

USF Curriculog – Office Approval Workflow Process

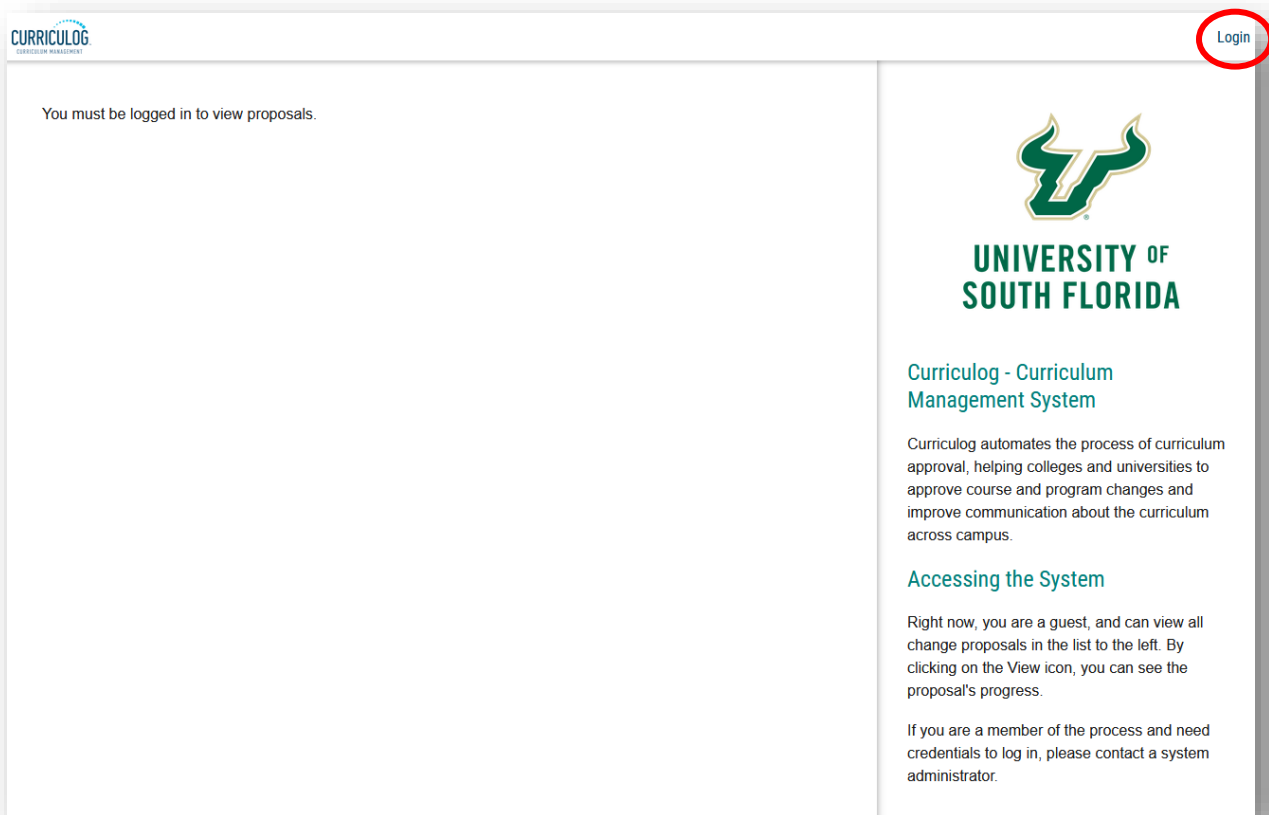
Welcome to the University of South Florida's Curriculog Office Approval Workflow Process tutorial. This tutorial will provide information on how an Office for a General Education or HIP attribute moves a proposal in the Curriculog Approval Workflow Process.

UGS Curriculum Website Training screen

To learn more about Curriculog and the proposal system, visit the USF Undergraduate Studies Curriculum website at <https://www.usf.edu/ugs-curriculum-training>. Tutorials on Curriculog Navigation, Course Proposals, Course and Curriculum Proposals, and the approval workflow process, as well as resources for the proposal system can be found here.

For more assistance, please contact the Undergraduate Studies Curriculum team at UGS-DOCurriculum@usf.edu.

To optimize the Curriculog experience, it is best to use Firefox or Chrome as your browser. You can access the Curriculog system at <https://usf.curriculog.com/> and click the login button. USF has a single signer login meaning.



The screenshot displays the USF Curriculog website interface. In the top right corner, a "Login" button is circled in red. The main content area is split into two columns. The left column contains the text "You must be logged in to view proposals." The right column features the USF logo, the text "UNIVERSITY OF SOUTH FLORIDA", and a section titled "Curriculog - Curriculum Management System". Below this title, a paragraph describes the system's purpose: "Curriculog automates the process of curriculum approval, helping colleges and universities to approve course and program changes and improve communication about the curriculum across campus." A sub-section titled "Accessing the System" provides instructions for guests and members. The "CURRICULOG" logo is visible in the top left corner.

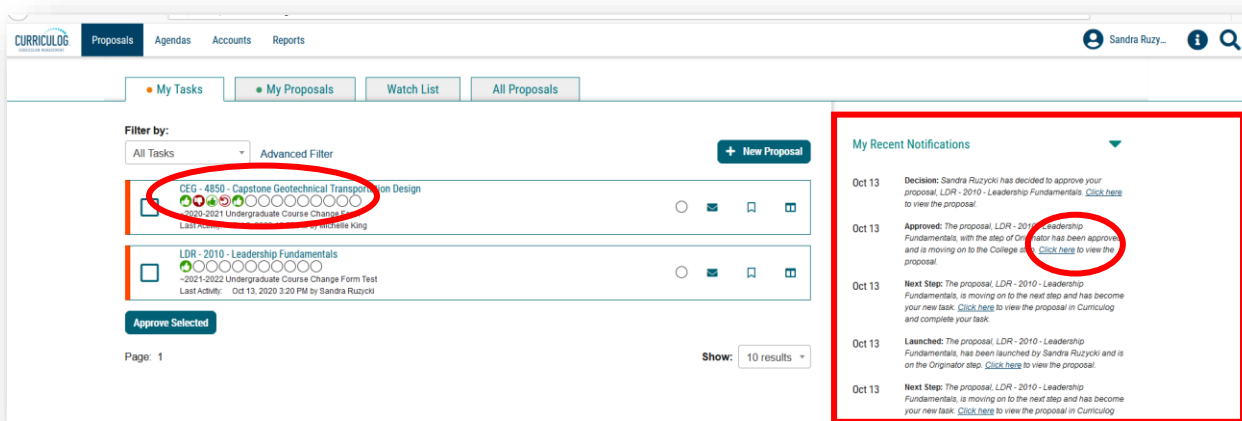
Accessing the Proposal in Curriculog

After the proposal has been approved at the steps prior to the “Office,” those individuals who have been identified in Curriculog as Office-level approvers will receive an email notification from Curriculog indicating a course proposal is now at the Office step. Only one person needs to make a decision in the approval workflow process.

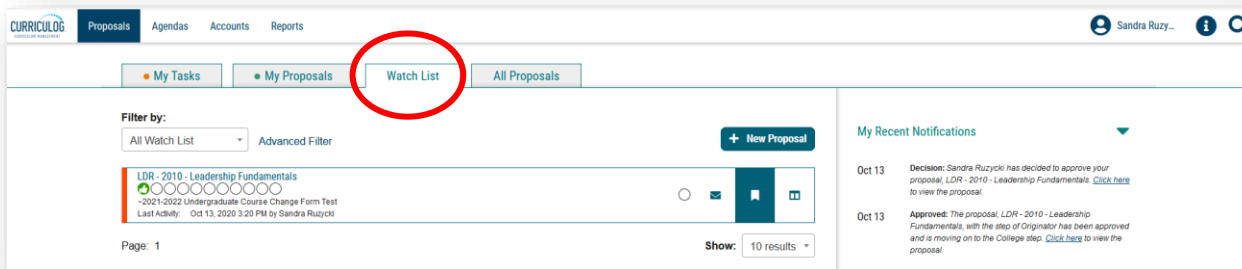
The Office Review occurs before the proposal goes to the Undergraduate or General Education Council for review. There are Office-level reviews for Global Citizens Project, Undergraduate Research, Community Engaged Learning, Study Abroad, and Internship for their associated General Education and High Impact Practice (HIP) attributes.

Once the Office approver logs into Curriculog, they will see a notification on the right side of the dashboard, stating the proposal is ready for review and approval. A link is provided to the proposal which can be clicked to display the proposal.

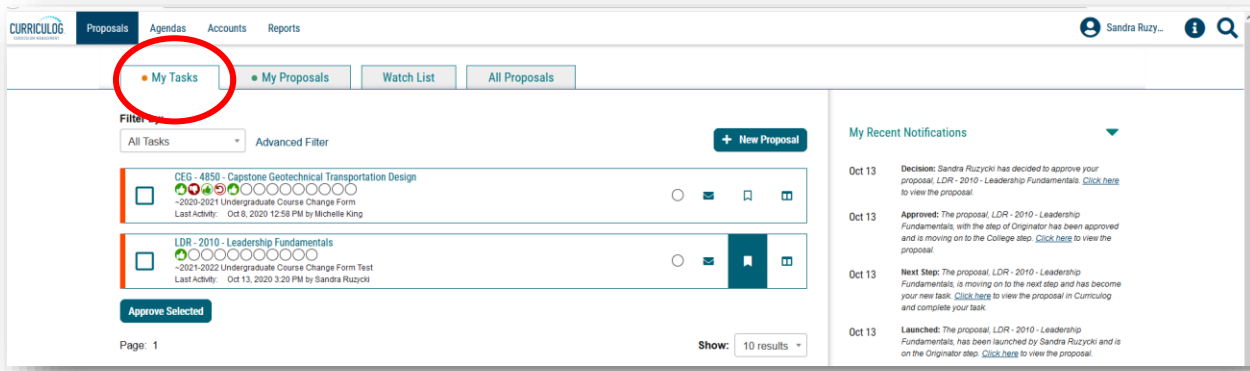
The circles under the title of a proposal indicate where a proposal is in the approval workflow process. You can mouse over these circles to see the status of the proposal.



There are two additional ways to view a proposal. You may have placed the proposal on your “Watch List.” You can go to the “Watch List” tab and find the name of the proposal there. Clicking the title of the proposal will open the proposal in the Curriculog dashboard.



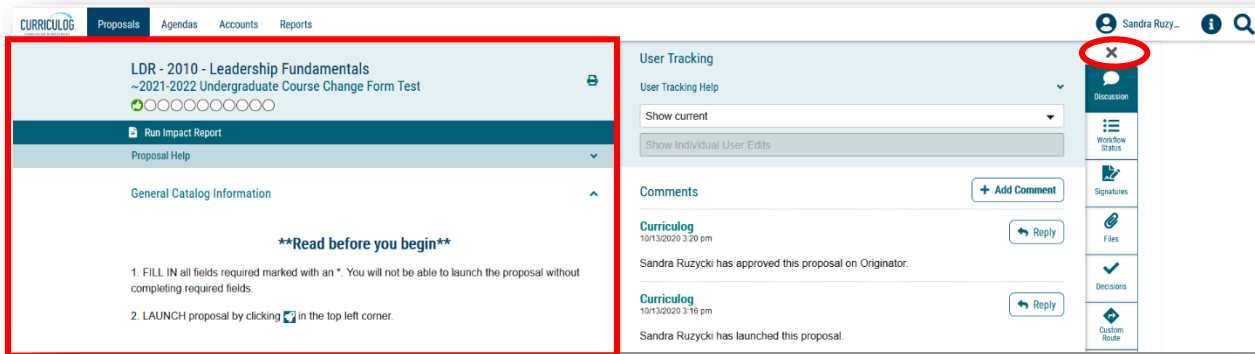
Or you can go to the “My Tasks” tab and view the proposal. Proposals in the “My Tasks” listing are in the Office queue for review in the approval workflow process. Once you see the proposal in either the “Watch List” tab or the “My Tasks” tab, you will click on the title of the proposal to open it.



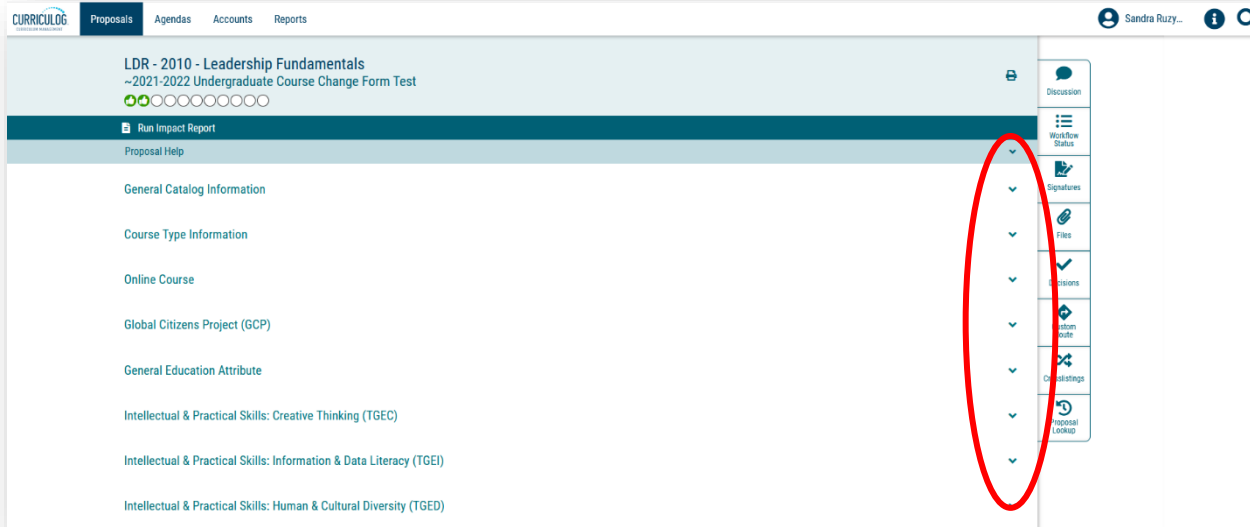
The proposal will be displayed on the left side of the dashboard. The right side of the dashboard will display the tracking of the proposal, along with a series of administrative icons. At this time, you will close the right side of the dashboard by clicking the X at the top of the icon list.

The first step at the Office-level is to scroll down on the form to find the “Office Review Only” section for your area. To make this easier, click the arrow to right of each section title to collapse that section.

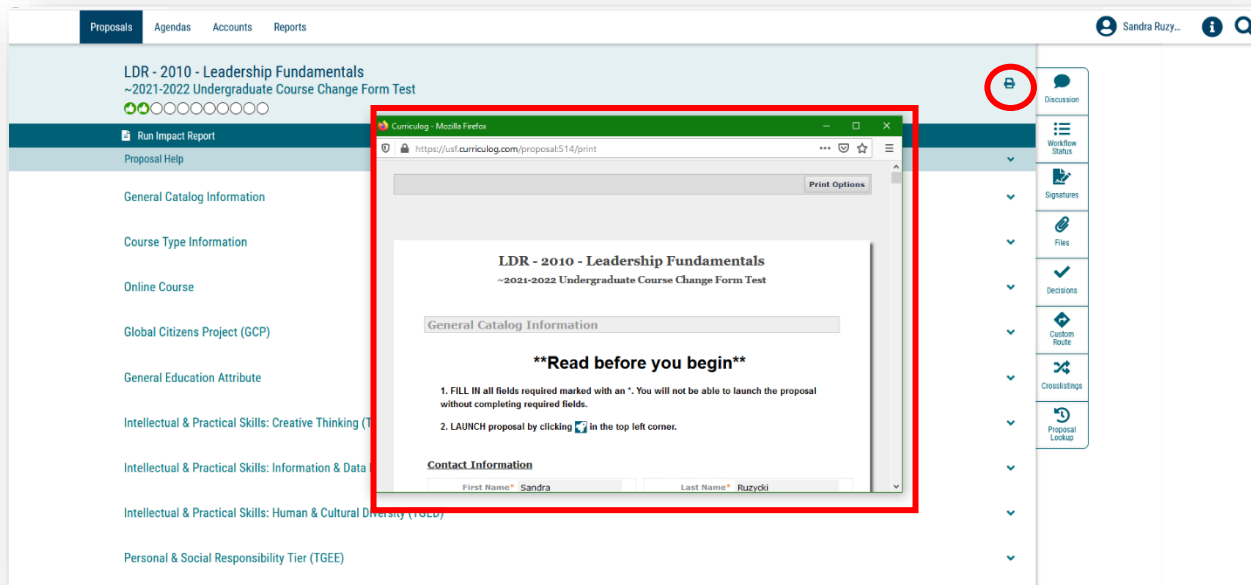
The sections for the different “Office Reviews” come after the “College Review Only” section on the Proposal.



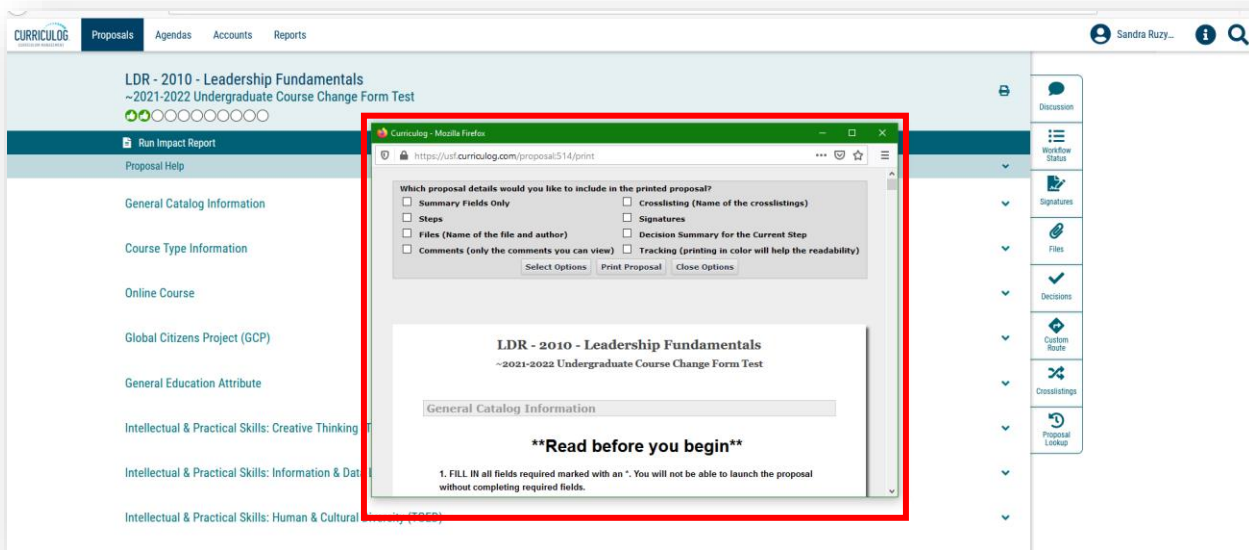
Any section can be opened by clicking the arrow to the right of the section heading. In this way, the Office-level reviewer can view the specific information for that section and complete the associated fields in the “Office Review Only” section.



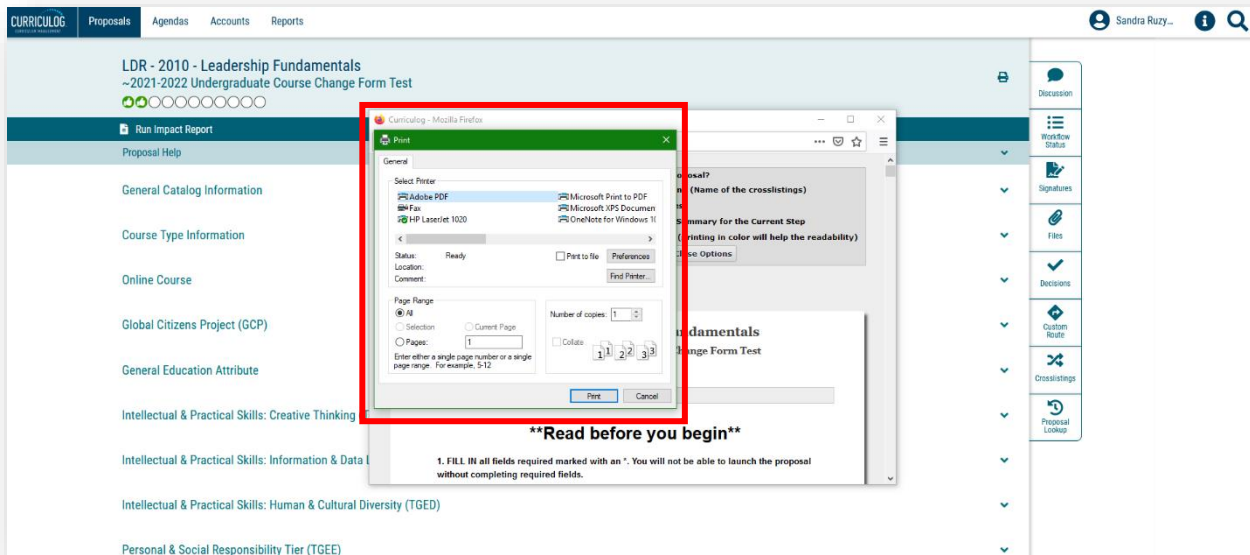
In addition, the Proposal can be printed or saved as a .pdf file. Click the “Printer” icon in the top right of the proposal. A secondary window will open. Click the “Print Options” in the top right of the print window.



The secondary window will change to display a list of “Print Options.” You can click any of the options and/or select the “Print Proposal” button under these options.



Another window will open with the selections to print the proposal to a printer, save or print as a .pdf file, or other options. You will make your selection in this window, and then close these windows to return to the proposal.



Completing the “Office Review Only” Section

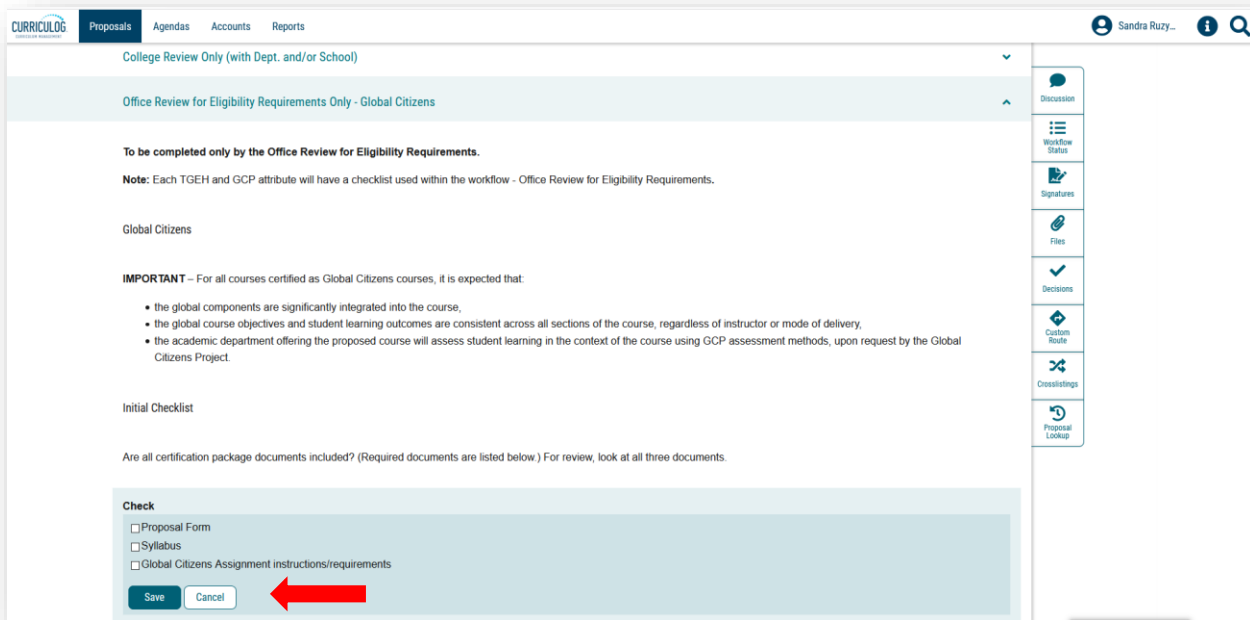
The “Office Review Only” section is completed by the Office prior to making a decision in the approval workflow process. While the Office may have an internal process for review of proposals, the information in the “Office Review Only” section is used by subsequent steps in the approval workflow process.



In the specific “Office Review Only” section, the Office will respond to items and provide comments in the fields on the proposal. There are a number of areas for which the Office will make decisions and add comments. The Office responses in these areas assist the Proposer (or “Originator” in Curriculog-speak) make revisions if requested. In addition, the Office responses will help the next steps in the approval workflow process in their review of the proposal, such as Undergraduate Studies and the Undergraduate Council or General Education Council.

All comments made in Curriculog are visible to the subsequent steps, as well as to other Curriculog users. If comments need to be made directly among the Office reviewers, the department or college, and/or the proposer, those should be done outside of Curriculog. However, comments which aid decisions for the next steps in the approval workflow process should be included on the proposal.

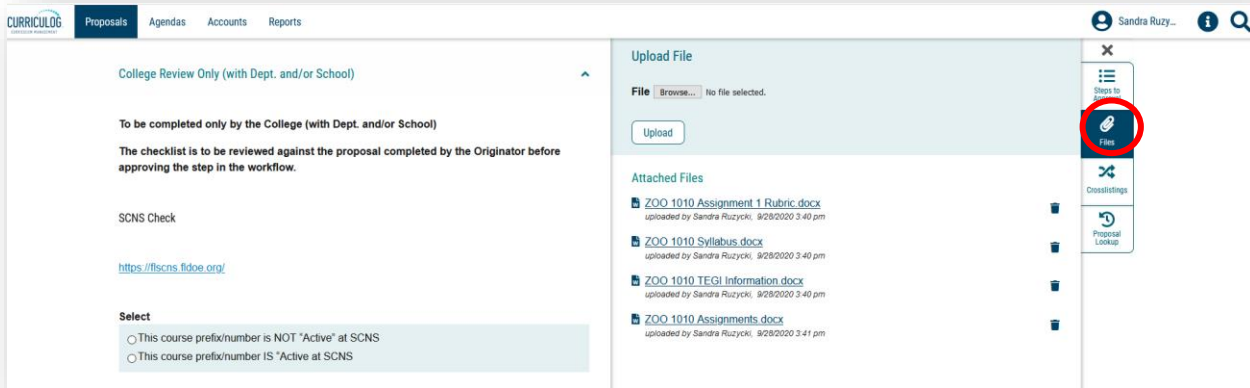
Once the Office responds to a statement or places text in a “Comment” field, the “Save” and “Cancel” buttons appear. In order to keep the selections and comments on the form, the Office-level reviewer must click the “Save” button. This is done for each area within the “Office Review Only” section.



To view files attached to the proposal by the “Originator” or “College,” click the “Paperclip” or “Files” icon on the right side of the dashboard. The files can be viewed by clicking on the file name.

The “Paperclip” or “Files” icon can also be used by the Office to add documents to the proposal.

For questions or assistance, please contact the USF Undergraduate Studies Curriculum team at UGS-DOCurriculum@usf.edu.



Office Approval in the Workflow Process

Once the **Office** has completed the “Office Review Only” section in the Proposal, the right side of the dashboard should be opened by clicking the “Workflow Status” icon. This will open up the approval workflow process. Below you can see the first step is the “Originator.” In Curriculog, the proposer is called the “Originator.” There is a green “Thumbs up” for this step indicating the “Originator” approved the proposal which moved the proposal to the next step, the College. Each of the subsequent steps in the approval workflow process also have a green “Thumbs up” icon which indicates the proposal has been approved.

On the left side of the dashboard, the circles under the title of the course also reflect the approval workflow process and its current status.

The screenshot displays the Curriculog interface for a course proposal titled "LDR - 2010 - Leadership Fundamentals". The top navigation bar includes "CURRICULOG", "Proposals", "Agendas", "Accounts", and "Reports". The user is identified as "Sandra Ruzy...".

The course title "LDR - 2010 - Leadership Fundamentals" is followed by a row of 12 circular icons representing the approval workflow. The first three icons are green with a thumbs-up, indicating approval, while the remaining nine are white with a thumbs-down, indicating pending or disapproval.

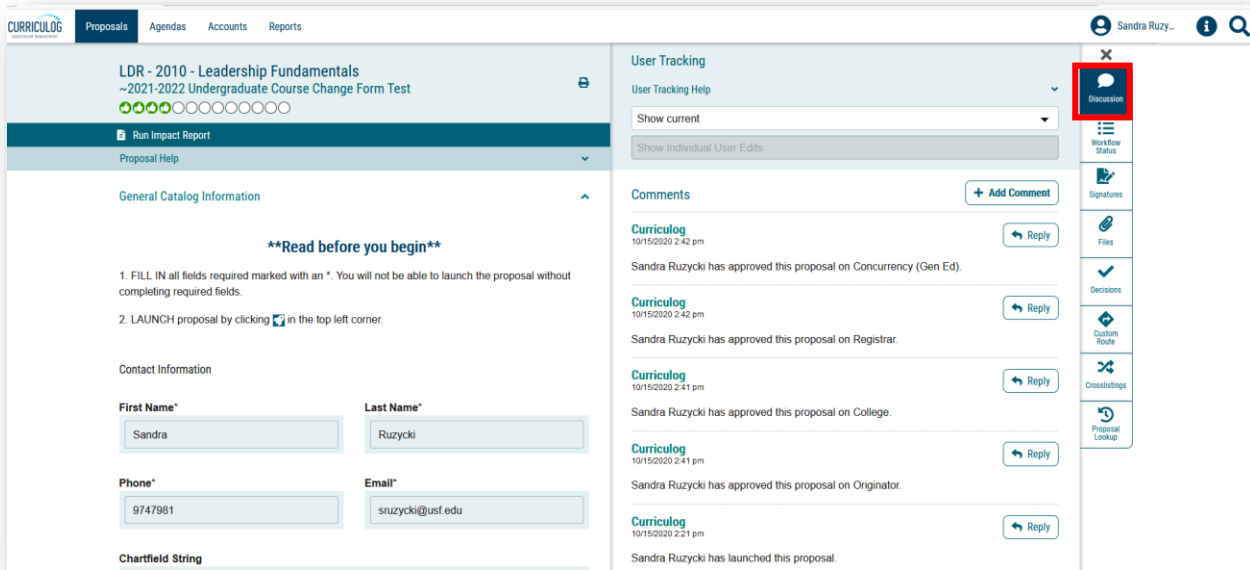
The main content area is titled "General Catalog Information" and includes a section "Read before you begin" with instructions: "1. FILL IN all fields required marked with an *. You will not be able to launch the proposal without completing required fields." and "2. LAUNCH proposal by clicking [icon] in the top left corner." Below this is a "Contact Information" form with fields for "First Name*" (Sandra), "Last Name*" (Ruzycski), "Phone*" (9747981), and "Email*" (sruzycki@usf.edu). There is also a "Chartfield String" field.

On the right side, a "Workflow Status" panel is highlighted with a red box. It shows a list of steps, each with a thumbs-up icon and the word "Approved":

- Originator**: Approved. Participants: Sandra Ruzycski | 10/15/2020 2:41 PM. Includes a "Step Details" button.
- College**: Approved. Participants: Kyna Rhæe Betancourt, Lorene Hall-Jennings, Robert Patterson, Sandra Ruzycski | 10/15/2020 2:41 PM. Includes a "Step Details" button.
- Registrar**: Approved. Participants: Kyna Rhæe Betancourt, Lorene Hall-Jennings, Robert Patterson, Sandra Ruzycski | 10/15/2020 2:42 PM. Includes a "Step Details" button.
- Concurrency (Gen Ed)**: Approved.

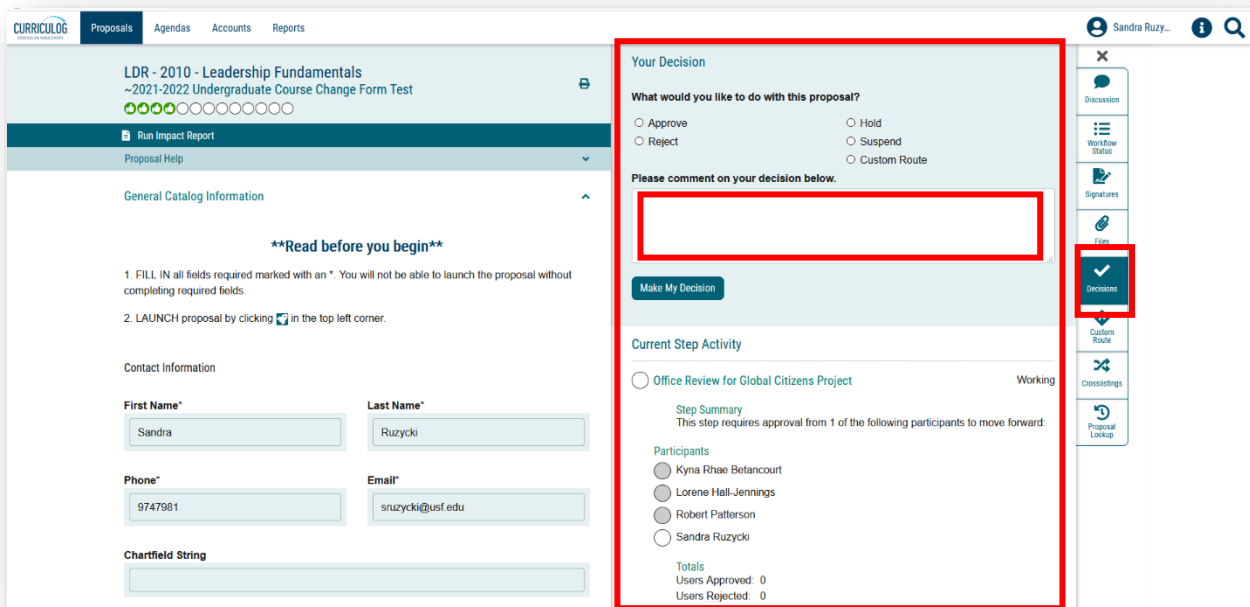
A vertical sidebar on the far right contains several icons, with the "Workflow Status" icon highlighted by a red circle. Other icons include "Signatures", "Files", "Decisions", "Custom Tools", "Crosslistings", and "Personal Lookup".

To view any comments provided in the decision steps prior to your Office Review, click the “Discussion” icon on the right side of the dashboard. This area will display any comments placed in the approval workflow process, including Curriculog system comments. These do not reflect comments placed in the proposal, but rather information placed by each step in the approval workflow process.



To view the place where you (the “Office”) can approve the proposal, click the “Decisions” icon or the “Checkmark” in the listing on the right side of your dashboard.

The right side of the dashboard will change to show the various decisions you can make as the “Office.” In most cases, you will either “Approve” or “Reject” the proposal as the Office. There may be times you want to place the proposal on “Hold” or “Suspend” the proposal. The “Custom Route” option should not be selected, as this is an “Administrative Only” feature.

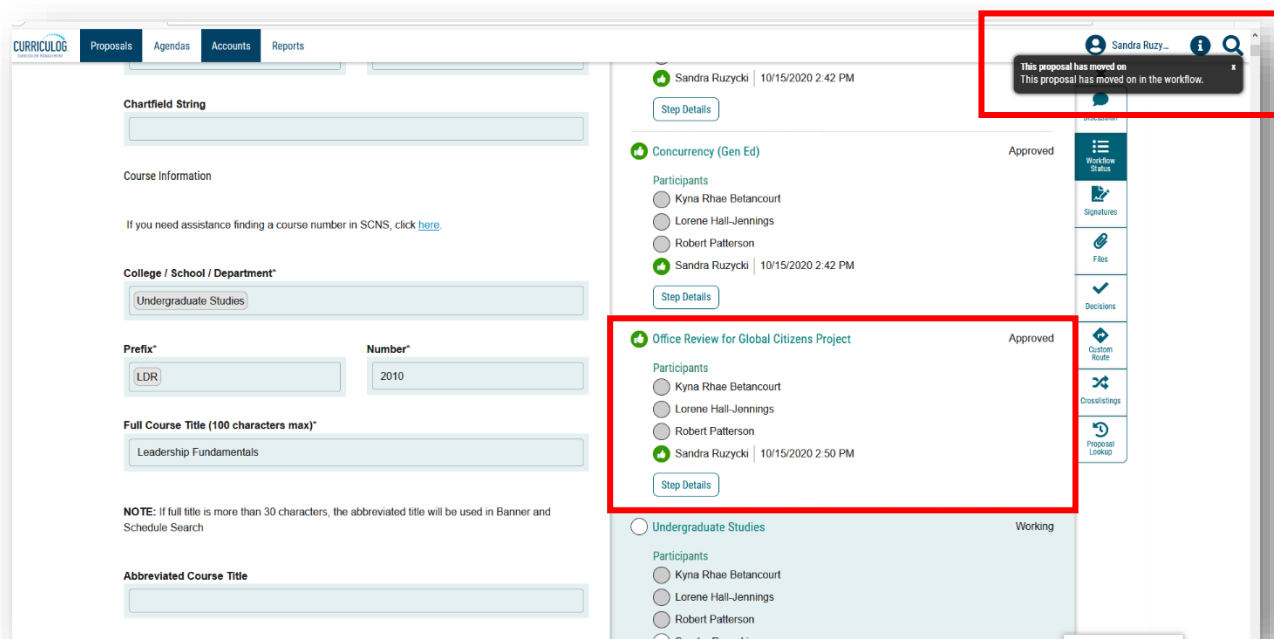


In the comment area, you can also type in any responses which the next steps of the approval workflow process can view. While the Office may have made these comments in the “Office Review Only” section, if information is critical to the approval workflow process, it is best to repeat it in this area.

If your decision is to “Reject” the proposal, be sure to add comments in the text field explaining this decision. In this way, the process owners in the steps prior to the “Office” will understand how the proposal needs to be modified. Proposals that are rejected go back to the previous step, which would be “Concurrency – Gen Ed” or “Concurrency – Non Gen-Ed.”

The Office can request that the proposal be sent back to any previous step in the approval workflow process by contacting the Undergraduate Studies Curriculum team at UGS-DOCurriculum@usf.edu. The Undergraduate Studies Curriculum team can “Custom Route” the proposal back to the “Originator” or “College.” Once you make your decision, the screen will turn gray as the proposal is loaded into the Curriculog system with your decision.

The Workflow Status area now changes to show the green “Thumbs Up” icon next to the “Office” step. The status also changed to “Approved.” A black box in the top right will appear telling you the proposal has moved to the next step of the approval workflow process. Click the X in the black message box to close it.



Undergraduate Studies is the next step in the approval workflow process, and will have the same list of decision options that you had as the “Office.” They can add comments in their approval workflow area. Undergraduate Studies can then “Approve” the proposal.

Undergraduate Studies can also “Reject” the proposal and send it back to the Office. Comments will be on the proposal to help you make the needed changes. You will receive an email notification from Curriculog that the proposal has been sent back to you. You will log into Curriculog, click on the proposal title to display the proposal, and go to the right side of the dashboard to see the comments in the “Discussion” area. You have several choices.

You can make the needed changes, save them on the proposal, and then approve those changes in the approval workflow steps to move it to the Undergraduate Studies.

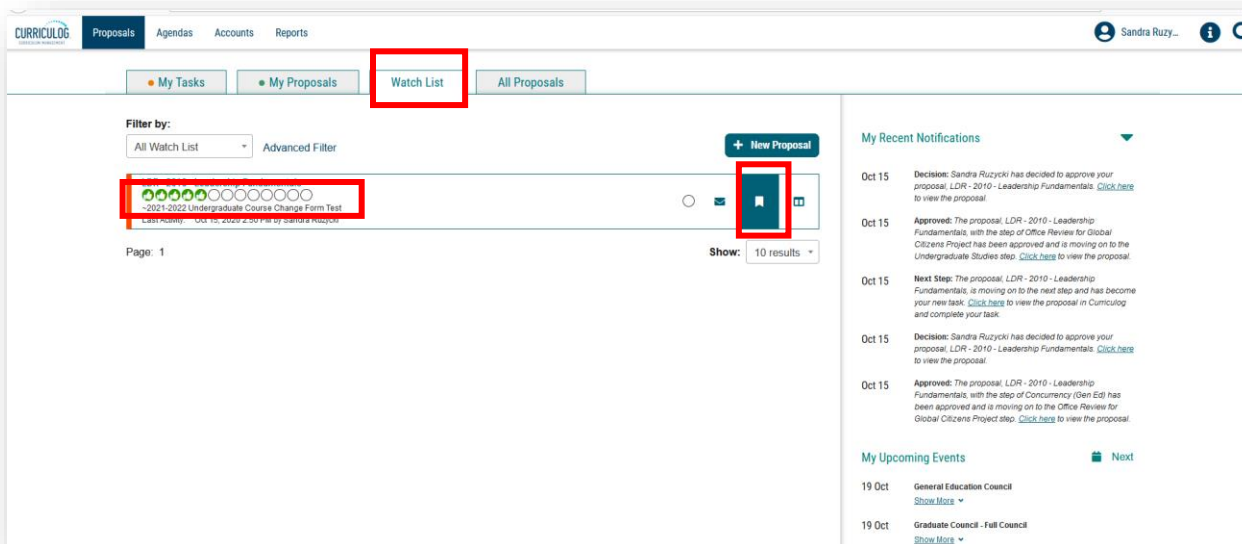
You can “Reject” the requested changes, add comments, and then click “Make My Decision” to move the proposal back to Undergraduate Studies.

Or you can contact the Undergraduate Studies Curriculum team at UGS-DOCurriculum@usf.edu and request that the proposal be sent to the proposer to make the changes.

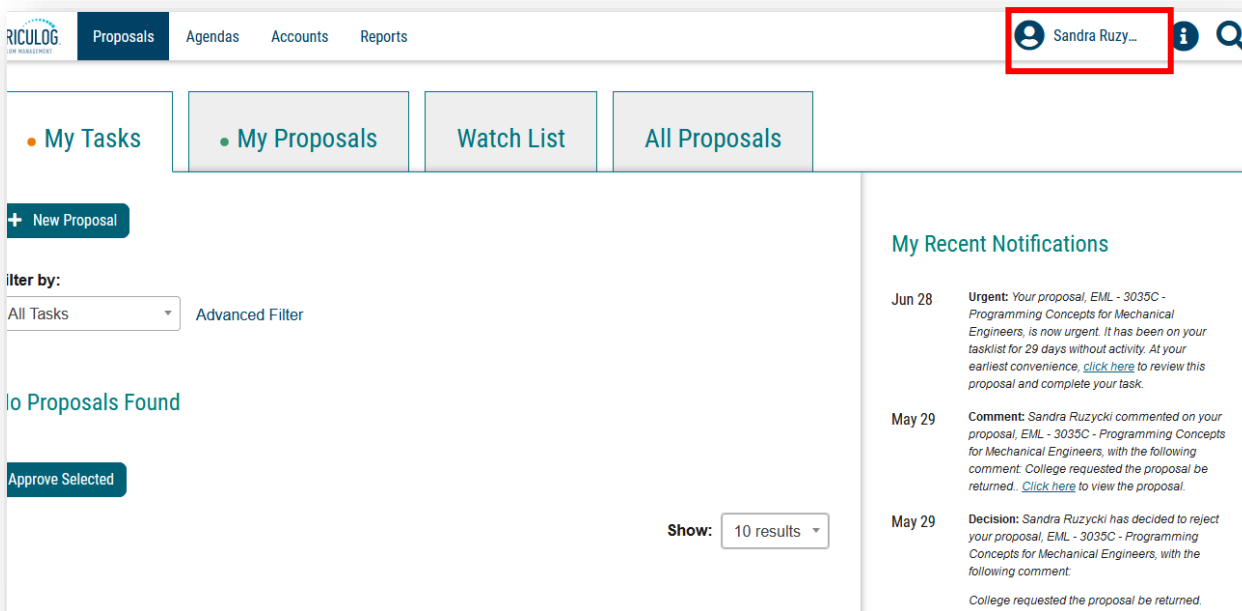
Monitoring the Proposal

You can monitor the proposal's progress through the approval workflow process in several ways. You can place the proposal on your "Watch List" by clicking the second icon to the right of the proposal title. The proposal will appear on your "Watch List." You can click on the title of the proposal to open it and view the "Workflow Status" on the right side of your dashboard.

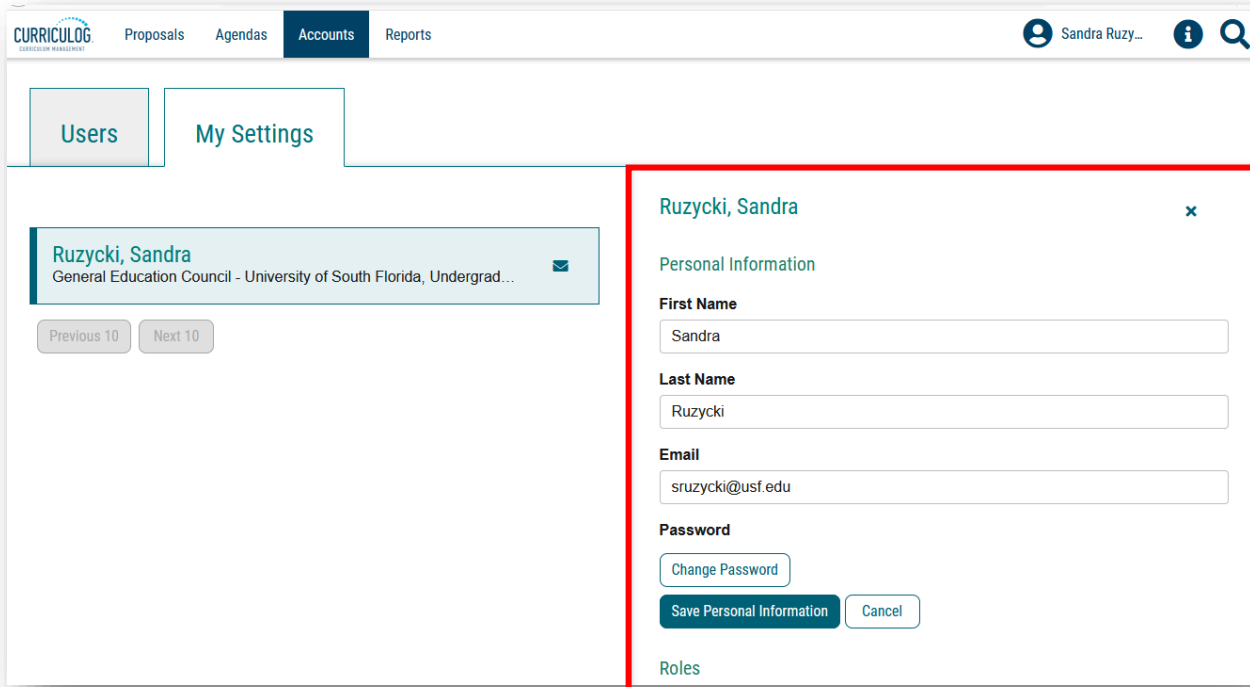
You can also view the status of a proposal by scrolling over the circles under the title to reveal the proposal status. The circles can display a variety of icons based on the decision at that step of the approval workflow process.



You can also receive emails from Curriculog about the status of a proposal. To adjust how often you receive email notifications from Curriculog, click on your user name in the top right of the dashboard.



Select "My Settings" and click your name to bring up the "My Settings" screen.



Scroll down to “Email Options” and use the drop-down arrow to select how often you want to receive email notifications from Curriculog. Then click the drop down under the “Process” heading. You can select “Send messages for the steps in which I am involved only” to have Curriculog notify you when proposals are in the Office step of the approval workflow process.

Or you can select “Send messages for proposals in which I am involved only” and Curriculog will notify you for each step in the approval workflow process. Curriculog will notify you as the proposal moves through the approval workflow process. Click the “Save Preferences” to update these settings in Curriculog.

Originator
Get messages for comments and edits only for user's proposals

Email Options
Weekly Email Digest

Process
Send messages for the steps in which I am involved only

Signature Steps
Use Electronic PINS for signature steps

Signature Pin
You have not been assigned a signature pin.

Save Preferences Cancel

To go back to your dashboard, click the Curriculog logo in the top, upper left toolbar.

CURRICULOG Proposals Agendas Accounts Reports Sandra Ruzy... i Q

Users My Settings

Ruzycki, Sandra General Education Council - University of South Florida, Undergrad... ✉

Previous 10 Next 10

Ruzycki, Sandra ✕

Personal Information

First Name
Sandra

Last Name
Ruzycki

This concludes the USF Curriculog Office Approval Workflow Process tutorial. Additional Curriculog tutorials are located at <https://usf.edu/ugs-curriculum-training>, as well as important dates and deadlines, FAQs, and other resources.

You can email the Undergraduate Studies Curriculum Team at UGS-DOCurriculum@usf.edu for any additional assistance.

