Curriculum Manager Introduction for Administrators

CM is the course and program management tool which enables University faculty and authorized individuals to make proposals to the appropriate committees and be able to track their proposal through the approval process. The review process (aka workflows) are already established within CM so that the various proposals are automatically routed through the proper committees. There are three types of proposals:

- Course or Program
- New or Revised
- Non-Substantive or Substantive

Each proposal is created by a dynamic web form that ensures the relevant committees have the exact information needed to conduct their reviews. CM guides each proposal through the appropriate workflow to allow the relevant individuals and committees to review, provide comments, revise, rollback, and eventually take final action on the proposal (edit, rollback, or approve).

As a CM Admin, you will be the point of contact for your school/division regarding questions and maintenance, and you will have access to more enhanced functions that will help facilitate proposals.
through workflows. System Administrators (SysAdmins) from the Office of the University Registrar will support your efforts by maintaining steps in workflows, assisting with CM Admin role assignments, and updating the Student Registration Systems (SRS).

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**Role Maintenance**
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**Updating User Roles**
User roles within an assigned school may need to be updated to account for employment changes, intraschool transfers, or rotation of department chairs. To update a user role:

1. Select the desired role from the **Roles** list.

2. To the right, members will populate
   a. Add or remove a member from the selected role.
      i. To **add** a member, click 🔄 and enter their ID in **lower case letters**.
         1. If you use capital letters, the name will appear, but the role will **fail** the associated workflow step (i.e., no notification will be sent and the proposal will get stuck at that step).
      ii. To **remove** a member, click ✗.
NOTE: The first person listed will get email notification when a proposal is assigned to that role. In the example shown above, Alison Feather would be the only person to receive an email.

3. If you want multiple members of a role to receive an email when a proposal is assigned, perform one of the following actions:

   a. **All Members:** To ensure all members in a role receive email notifications, type “all” into the Email field.

   b. **Specific Members:** If you only want certain members in a role to receive email notifications, enter the desired members’ email addresses, with each email address separated by a “;”. These email addresses can include list-serv addresses as well as people who are not members of the role list.
Updating CM Admin Roles
To change who is in the CM Admin role for each School, you must submit a JIRA ticket so the SysAdmins can make the necessary changes.

- **SUBJ Admin** = the admin who is contacted in cross-list FYI email.
  - Whoever is listed in **SUBJ Admin Role** will be the individual notified when **SUBJ** department is added in ‘Also Offered As’ field (i.e., their subject is being added as a cross-listed department for a course).

Updating School Roles
Creating New Roles
To create a new role within a School:

1. Click 📜.
2. Name the role. Make sure to use the same naming convention as other departments (e.g., COMM Admin, HIST Admin, AN Admin, etc.).
3. Submit a JIRA ticket to the CM Support Team so the new role can be added to the appropriate workflow.

Removing Roles
To remove a role from a School:
1. Select the desired role and click ✗ .
2. Adjust the workflow via JIRA ticket (see workflow aid). If you do not adjust the workflow, the workflow will fail at the step that was removed (no notification will be sent to the assigned role).

Changing Workflows
To create, delete, or edit a workflow, submit a JIRA ticket to the CM Support Team.

Admin Save
- It is strongly advised to include comments and/or rationale to document why the submission is bypassing the defined workflow
- Admin Save bypasses workflow (except in courses, goes to SisSync step for systematic-overnight process)
  - Programs just goes to ‘rest’

Shred Proposals
- Shred should only be used for ‘stale’ proposals
  - Permits that course ID to be used in a future instance (ie. Faculty Member A proposes ACCT 201 but never finishes proposal, Faculty Member B can’t propose a course using ACCT 201 until CM Admin shreds existing proposal from Faculty Member A)
  - Information is saved in CM Data Warehouse (NOT application)
    - History is saved and can be retrieved when needed

Updating Workflow in progress
- Found in top right of Pages Pending Approval page
Adding a step or individual to a workflow already in progress

- In order to make an addition to a workflow-in-progress, the proposal must be re-generated (aka rolled back to submitter) to ‘refresh’ the recognition of added step and properly move through the temporary edited workflow
- ID is case-sensitive and must be typed exactly in order for step/role to be recognized in workflow (ie. ‘mktg admin’ doesn’t work; **must** be ‘MKTG Admin’)

Archive Courses

- Archive hyperlink is visible once a course has successfully finished the Deactivation workflow
  - That number can now be used for ‘anything’
    - MUST be archived to ‘recycle’ back in for offering within a short amount of time
    - Recommend leaving course in Deleted status so it cannot be reused and is cycled out of student history
Reactivate

A course or program can be reactivated and re-enter active offerings with its same former identity.

Deleting comments from proposals

- Comments are found at the bottom of proposals
- Can be deleted from proposal
  - Will no longer be part of a proposal's history in the CM data warehouse

CM Admin notes

- In addition to the functions described, being in the CM Admin role ensures that you will receive notification for any cross-listed courses that are crossed between your school and another school.

JIRA information

- Login to Jira by going to https://jira.apps.upenn.edu/jira/projects/CS/summary.
- You will need to use your Penn Key credentials to login.
- All CM support items may be logged in the CAT/CM Support (CS) project.
- Please review the CAT/CM Support JIRA Quick Reference Guide, located at https://srfs.upenn.edu/faculty-staff-resources/cm