

# CM Quick User Guide

## Contents

Curriculum Manager Introduction for Administrators.....	2
Role Maintenance .....	2
Updating User Roles.....	2
Updating CM Admin Roles.....	4
Updating School Roles.....	5
Creating New Roles .....	5
Removing Roles.....	5
Changing Workflows .....	5
Admin Save .....	5
Shred Proposals.....	5
Updating Workflow in progress.....	6
Archive Courses.....	7
Reactivate .....	7
Deleting comments from proposals.....	8
CM Admin notes.....	8

## 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).

**NOTE:** As a CM Admin, you will only be able to update information/roles within your designated school/division.

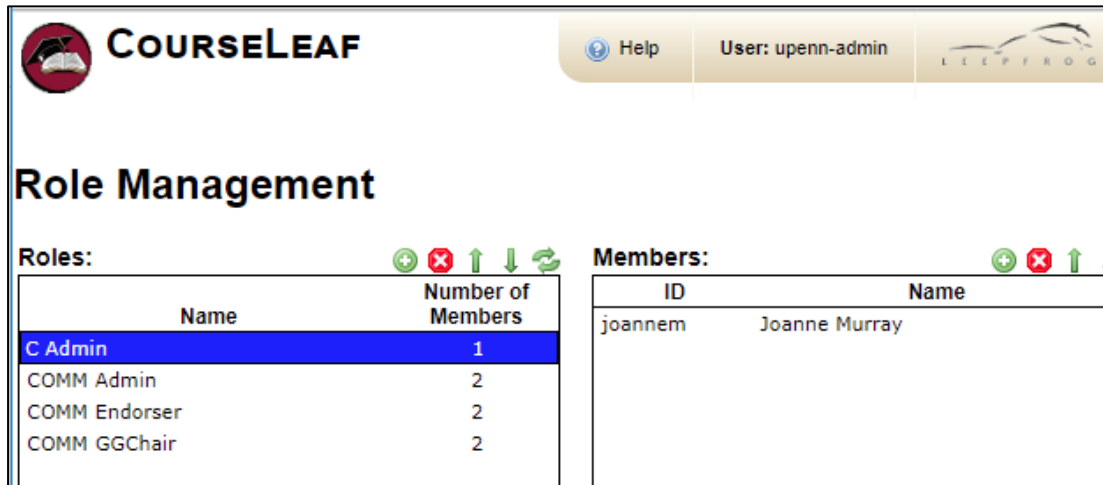
## Role Maintenance

- **NOTE:** As a CM Admin, you will only be able to update information/roles within your designated school/division.

## 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.





**Role Management**

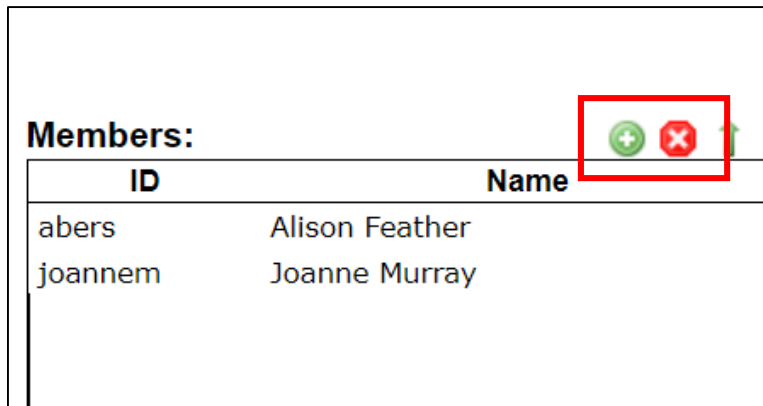
**Roles:**

Name	Number of Members
C Admin	1
COMM Admin	2
COMM Endorser	2
COMM GGChair	2

**Members:**

ID	Name
joannem	Joanne Murray

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 .



**Members:**

ID	Name
abers	Alison Feather
joannem	Joanne Murray

**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.

**Members:**
+ × ↑ ↓

ID	Name
stephanr	Stephanie Jones
peterman	Kent Peterman
dunnr	Richard Dunn
marvel	Edward Marvel
mmcglone	Molly Mcglone

**Email:**

- 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.

**Members:**
+ × ↑ ↓

ID	Name
marvel	Edward Marvel
stephanr	Stephanie Jones
peterman	Kent Peterman
mmcglone	Molly Mcglone

**Email:**

## Updating CM Admin Roles

To change who is in the CM Admin role for each School, you must contact the CM Support Team 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 (ie. 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  .

**Role Management**


Roles:     

Name	Number of Members
C Admin	1
COMM Admin	2
COMM Endorser	2
COMM GGChair	2

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. Contact 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. 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, contact 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'

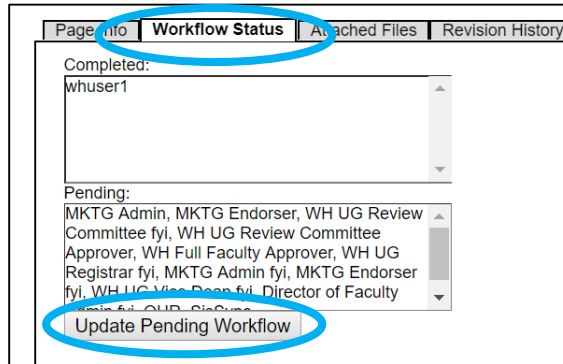
### Shred Proposals

- 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



## Update Pending Workflow

**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)


**Note:** Email will not be sent if first user in the Pending Workflow is changed.  
The first user in the Pending Workflow list should not be updated to an FYI/To-Do work.  
Changes made to the Pending Workflow apply to this approval cycle only.


OK Cancel

- 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

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

Export to PDF  [Reactivate](#)

Export to Word  A deleted record cannot be edited


[Archive Course](#)


**Course Deactivation Proposal**

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

- 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

Export to PDF  [Reactivate](#)

Export to Word  A deleted record cannot be edited

[Preview Workflow](#)

**Program Inactivation Proposal**

Viewing: **English: 20th/21st Centuries, BA**

Last approved: 07/19/19 1:24 pm

Last edit: 07/09/19 12:16 pm

Catalog Pages Using

**History**

1. Jun 7, 2018 by clmig-jwehrheim
2. Jul 8, 2019 by asuser2
3. Jul 19, 2019 by

- A course or program can be reactivated and re-enter active offerings with it's same former identity

## Deleting comments from proposals

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 ❌

- 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.