

Curriculum Review Workflow Submitter and Department Chair Training Video Transcript

Introduction

Thank you for joining us for OnBase Curriculum Review Training. I'm Gloria Rocklin, Recording Secretary for the Graduate Studies Committee. And I'm Julie Hunter, Recording Secretary for the Educational Policies Committee. This training will consist of two parts: a general overview of the Curriculum Review Workflow and a hands-on demonstration. Let's get started.

Part I: Overview by Julie Hunter

For this portion of the training, I'll be giving an overview of the Curriculum Review Workflow website. Here you'll find access to the Curriculum Proposal form as well as other important information including user guides and templates. I'm not going to open the form now but this is where you would click to go ahead and initiate a new proposal. Gloria will show you this shortly.

Supported Web Browser

It's very important when you're using the OnBase Curriculum Review Workflow that you use a supported web browser. We recommend either Firefox or Chrome. Please do not use Safari as there have been issues using this browser and it has limited versions that are supported. Chrome seems to work the best. Also please try not to log into Portal, CSUN box, or any other CSUN web services while you are submitting a proposal form as this can cause the form to not load properly. If you have an issue like this, what you can do is open the form in Chrome Incognito, or if you're using Firefox, using Private Browser. And this should ignore your web browser's cookies and allow you to use the form as intended.

Time Out

Also important to note is the form will time out after a certain amount of inactivity. This is a security setting for all of OnBase. We recommend saving an initial draft with the minimum required fields and then going back and saving as you go to finish your proposal so you don't encounter any issues like that.

Resources

For time purposes, I'm not going to go through all of the Resources below but after this training you are welcome to go and review each of these elements. The Curriculum Review Workflow is described in detail in this drop down. We have a lovely diagram and it will explain the steps in the process and the form going to and from the different approval levels and groups. Feel free to read this on your own time.

We also have User Guides and Reference Sheets for the various roles in the workflow. So if you're a Submitter our Submitter Guide here will give you the basic information on submitting and saving a form and if you need more information or details on what actually needs to go into the proposal, we have a supplement that goes step-by-step into all of the fields and information that you might need to include. Other user roles might be a Department Chair, a College Curriculum Committee member or chair, or members of EPC, GSC and Associate Deans, so select your relevant user guide.

We'll have some FAQs here for submitters, University Curriculum Deadlines, your college deadlines might differ, Resources, so we have both CSUN Resources and CSU Resources that are related to curriculum proposals, please read these as necessary. And we have some handy catalog copy templates, so if you are doing a new program proposal or a program modification you can use one of these templates. The rest of this you can look at on your own.

Proposal Form Tips

We do want to emphasize these proposal form tips over here on the left:

- Which, of course as I already said, using a supported web browser and not logging into other CSUN web services simultaneously.
- When you do open the form, make sure that the CSUN logo appears at the top left. If that's not showing there that's an indication that it didn't load properly.
- So when you fill out the form we recommend you start with filling out the minimum required fields and saving it as a draft. You'll be able to access it at a later time to finish completing the form which Gloria will demonstrate for you.
- You can use the print button at the bottom to save a PDF of the form before submitting or saving so you have a copy of what you've done.
- You can use copy and paste for fields with long text, such as the justification section, impact, etc. But we do recommend that you use the copy/paste instructions you can get to from this link and paste in plain text.
- When you submit your form, which Gloria will show you, you will get a confirmation message. So please make sure that you receive this message before you close your browser window.
- And as you're updating your proposal, please be sure to save your work regularly so that you don't get timed out.
- And finally, when you're done submitting your proposal, viewing or editing, always close your browser window when you're finished.

Now, I'm going to hand it over to Gloria who will go through all the steps for submitting a new curriculum proposal.

Part II: Demonstration by Gloria Rocklin

For this portion of the training, I will demonstrate how to initiate a curriculum proposal form. From the Curriculum Review Workflow website, select the Curriculum Proposal Form button.

Enter all required fields. *Note: The required fields are indicated by a red asterisk and must be completed to submit the form.*

- Select the College from the drop-down list.
- Select the Department or Program.
- The drop-down name filters based on the college selected.
- Enter your full name as the submitter.
- Enter your CSUN email address.

Proposal Types

There are 6 proposal types: New Course, Course Modification, Delete Course, New Program, Program Modification and Delete Program. I am going to select New Course. The form will only display the relevant fields for the proposal type selected.

Additional Required Fields for New Courses

Complete the following additional required fields to save the form.

- Does this new course proposal replace a current experimental course?
- Enter the Subject Abbreviation and Course Number.
- Select the Course Level.

Note: Any text copied from another file or source must be pasted as plain text in the proposal form.

Attachments

Files can be added to the attachment section. Select the Attach button to browse for the file. Select the file. Click open. Please upload attachments in PDF file format. Multiple supporting documents should be consolidated into one file and add attachments at the end of creating the proposal to avoid uploading multiple versions prior to submission.

Record of Consultation

Record of Consultation: Select the Add button. Enter the date, department or college, the department chair or program coordinator's name and select the concurrence.

Printing or Saving a PDF Copy

Select the Print button to Print or Save the proposal as a PDF.

Saving the Proposal

Select the submission status and SAVE AS DRAFT to complete the proposal at a later time. Then select the Submit button. The Submission Confirmation message displays the first time the form is submitted. Close the window or tab.

Retrieving and Submitting a Saved Proposal

Retrieve email notification. This may take up to 5 minutes. *Note: The email address is "no-reply-onbase@csun.edu".* Open the proposal from the email link. Login with your CSUN USER ID and password. Double-click on the proposal. The submitter can access the proposal at any time to view the updated proposal status. The Approvals and Comments section appears but is grayed out. Once you have completed the proposal, select Complete to submit the proposal to the department chair.

Department Chair

The department chair will receive an email notification with a link to access the submitted proposal form. The form will be read-only other than the chair's approvals and comments section. The chair can approve, deny or return for changes.

Note: Be careful when selecting Deny, you do not want to select this decision instead of Return for Changes. A denied proposal will no longer be in the workflow.

Conclusion

And that concludes this training. Thank you for joining us today. We hope you found this training useful. Please be sure to refer back to the Curriculum Proposals website for additional resources.