

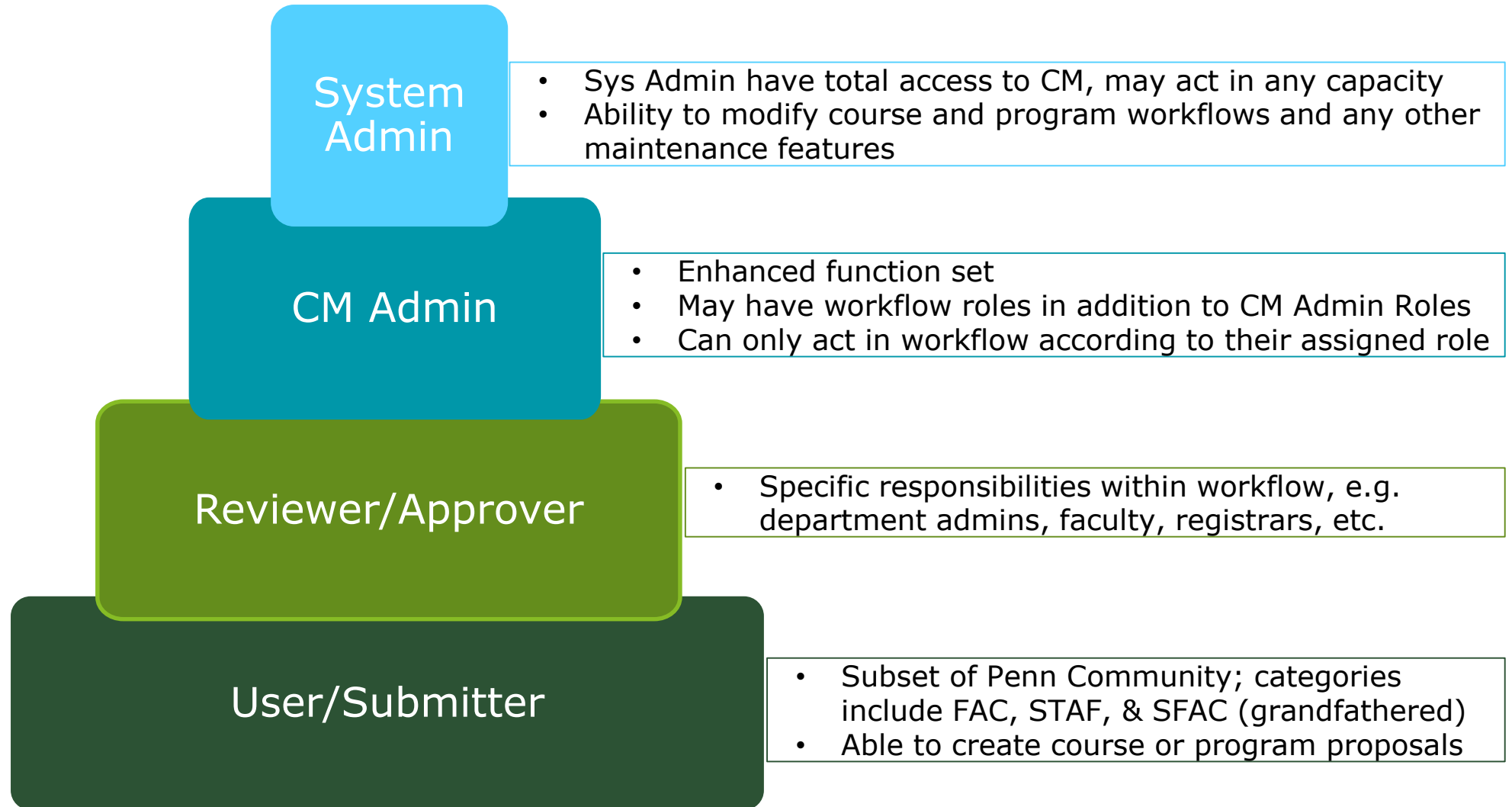
Curriculum Manager Admin Training

Pennant Records
University of Pennsylvania

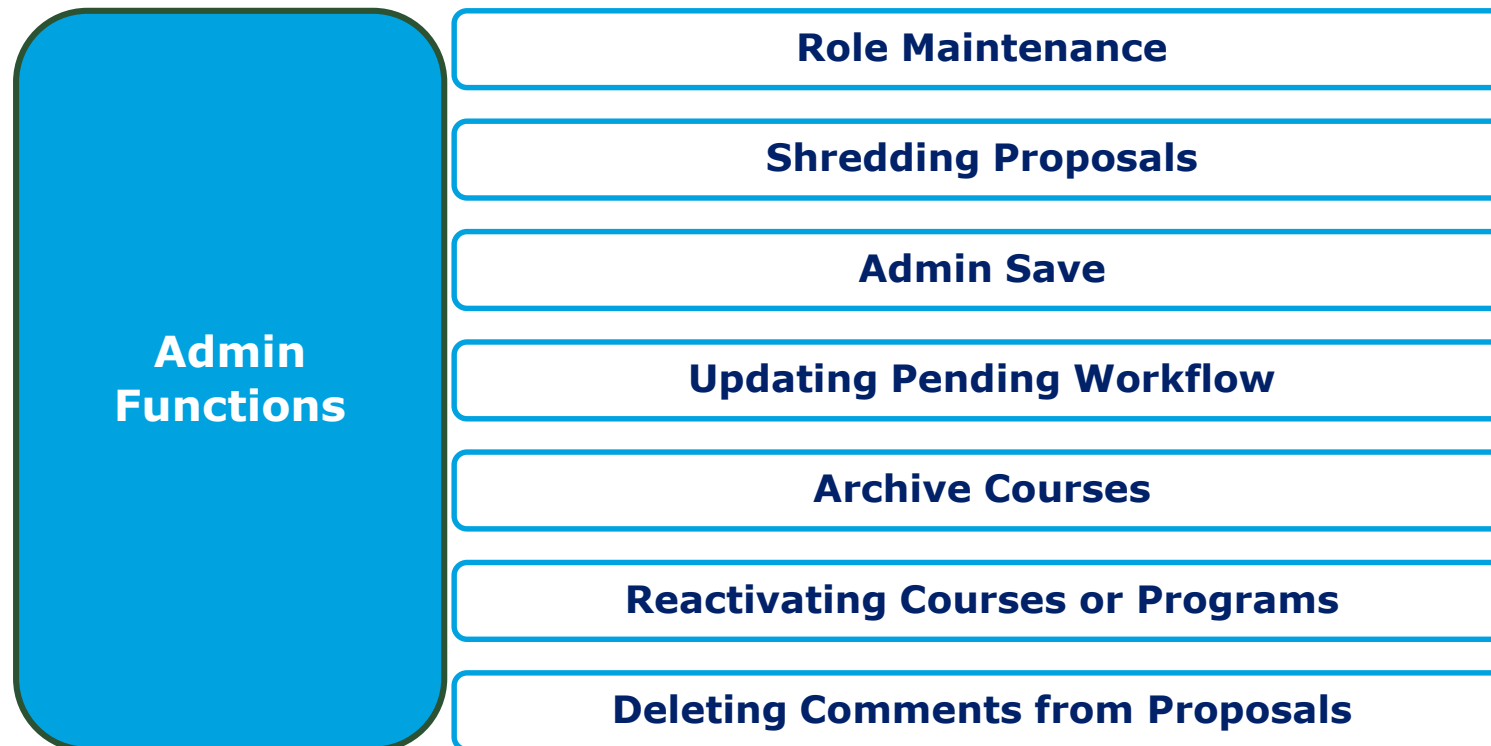
August 2021





Curriculum Manager Roles





As CM Admin for your school/division, you will have more functions and responsibilities that will enhance the workflow process for curricular changes. These functions include:

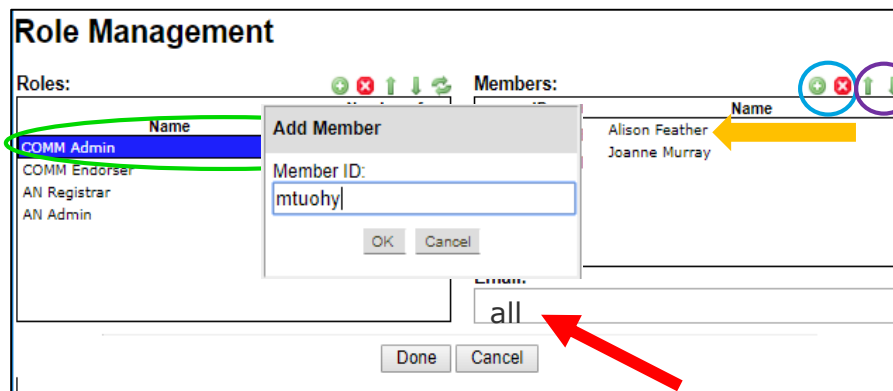


Update existing role

- Used for employment changes, rotation of department chairs or other shifts in duties
- Highlight role in which edits are to be made
- Use  or  to add or remove members from the selected role
- When adding a user, you must enter that user's PennKey ***in all lower case***

Note: only the first person listed will get an email notification when proposal hits that role

- E.g. Alison Feather would only get email in above situation
- To change order, use the ranking arrows  
- You may opt to have all assignees receive notification by entering 'all' into the email list. That would ensure that that all members listed in the Role would get email



Role Management

Roles:

Name	Number of Members
COMMM Admin	5
COMMM Endorser	5
AN Registrar	1
AN Admin	2



Members:

Name
Alison Feather
Joanne Murray

Member ID: mtuohyl

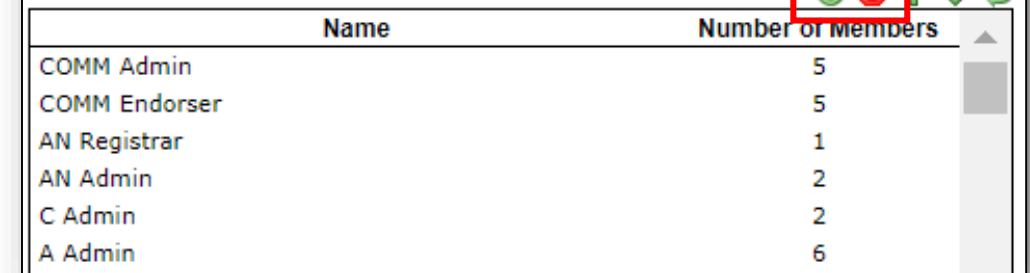
all

Remove existing or create new role

- Use the  tool to add a new workflow role; be sure to use the same naming convention as pre-existing role
- Use the  tool to remove an existing workflow role.
- All changes must be coordinated in advance with the Penn support team
 - Sys Admins need to update workflow structure to include/remove roles, otherwise the workflow will fail

Role Management

Roles:



Name	Number of Members
COMMM Admin	5
COMMM Endorser	5
AN Registrar	1
AN Admin	2
C Admin	2
A Admin	6

Shred Proposals

- Found on any proposal in edited state or in workflow
- Shred should only be used for 'stale' proposals
- Release that course ID for future use
- Course record saved in data warehouse, not in application

Admin Save

- Admin Save bypasses workflow (except in courses, goes to SisSync step for systematic-overnight process)
 - Programs just go to 'rest'
 - Can only be done from initial submittal screen
- Best practice would be to add a comment stating the rationale as to why this action was taken.



AAMW 5120 Petrography of Cultural Materials edited

AAMW 5190 Ancient Greek Colonies edited

AAMW 5200 Ancient Prose Age Seminar

Export to PDF

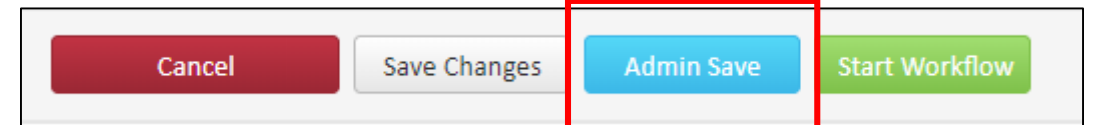
Export to Word

Shred Proposal

Changes saved but not submitted

Edit Course

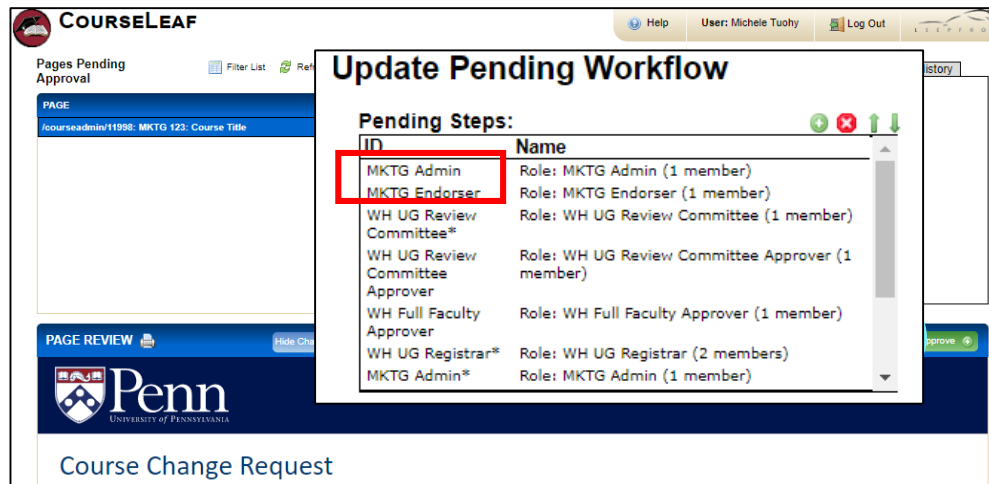
Preview Workflow



Cancel Save Changes **Admin Save** Start Workflow

Update pending workflow

- Available in the Pages Pending Approval form
- Changes made to workflow already in progress are only for that proposal
- In order for an addition to a workflow-in-progress to work, the proposal must be re-generated (aka rolled back to submitter) to 'refresh' the recognition of the added step
- ID must be typed EXACTLY so step/Role will be recognized in workflow (e.g. *mktg* admin doesn't work; must be **MKTG** Admin)
- Removing a pending workflow step does not require a rollback

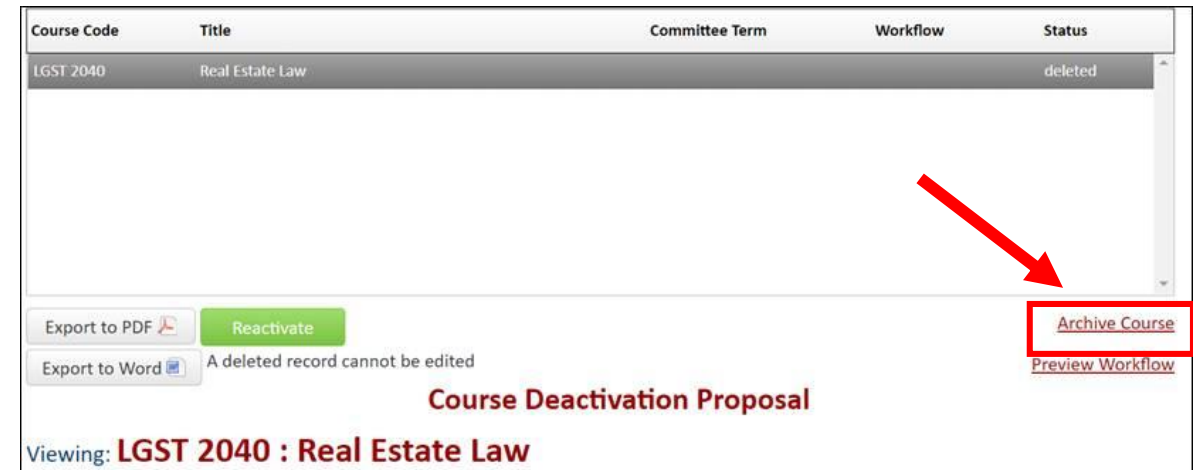


The screenshot shows the COURSELEAF interface for updating a pending workflow. A modal window titled "Update Pending Workflow" is open, displaying a list of pending steps. The "MKTG Admin" and "MKTG Endorser" roles are highlighted with red boxes. The background shows a "Pages Pending Approval" form for a course change request.

Pending Steps:	
ID	Name
MKTG Admin	Role: MKTG Admin (1 member)
MKTG Endorser	Role: MKTG Endorser (1 member)
WH UG Review Committee*	Role: WH UG Review Committee (1 member)
WH UG Review Committee Approver	Role: WH UG Review Committee Approver (1 member)
WH Full Faculty Approver	Role: WH Full Faculty Approver (1 member)
WH UG Registrar*	Role: WH UG Registrar (2 members)
MKTG Admin*	Role: MKTG Admin (1 member)

Archive Courses

- Once a course is deactivated (finished Deactivation workflow), there will be a link to Archive the course
 - Archiving a course means it will be able to be 'recycled' for use as another course offering
- Course numbers can NOT be reused without first being archived



The screenshot shows the COURSELEAF interface for a course deactivation proposal. A table lists the course details, and a red arrow points to the "Archive Course" link in the bottom right corner. The interface also includes buttons for "Export to PDF", "Reactivate", and "Export to Word", along with a message stating "A deleted record cannot be edited".

Course Code	Title	Committee Term	Workflow	Status
LGST 2040	Real Estate Law			deleted

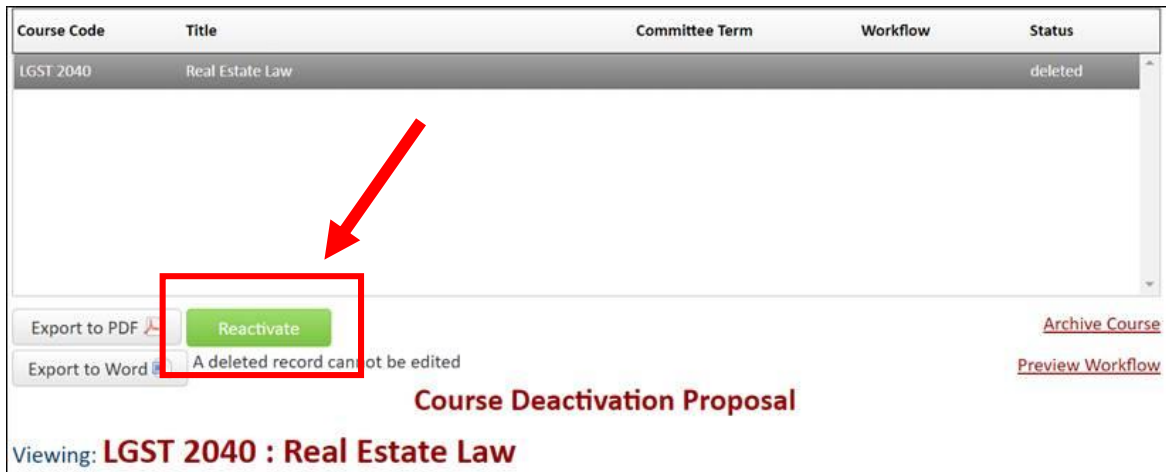
Export to PDF Export to Word [Preview Workflow](#)

Course Deactivation Proposal


Viewing: **LGST 2040 : Real Estate Law**


Reactivate Courses & Programs

- Reactivate a course/program that has been deactivated
 - To bring back a course/program with its same identity and content as it when it was deactivated



Course Code	Title	Committee Term	Workflow	Status
LGST 2040	Real Estate Law			deleted

Export to PDF  [Reactivate](#) [Archive Course](#)

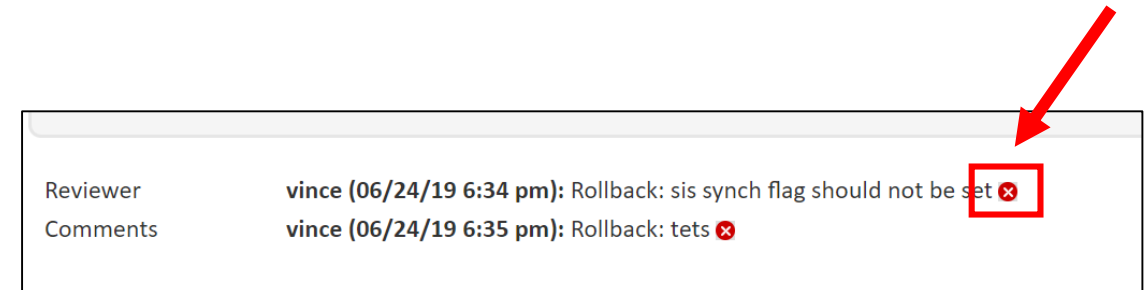
Export to Word  A deleted record cannot be edited [Preview Workflow](#)


Course Deactivation Proposal


Viewing: **LGST 2040 : Real Estate Law**

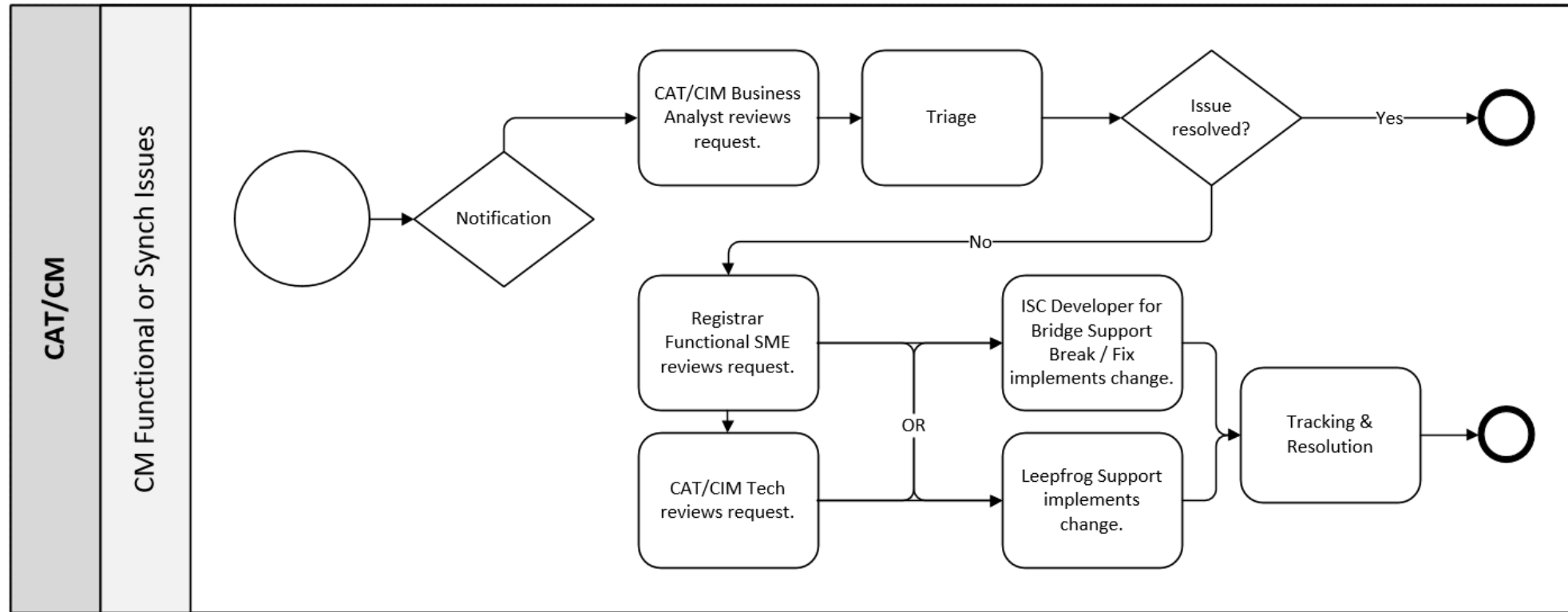
Delete Comments

- Comments may be removed by the CM Admin
- Comments are found at the very bottom of proposals
- After deletion, comments will no longer be part of a proposal's history

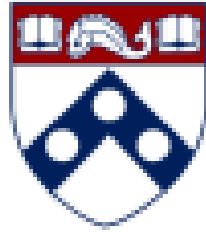


Reviewer vince (06/24/19 6:34 pm): Rollback: sis synch flag should not be set 

Comments vince (06/24/19 6:35 pm): Rollback: tets 



- CM Admins provide local assistance and are the first line of support for their school/division
- CM Admins contact CM Support Team for functional requests (e.g. updating workflow roles) or any other issues that require SysAdmin or vendor assistance



Curriculum Manager Admin Training

Thank you for your time and attention!

You have completed the CM Admin Training!

If you have any questions, please contact:

- **Michael Peterson (mipet@upenn.edu)**
- **Michele Tuohy (mtuohy@upenn.edu)**