JANUARY 26, 2022

CURRICULUM MANAGEMENT SYSTEM

REVIEWER MANUAL

OFFICE OF THE UNIVERSITY REGISTRAR
YORK UNIVERSITY

Kuali Workflow Overview

What is Kuali Workflow?

Workflow is the approval engine that drives the proposal approval process from the initial proposal submission through to final approval.

Through automating the approval process, workflow enables Faculties to manage everything from simple to complex approval processes with the ability to accommodate unique scenarios that apply to specific proposals, groups, or criteria that require additional or unique governance processes.

Accessing Kuali

Accessing the Kuali Curriculum Management System and Self Registration

Access to the Curriculum Management System (CMS) is through staff Passport York, and role assignment through your Faculty's Course Repository Officer (CRO).

1. If you do not already have one a York Passport account, visit the Passport York & Manage My Services page on the York University computing site:
    http://staff.computing.yorku.ca/faculty-staff/passwords-passport-york-access/
2. Please follow the Kuali Self Registration document to register for a Kuali User Account

Web Address for Curriculum Management System
https://cms.info.yorku.ca/

Roles in the Kuali CMS Workflow

Kuali CMS defines several roles for workflow and system use:

Proponent	**CMS Workflow Role:** initiates a course proposal or course change **Workflow Rights**: Has the ability to: propose new courses, propose changes to existing courses, look up status of their proposals, can share proposals, and can request input on proposals.

Approver	**CMS Workflow Role:** an individual (typically, a member of a committee) who reviews and has the authority to approve the curriculum proposals **Workflow Rights**: can provide feedback on proposal, push proposal back the proposal to the Proponent to make changes, push the proposal forward in next step of the approval workflow, or deny the proposal.
Acknowledger	**CMS Workflow Role:** an individual (typically, a member of a committee) who reviews curriculum proposals and can provide comments **Workflow Rights**: Individuals that cannot approve, send back, or deny curriculum proposals, but are able to provide comments in workflow. Reviewing the proposal is an FYI and with a comment.
Course Repository Officer (CRO)	**CMS Workflow Role:** a CRO is in place for every Faculty and Anchor Faculty. CROs are local curriculum administrators who have the responsibility to review curriculum proposals, provide curriculum governance support for their Faculty and in Kuali CMS workflow have specific administrative responsibilities. **Workflow Rights**: can view any proposal for their Faculty anywhere in workflow, can withdrawal proposals in workflow, can enter curriculum details at the final approval state of the Faculty workflow, required to add administrative information to proposals.

All Kuali users can search the Course Repository (Kuali CMS), and can develop and generate reports.

Proposal Notifications

Curriculum reviewers (Approvers or Acknowledgers... a reviewer) are notified of an action item by Kuali CMS in two ways. If there is a course proposal in workflow queue, Kuali CMS will issue an email notification to the Approver and/or Acknowledger at which workflow step (committee) that course proposal is in queue at. The Approver and/or Acknowledger can also access the action item list for any course proposal that is awaiting their review or action via the Kuali dashboard (system notification).

1. Email Notifications

The CMS will send an email to the yorku.ca account that belongs to the next individual/group in the workflow as curriculum moves through. This is automatic; it does not require any intervention. If a Reviewer's email address is associated with the next step in the curriculum approval process, that email will receive a notification. For steps on reviewing curriculum changes through a notification email.

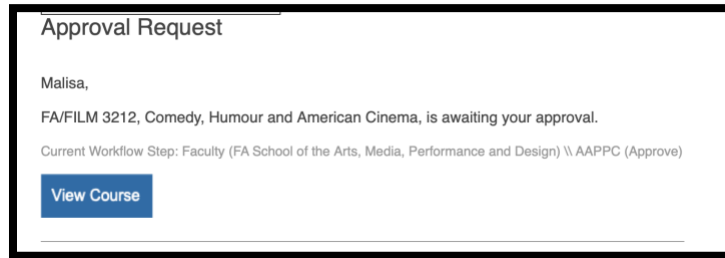In the email you receive, click on 'View Course' to access the course:

Figure 1 - Email Notification

2. System Notifications

When logged into Kuali, curriculum requests to be reviewed can be accessed through the Dashboard and Action List.

Accessing/Actioning Curriculum Changes from your Dashboard

1. In the Dashboard 'My Action List' section of the Dashboard on the right side, click the title of the proposal to approve or click View All to view your entire action list.
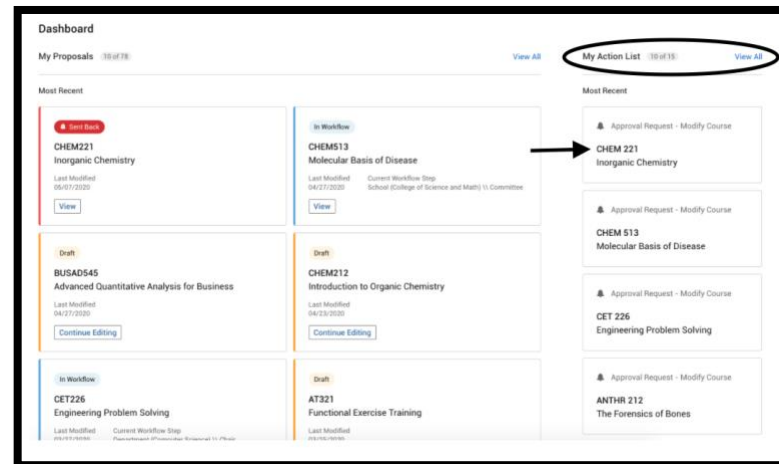

Figure 2 - User Dashboard

Accessing/Actioning Curriculum Changes from your Action List

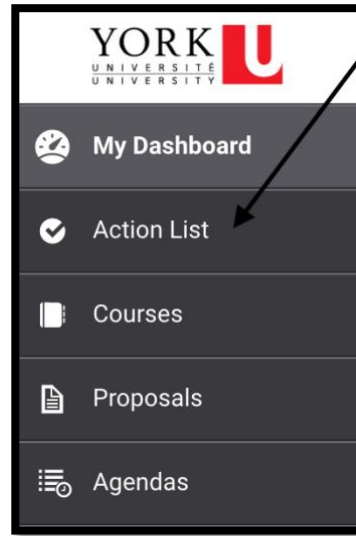1. On the left-hand side of the webpage, click on **Action List.**

Figure 3 - User Dashboard

2. The Action List will display all curriculum proposals that require action from you. Click on the proposal you would like to review.

    Code: Course code (faculty, subject code, and number)
    Title: Course Title
    Description: Brief Course Description
    Type: Type of course proposal (New course, Modify course)
    Created On: When proposal was created in Kuali CMS
    Action Requested: The action that is being requested of you (Approval, Acknowledge)

Figure 4 - Action List

The Acknowledger Role in Workflow

What is a proposal acknowledgement?

Acknowledgements are required from workflow members in the curriculum governance process when a new or modified course proposal requires acknowledgement (a review) before being approved to be offered. Acknowledgements (reviews) do not prevent the proposal from moving forward in the approval process.

Can I leave a comment when acknowledging a proposal?

Yes. Comments can be included when acknowledging a proposal but are not required. Comments are not editable and are displayed to all users viewing the proposal, including your name and a date and time stamp when the comment was made. Please note that the comments section is a general text field, your comments will not be applied to a specific section in the course proposal. Thus, if you wish to comment on a specific section of the proposal, make sure to reference the section in your comment.

How to Acknowledge a Proposal

1. In the workflow proposal view, click on **Acknowledge** on the right-hand side of the page.
2. To leave a comment, enter text into the Comment Field (optional).

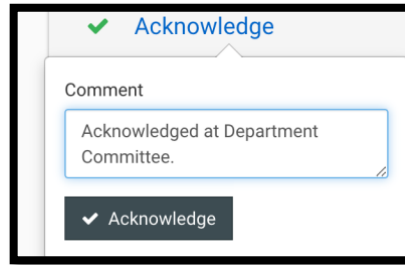3. Click the **Acknowledge** Button.

Figure 5 - Acknowledge Function

The Approver Role in Workflow

An Approver has the same rights as an Acknowledger, both roles are reviewers, as they can both leave comments on the proposal. However, an Approver has additional rights from an Acknowledger, they can Approve a Proposal, Send Back a Proposal to the Proponent or to a previous step and as well Deny a Proposal.

Approving a Proposal

What is a proposal approval?

Approvals are required from stakeholders in the curriculum governance process when the new or modified course proposal requires formal approval before being approved to be offered at the institution.

How to Approve a Proposal

1. In the workflow proposal view, click on **Approve** button on the right-hand side of the page.
2. To leave a comment, enter text into the Comment Field (optional).
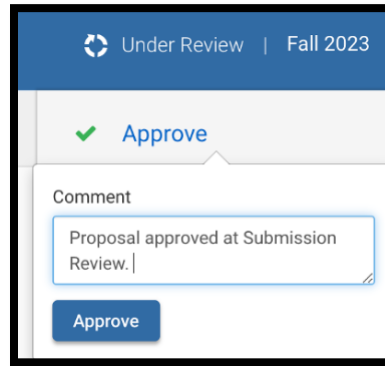3. Click the **Approve** Button.

Figure 6 - Approve Function

Send Back a Proposal

What is send back?

Oftentimes in the proposal review process, a proposal needs to be sent back to the original proposer or to another approver in the workflow for changes. Send back enables an Approver to send the proposal back to a specific node in the workflow or to the Proponent for changes so the proposal can continue in the approval process.

Who can I send a proposal back to?

Proposals can be sent back to the original Proposer or to a previous step in the workflow.

Can I leave a comment when sending back a proposal?

Yes. Comments are required when sending back a proposal.

How to Send Back a Proposal
1. In the workflow proposal view, click the **Send Back** button on the right-hand side of the page.
2. Select which workflow node the Proposal should be send back to.
3. Enter text into the Comment Field (required).
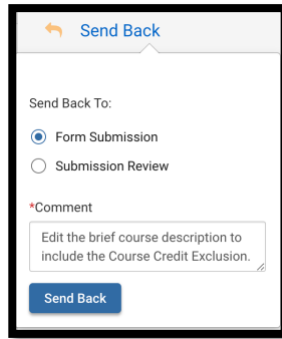4. Click the **Send Back** button.

Figure 7 - Send Back Function

Deny a Proposal

What is a denial?

Sometimes a proposal cannot be approved or sent back for changes and needs to be denied from moving further in the workflow. Denying a proposal enables an Approver to stop a proposal from moving through the workflow entirely or enable a review process to begin to validate whether the denial should be permanent or if changes are appropriate or possible.

Who can deny a proposal?

Any user assigned approval rights in a workflow node (committee) can deny a proposal.

In workflow, if a single or multiple (committee) votes are required for approval, any approver that denies the proposal will result in the proposal being denied.

What happens when a proposal is denied?

A proposal denial notification from Kuali CMS is sent to the Proposer and the proposal is permanently denied and unable to be edited and resubmitted for approval.

Can I leave a comment when denying a proposal?

Yes. A comment is required when denying a proposal.

How to Deny and leave a comment for a Proposal
1. In the workflow proposal view, click the **Deny** button on the right-hand side of the page.
2. Enter text into the **Comment** Field (required).
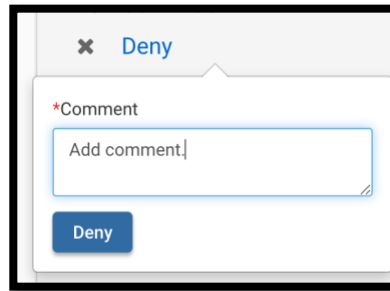3. Click the **Deny** button.

Figure 8 - Deny Function

How to view Approver and Acknowledge Comments in Workflow

Kuali creates and retains an audit log of all comments submitted throughout a course proposal lifecycle at all workflow steps.

1. Click on **Expand** to view the approver and acknowledged comments entered throughout the workflow process.
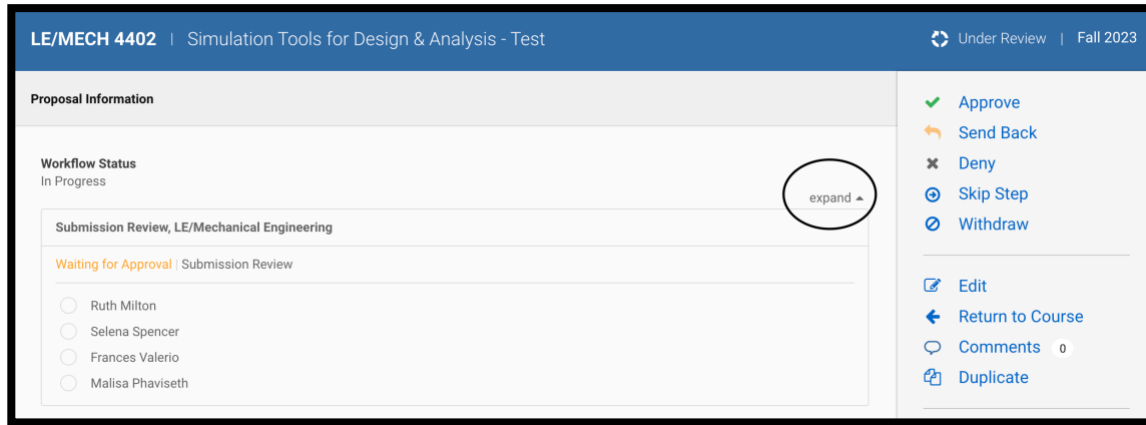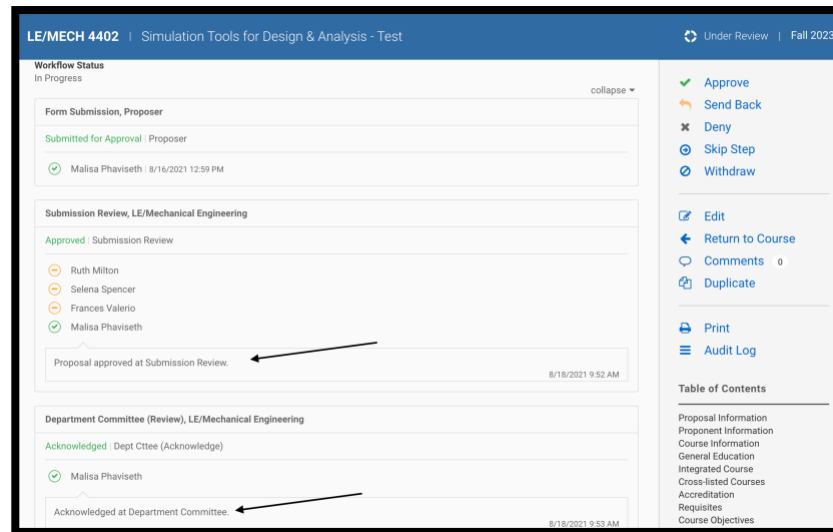
Figure 9 - Course Proposal View

Figure 10 - Expanded Workflow

Comments Function

Allows workflow members to have a conversation and tag other Kuali users. Comments between Kuali users on course proposals are considered conversations.

The User will be notified by email notification when they are tagged in a Comment.
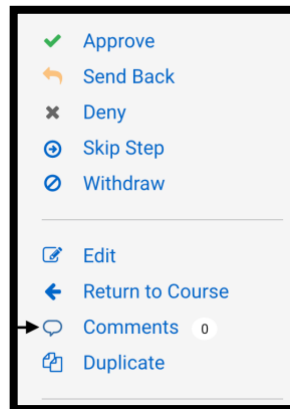

Figure 11 - Email Notification

Figure 12 - Comments Function

1. Select a Kuali user from **Select Recipient(s)** field with whom you want to share a comment. Multiple recipients can be selected.
2. Type in the comment in the text box.

3. Select Grant edit access while in this step to allow users to edit the proposal (optional).
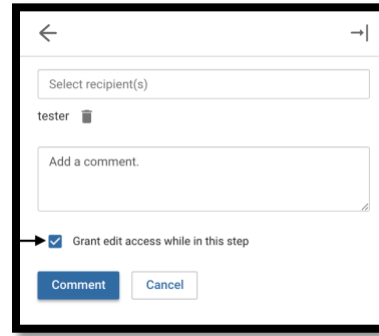4. Click **Comment**.

Figure 13 - Sending a Comment to a Kuali User

It is possible to add additional Kuali users to an existing Conversation, here are the steps to add someone to a comment conversation on a course proposal:

1. From within a proposal, click **Comments** in the right panel.
2. Select the conversation you would like to add a user to.
3. Type your comment,
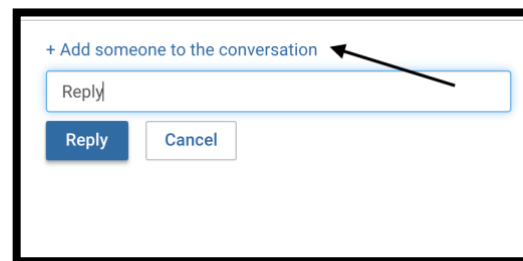4. Select **Add someone to the conversation**.

Figure 14 - Replying to a comment and adding another user to the conversation

5. Select a Kuali user from Select Recipient(s) field with whom you want to share a comment. Multiple recipients can be selected.
6. To remove a user, click the trash icon in line with their name.

7. Click **Reply** to send your comment.
8. Click **Cancel** to return to the previous screen.

Definitions

Status

Status	Definition
Draft	The proposal has been worked on but has not been submitted to the approval workflow.
Approved	The proposal has been approved by a node in the approval workflow.
Under Review	The proposal is being reviewed by a node in the approval workflow.
Denied	The proposal is in permanently denied status. No further edits/changes can be made.