office of the Registrar.
- c. Users are only able to revise their email notification settings. Users are automatically subscribed to all emails. If you wish to unsubscribe or re-subscribe, you may do so here.

Name

Meagan Crews

Email

meagan.crews@unco.edu

YOU ARE SUBSCRIBED TO RECEIVE THE FOLLOWING EMAILS:

To unsubscribe, please uncheck the appropriate box(es) and submit.

All Emails

Workbox Emails

Originator Emails

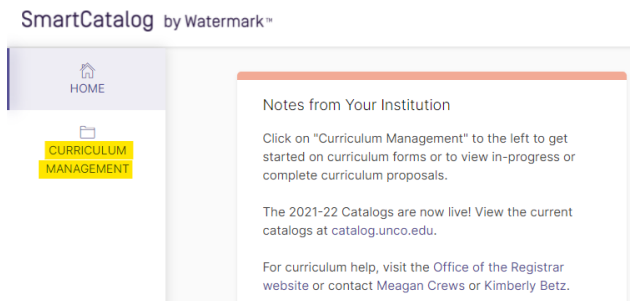
Return to Submitter Emails

Submit

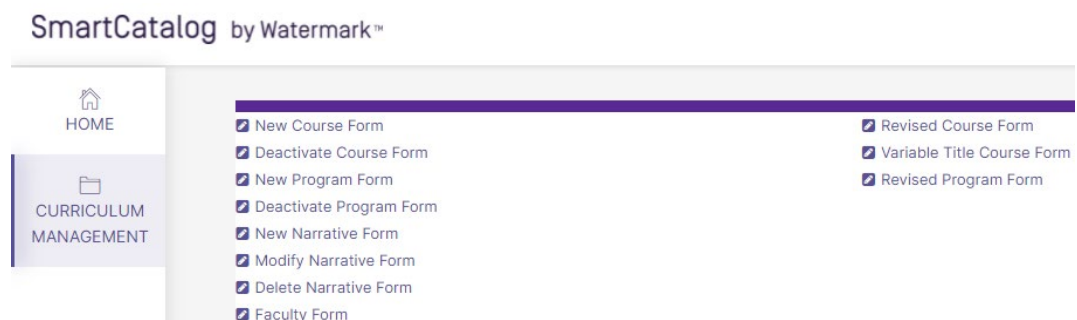
- i. *Workbox*: Emails sent to approvers/reviewers when something is ready for review.
- ii. *Originator*: Update emails sent to original submitters of curriculum to inform you of what stage your proposal(s) are in.
- iii. *Return to Submitter*: Update emails sent to original submitters of curriculum to inform you a proposal(s) has been returned for revision/review.

5) Curriculum Forms

- a. To begin a new form, first click “Curriculum Management” on the left side of the screen from the home page.



- b. All form options are at the top of the screen:



- i. New Course – use to submit new course for approval
- ii. Revised Course – use to make any revision to existing course

- iii. Deactivate Course – use to remove a course from catalog
- iv. New Program – use to submit new program (major, minor, etc.) for approval*
- v. Revised Program – use to make any revision to existing program, including description and admission information on program catalog page
- vi. Deactivate Program – use to remove a program from catalog
- vii. New Narrative – use to create new narrative page in catalog
- viii. Modify Narrative – use to modify existing narrative page/section in catalog (narrative are all non-curriculum items, such as department pages)
- ix. Delete Narrative – use to delete entire narrative page in catalog
- x. Faculty – use to revise faculty lists in catalog**
- xi. Variable Title – use to submit new subtitles to existing variable title courses for approval

*New Programs have additional requirements for approval prior to a curriculum form being submitted.

**Faculty names that are listed on department pages should be revised with a Modify Narrative form. Faculty forms are to revise full faculty list(s) on the [UNC Faculty](#) or [Affiliate Faculty](#) sections.

6) Curriculum Dashboard

- a. This tab will show all current, in progress curriculum proposals at UNC.
- b. Search in the box at the top left or within the “Name” field. Filter by College, Department, Type, Workflow stage, or sort alphabetically by clicking the table heading.
- c. Click on the hyperlink under “Name” to open the form.

College	Department	Type	Name	Workflow	Date	User
College of Performing & Visual Arts	Music	Change Course	MUS 348 Accompanying and Coaching I	Curriculum Committee	6/23/2021	Charles Hansen

7) My Items

- a. Must be logged in for items to show in this tab (if any).
- b. This tab will only show items for which you currently have access, such as: Drafts or items that were Returned to Submitter (for originators) or items currently in your stage for approval (for approvers/reviewers).

Workbox: Draft

Type ▼ Name

Modified Date From: To:

Modified By Submitted By

Locked By

SEARCH

Sort by: Type Ascending

- c. First, check the stage that is listed under “Workbox” in the upper left under the tabs – this will default to a stage that has items in it. If other stages are available, you may change the workbox in the drop-down to see other items at different stages.
- d. Then, if needed, a general search can be performed in the top search box. Other filtering and search boxes for each column are available underneath that. Finally, you can sort alphabetically (ascending, A-Z or descending, Z-A) by any of the columns.
- e. If you are an approver, you may see options to Select All or select multiple forms on the left. This will allow you to approve (or return if needed) curriculum items directly from the My Items tab rather than opening each form.
 - i. Please note: If you need to make changes, add comments, etc. each form will still need to be opened individually. This option can only be done within the same workbox (for example, if you have multiple areas you have approval authority for, each workbox will need to be opened separately).
 - ii. For example, the Curriculum Committee Chair (or designee) can approve all items that were discussed at the previous meeting once comments (as needed) have been added to each form individually:

Workbox: Curriculum Committee

Type ▼ Name

Modified Date From: To:

Modified By Submitted By

Locked By

SEARCH

Sort by: Type Ascending

<input checked="" type="checkbox"/> Select All	Type	Name	Modified Date	Modified By	Submitted By	Locked By
<input checked="" type="checkbox"/>	Change Course	MUS 348 Accompanying and Coaching I	6/23/2021	Charles Hansen	Carissa Reddick	
<input checked="" type="checkbox"/>	Change Course	MUS 604 Linear Analysis	6/23/2021	Charles Hansen	Carissa Reddick	
<input checked="" type="checkbox"/>	Change Program	Chemistry M.S. — Chemistry Emphasis Thesis Option	5/18/2021	Hua Zhao	Murielle Watzky-Brewer	
<input checked="" type="checkbox"/>	Change Program	Chemistry M.S. — Education Emphasis Thesis Option	5/18/2021	Hua Zhao	Murielle Watzky-Brewer	
<input checked="" type="checkbox"/>	Change Program	Chemistry M.S. — Chemistry Emphasis Non-Thesis Option	5/18/2021	Hua Zhao	Murielle Watzky-Brewer	
<input checked="" type="checkbox"/>	New Course	HUM 410 International Research Collaboration	5/10/2021	Andreas Mueller	Andreas Mueller	

Review Complete
Return to Submitter
Return to Director/Chair - Unit Review

Previous 1 Next

8) Archived Proposals

- a. This tab will show completed, approved curriculum proposals at UNC sorted by catalog year, plus denied proposals we are keeping record of.

- b. The view will default to the current curriculum cycle (the upcoming year’s catalog) but can be changed under the “Year” dropdown.
- c. To view denied proposals, click “Denied Proposals” in the dropdown.

Year

ARCHIVED PROPOSALS DRAFT DASHBOARD MY ITEMS CURRICULUM DASHBOARD

2021-2022
2022-2023
2021-2022
2020-2021
Denied Proposals

Show 10 entries

Department	Type	Name	Workflow	Date	Submitter
College of Education & Behavioral Sciences	Teacher Education	Variable Title	Approved	10/19/2020	Aimee Rogers

- d. For records regarding catalog/curriculum revisions made prior to the 2020-21 catalog, please contact the Office of the Registrar curriculum staff for assistance.

9) Submitting a Form

- a. Once the form is selected from the list of forms in Curriculum Management, most forms have a few standard options available.
 - i. Forms begin in the Workflow State “Unsubmitted.” Any changes made in “Unsubmitted” will be lost if the browser/form is closed.
 - ii. After opening the form (or after making your updates) click Save to move the form into the “Draft” state. You will now have options to submit the form for review or to remove the form from the system.
 - 1. Be sure to continue to save while working and/or prior to closing the form, as this is not done automatically. The form will need to be locked to you (Click “Lock” in the gray box underneath the form heading) in order to continue to click Save.
 - iii. Submit for Review
 - 1. Send for Review button will submit the form to the next stage to begin the approval process.
 - iv. Track Proposal
 - 1. Periodically, as the original submitter, you will receive email updates with the current location in the workflow of your form(s). Open the

Workflow State: Unsubmitted

[Print this form](#)

Save

There are 0 versions of this proposal

Workflow State: Draft

[Print this form](#)

There are 1 versions of this proposal

Send for Review

Remove Proposal

form to view new comments or changes (please note there are no notifications when a form is updated or a comment is added).

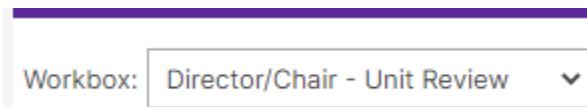
2. Login to the workflow at any time and filter or search for the proposal in “Curriculum Dashboard” – you will be able to see what stage the form is in and be able to open it to review it. If no results are found, be sure to check “Archived Proposals” – if it is listed as “Approved” in this tab, this means your curriculum form has been approved and processed. Changes should be visible in Banner and/or the Review Catalog(s).

10) Approving a Form

- a. If you approve curriculum, you have a few options to navigate to the proposals you need to approve.

- i. Emails: When a form is submitted to your stage and ready for your review, emails will be sent. Please note these emails are sent on a period schedule and not immediately.

- ii. My Items: If you prefer to check your proposals within the workflow rather than waiting for

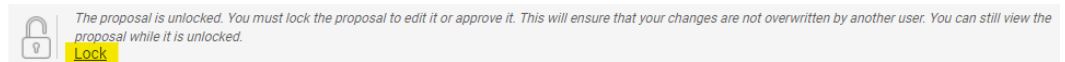


email notifications, you will want to navigate to the “My Items” tab. Be sure to check each “workbox” that you may have, for example, chairs/directors have 3: Director/Chair – Unit Review; Director/Chair – Final Approval; and Impacted Department.

- b. Making an edit

- i. When a form is in your workbox, you will have edit access if you are an approver. Certain curriculum roles, such as committee members, may have read-only access.
- ii. To make a revision to a form, please Lock the form by clicking the “Lock” link in the gray box at the top of the form

REVISED COURSE FORM



Helpful Links

- Curriculum Policy - University Regulations - Section 3-3-50
- Curriculum Help - Office of the Registrar

- iii. Once Locked (i.e., checked out to you), the gray box turns yellow and a Save button appears as an option on the left. Other users will not be able to make updates to the form while it is locked by you unless you click “Unlock.”

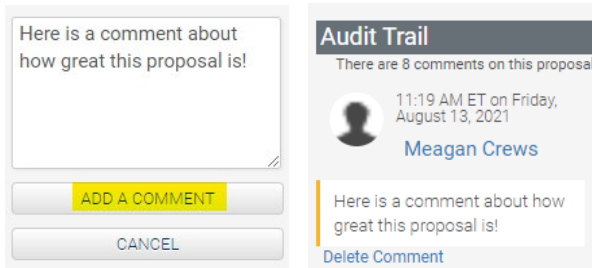
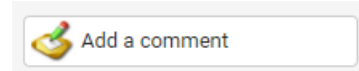
- c. Making a comment

- i. As an approver, there are a few ways to add comments to the form.
 1. Comment/Statement Areas in Form
 - a. Certain approvers/groups may have a special area of the form that they can use to add notes and comments. For example, LAC, PEC, and Impacted Department all have dedicated

locations for their information (these areas are optional – you may also opt to use the general comments function). In order to add comments to these special areas within the form, follow the directions above for editing/locking the form.

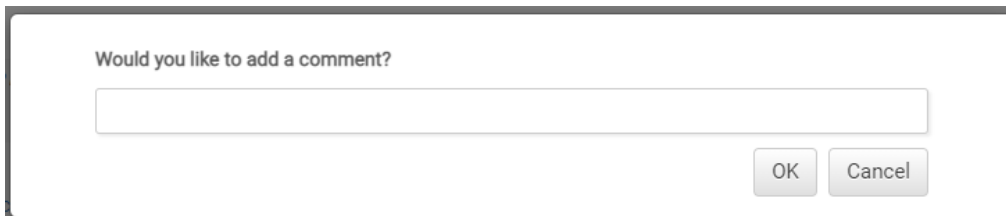
2. Audit Trail Comment: Add manually

- a. You can add comments as you are reviewing a form. To add a comment to the Audit Trail (note: these comments are public), click the “Add a comment” link under the approve/reject options. A text field will appear where you can type your comment. When done, click “ADD A COMMENT” again to save the comment. Comment will appear as the latest item in the Audit Trail.



3. Audit Trail Comment: Add when approving/rejecting

- a. Approvers will also be prompted to include a comment when they choose an approve/reject option. Add your comment and click “OK” (you may also skip the comment and just click OK to complete your form submission).



d. Approving the form

- i. To approve the form and send it to the next stage, you will see several buttons with green arrows on the left side of the form. These options will vary depending on your role and the workflow stage (see examples below). You will also see a variety of “Return to” options, in most cases. See the next section for information on returning a form to a previous stage.

Workflow State: Director/Chair - Final Approval	Workflow State: Curriculum Committee
Print this form	Print this form
Compare Versions There are 5 versions of this proposal	Compare Versions There are 3 versions of this proposal
Approve	Review Complete
Return to Submitter	Return to Submitter
Return to Curriculum Committee	Return to Director/Chair - Unit Review

11) Rejecting/Returning a Form for Revisions

- a. Return to XYZ
 - i. You will see options to return the form to a previous stage. It is recommended to include a comment when returning an item if you have additional information needed or if the proposal is no longer being considered. Please note per Board Policy college curriculum committees do not have veto power.
 - ii. Return to Submitter
 1. The “Return to Submitter” stage has a special function available – if changes or additional information is required, the original submitter will be able to provide this update and then return the form directly back to you by a “Return to Rejector” option (see next section). Any other stage will need to simply re-submit and the form will track back through all curriculum stages after that again.
 2. **Helpful Tip:** If you want to utilize the function above where the person makes a revision and is then able to send it back to you directly but would prefer the person revising/commenting on the change is someone other than the submitter (e.g., a chair/director or dean), you can first add that person as a Collaborator (see the “Add a Collaborator” button toward the top of the form). This will grant that person and the originator access to the “Return to Submitter” stage.

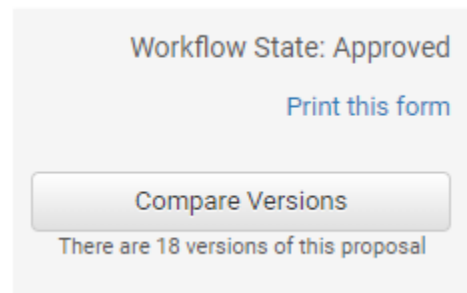
12) “Return to Submitter” stage

- a. A special stage is available when a curriculum approver sends a proposal back to the originator. This may occur if a proposal is being fully denied, or if they wish something to be revised/addressed and re-submitted. **This stage has a special function to return a proposal back to the person who rejected it.**
- b. Submission Options:
 - i. Remove Proposal
 1. Deletes proposal. Use if proposal was denied and should just be removed from the system.

- ii. Return to Rejector
 1. Resubmits the form directly to the stage that selected “Return to Submitter” – ideal for making an update or adding new information requested by a reviewer, then returning to them directly without going back through all curriculum approval steps.
- iii. Submit for Review
 1. Resubmits the form to the next step – the form will then go back through the curriculum review process from the beginning. This should be used for significant updates that need to be re-reviewed.

13) Compare Versions

- a. When reviewing a form, if you want to see changes made, click Compare Versions on the left in the form. This is available in any workflow state.
- b. At the top, there are two dropdowns to toggle between various versions of the form. It defaults to the first version – which will be the version created when the form was saved – to the final version and will therefore show all changes between the original and final versions.



Select Version to Compare

Select Current Proposed Version

- c. Throughout the page, you will see mark-up of changes made. At the top is the key to the color coding showing throughout.

Compare Key

- New Section ABC New/Modified Text
- Deleted Section ABC Deleted Text

Catalog Course Title	Learning Strategies for ASL English Interpreting Majors Interpretation Success
Banner Course Title	Learn Strategies for ASLEI Maj Success

- i. In the above example, the title changed from “Learning Strategies for ASL English Interpreting Majors” to “Strategies for ASL English Interpretation Success” where you can see the added (red) and deleted (blue) words.

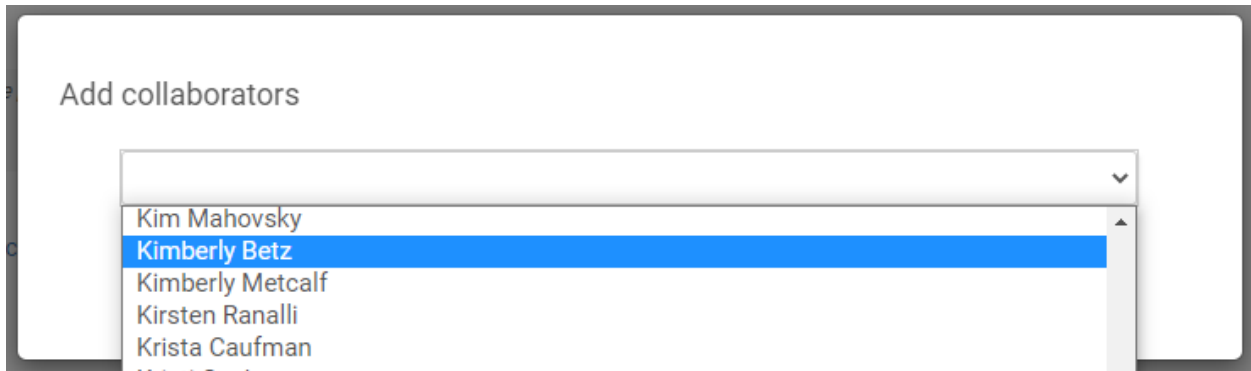
- d. If wanting to see only changes made by a particular user or at/after a particular stage, select different versions to compare. Only changes made between the first and second versions selected in the dropdowns will appear.

14) Add a Collaborator

- i. If you have additional UNC faculty or staff that will assist or would like to review the curriculum prior to submission, you may add others as a Collaborator to give them access to your form while it is in Draft.
 1. Click Select Collaborator(s) toward the top of the form.
 2. Choose individuals from the list (these are alphabetical by first name) and then select the button that populated with their name.

Add collaborators

Select Collaborator(s)



Add collaborators

Kimberly Betz

Kimberly Betz

Cancel

- 3. The collaborator will now appear at the top of the form. You can remove them by clicking the “Remove” button or add additional collaborators with the “Select Collaborator(s)” button again.

Add collaborators

Select Collaborator(s)

Kimberly Betz

Remove

- 4. Collaborators are now treated as additional originators of the proposal. They will:
 - a. Be able to edit, save and submit items in “Draft” or “Return to Submitter” stages.

- b. Receive email updates of curriculum progress after submission.
- 5. FAQ: What if the user I want to add is not in the list?
 - a. Faculty/staff member needs to have an active account in the Curriculum Workflow. Signing in via Ursa the first time will automatically create an account. If the user has done this and you still do not see them after refreshing the form (make sure to Save first!) contact the curriculum staff in the Office of the Registrar.
- 6. FAQ: Can I add a collaborator to other stages for approval access?
 - a. No, collaborators are just granted access to Draft and Return to Submitter. Contact the curriculum staff in the Office of the Registrar if changes are needed for approvers.

15) Curriculum Help

- a. If you need assistance with curriculum, there are several resources available.
 - i. [Help Sheets](#) (Office of the Registrar website)
 - ii. [General Curriculum Information](#) (Office of the Registrar website)
 - iii. [Liberal Arts Curriculum course proposals](#) (Liberal Arts Council Website)
 - iv. [Professional Education Council program/course review](#) (PEC Website)
 - v. Helpful Contacts
 - 1. Meagan.Crews@unco.edu (general curriculum assistance; training; curriculum workflow assistance)
 - 2. Kimberly.Betz@unco.edu (general curriculum assistance; curriculum workflow assistance)
 - 3. College Dean’s Office (Scheduler or BOM) for information about college deadlines, curriculum committee information, and general curriculum assistance
 - 4. College Dean for guidance on curriculum such as development of new courses or programs
 - vi. Helpful information directly in Workflow
 - 1. Throughout the forms, you will see notes in italics under certain fields.

Internal Impact Statement **Required*

Include impact both within and outside of the originating unit (academic, resources, equipment, supplies, etc.).

- 2. In addition, some fields contain longer explanations that can be opened, denoted with a question mark next to the field name. For example, to see the definition of Major / Minor change from policy, click the popup next to the “Change Type” field:

PROPOSAL INFORMATION

Required information regarding the curriculum change being requested.

Change Type 

Major



A popup will appear with more information:

New courses are always a "major" change.

Minor Change: A change which will have a minimal impact on any student's program and does not affect other units.

Only the following are minor changes:

(A) Changes in standard codes (except for changes in course fees).

(B) Dropping prerequisites.

(C) Changes in title and/or catalog description that does not alter the basic nature of the course program.

(D) Deletion of a course not required in other programs.

(E) Adding prerequisites that are internal to the unit and do not change the number of credit hours in the program.

Any curriculum change not listed as a minor change is considered a major change.

From 3-3-501(2) Curriculum Change Procedures in University Regulations.

OK