


# curriQūnet | meta

## 1 Introduction


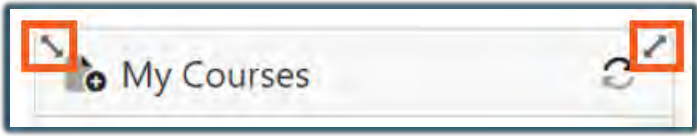



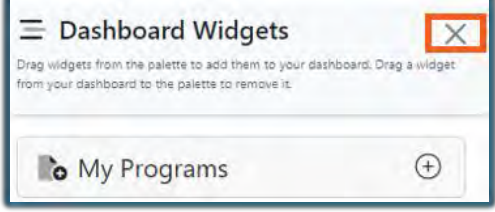

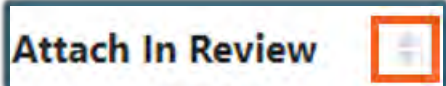






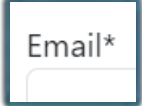

Welcome to the curriQūnet META User Guide! We are excited to have you here! At curriQūnet META, we are focused on giving you the upmost customer service and curriculum management solutions experience. On your journey, you may hit some windy roads, but this Administrative User Guide is designed to make those roads easier to navigate.

This User Guide contains information related to administrative and general functions within the curriQūnet META platform. Administrative exclusive portions of the User Guide will be identified with the following icon. 

## 2 curriQūnet META's Uniform Options

Though some components and Figures displayed throughout this User Guide may vary from what you see on your institution's proprietary website, there are certainly commonalities.

Here is a list of buttons and options that are used throughout the curriQūnet META website, having consistent behavior throughout the site.

Symbol	Explanation	Example
	Click and drag any part of the outer window to resize.	
	Click to expand or minimize. This option will also be available in some instances to show additional details.	
	Click to close a window. Any unsaved changes will be deleted.	
	Click to sort.	
	Click, drag, and drop to relocate an item.	
	Click to permanently Delete something.	
	Click to refresh the window.	
*	All asterisked Fields are required.	
	Click to Edit	

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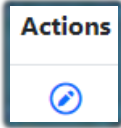




		
	Indicates a required Field. This also operates as an attention indicator	
	An Action in a particular section is not allowed.	

Figure 2-1



### 3 Getting Started

curriQūnet META is optimized for the most up-to-date versions of Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari. You can access curriQūnet META from a Windows or Apple computer or laptop, as well as Android and Apple devices like tablets, iPads, and mobile devices. curriQūnet META’s design is responsive and adaptive for each of these devices and will adjust to any screen size.

Your institution has its own proprietary curriQūnet META link which will display its own proprietary [splash page](#).

Use this example to navigate to your curriQūnet META website:

**Sandbox** (Test environment): [Name of college].sandbox.curriQūnet.com

- For example, if your university was Keene State College, the sandbox link would be as follows:  
keenestatecollege.sandbox.curriQūnet.com

#### Use case:

*An instance of when you would want to do something in the sandbox environment is when you would like to test if a revision or functionality is working as you would like it to prior to pushing it live.*

**Live:** [Name of college].curriQūnet .com

- For example, if your university was Keene State College, the live link would be as follows: keenestatecollege.curriQūnet.com

#### 3.1 Splash Page

After you have navigated to your institution’s proprietary link, you will arrive to your proprietary splash page, which is the Public Dashboard view.

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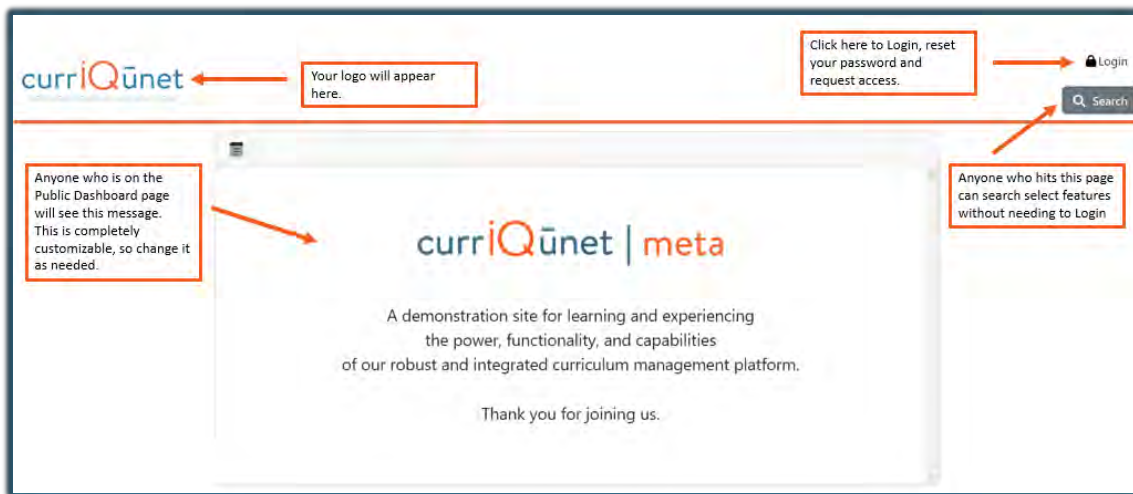


Figure 3.1-1

## Use case:

Content commonly used on the public splash page are public Reports and announcements.

## 3.2 Logging In

Once you have navigated to your proprietary curriQūnet META link, follow these instructions to Log in:

1. ↗ Click the Login button located at the top right of your screen.
2. ↗ Click the Sign in to curriQūnet META text and a window will pop-up.
3. 📧 Enter your Email and Password.

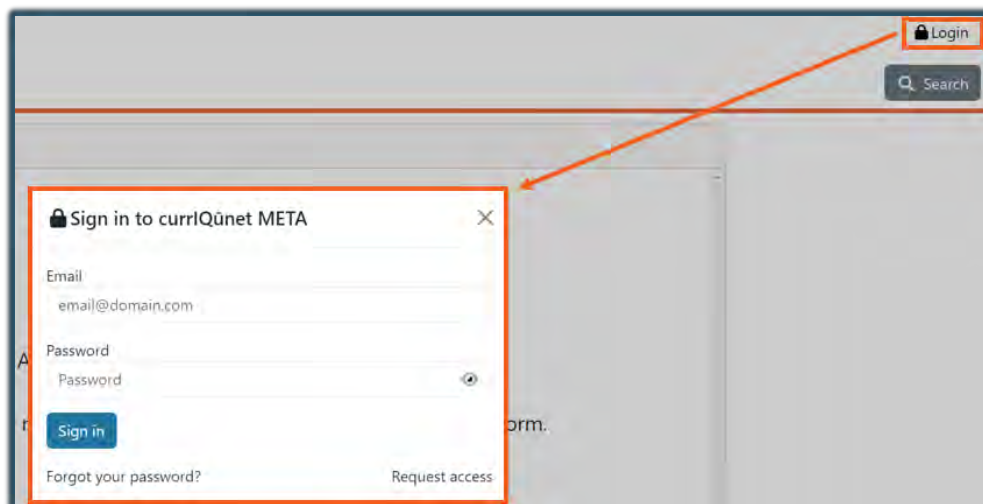


Figure 3.2-1

- To see the characters you have typed into the Password field, click the eye icon located on the right side of the Password box.
- If you have entered your password incorrectly, you will see the following message pop-up.

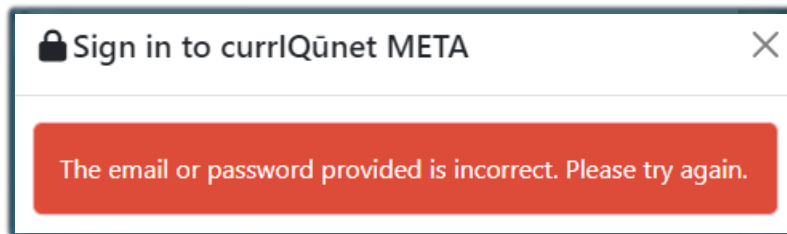


Figure 3.2-2

4. ↗ Click the Sign in button.

### 3.3 Reset Password

If you forgot your password or just want to reset it, follow these instructions:

1. ↗ In the Login window, click the Forgot Your Password text located below the Sign In button.
2. 📧 Another box will pop-up. Enter your email address.
3. ↗ Click the blue Reset Password button. If your email address exists in the curriQūnet META system, you will automatically receive an email prompting you to reset your password.

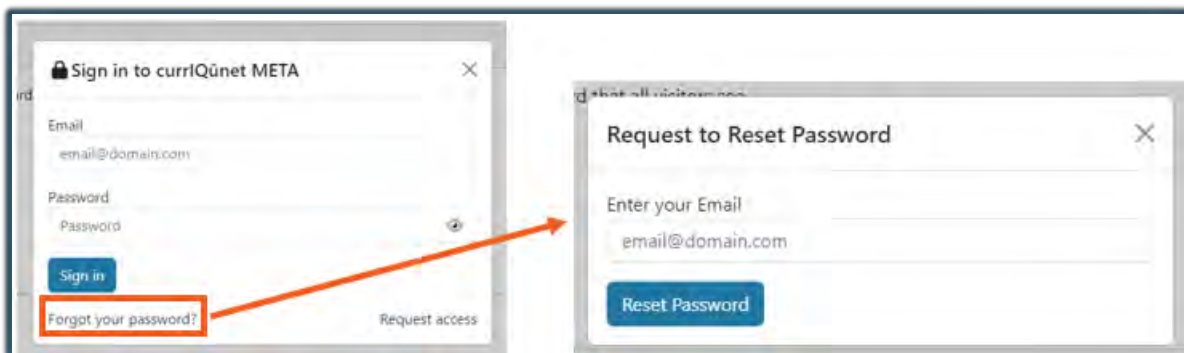


Figure 3.3-1

4. Follow the steps in the email to reset your password.

#### 📘 **Information:**

You can also reset your password while logged in via the Account Info portion of Your Profile.

## 3.4 Request Access

To have full control over your institution's curriQūnet META website, you must have Administrative access, otherwise you can request User access.

To 'Request Access', follow these steps:

1. ↗ Click on the Login button located at the top right of your proprietary splash page.
2. ↗ Click Request Access located at the bottom right of the pop-up.
3. 📄 Fill out the entire Request Access form.

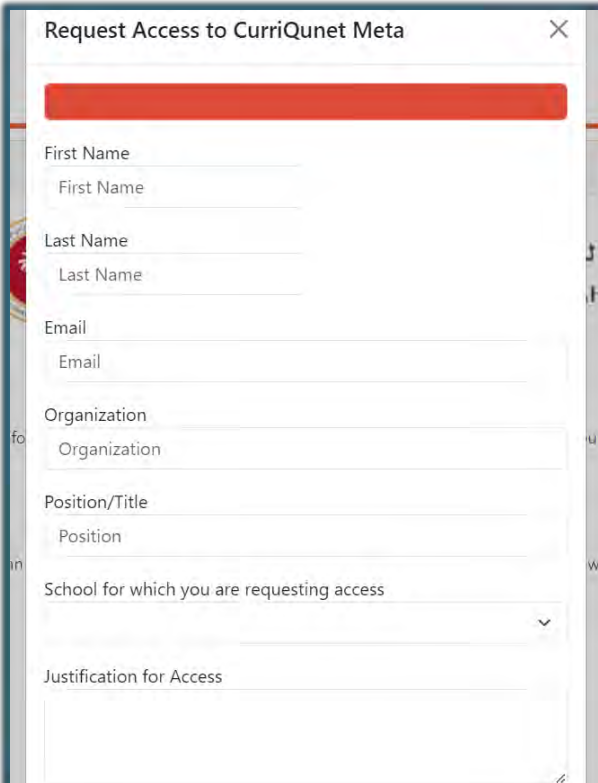
A screenshot of a web form titled "Request Access to CurriQūnet Meta". The form is enclosed in a light blue border with a close button (X) in the top right corner. At the top, there is a red horizontal bar. Below it, the form contains several input fields: "First Name" (with a sub-label "First Name"), "Last Name" (with a sub-label "Last Name"), "Email", "Organization" (with a sub-label "Organization"), "Position/Title" (with a sub-label "Position"), and a dropdown menu for "School for which you are requesting access". At the bottom, there is a text area for "Justification for Access".

Figure 3.4-1

4. ↗ Click the Submit Request button.

At this point, your information is emailed to a system Administrator at your institution for review to determine your access privileges. If approved, you will be given appropriate access.

### Use case:

*If a new faculty member joins but has not yet been added into the curriQūnet system, that faculty member will need to Request Access.*

## 3.5 Sign Out

Follow these instructions to Sign Out of your account:

1. ↗ Click your Name located at the top right corner of any page.
2. A new window will appear.
  - ↗ Click the Sign Out button located at the bottom left of the window.

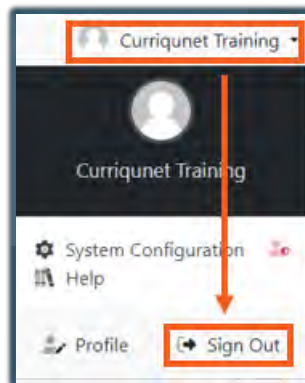


Figure 3.5-1

You are now signed out and will be routed to the main splash page.

## 3.6 Support and Help Desk

curriQūnet offers a professional support team dedicated to providing quality customer care. Per our standard SLA, we will respond to submitted issues in order as they are received, except in the case of a system emergency.

- Emergencies are responded to with the highest priority.
- Customer Service Technical/Development staff are available by phone and email; Regular support hours are Monday - Friday 6:00a.m. to 6:00p.m. Mountain Standard Time.
- System maintenance and support are scheduled during non-critical usage times, typically Thursday evenings. Update and maintenance notices are sent to your institution's System Administrators notifying of date and potential down times for system maintenance and updates.

### 3.6.1 Ticketing Process


In addition to the escalation strategy noted above curriQūnet will also provide you with a means to expedite the submission and resolution of support tickets based on the client criteria described in Section Users with appropriate permissions to the curriQūnet support desk are able to submit support requests and monitor their progress in real time.

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All submitted tickets can be followed via the ZenDesk system located at:  
<https://governet.zendesk.com/hc/en-us>

## 4 META Site

If your account has Administrative Permissions, you will have full control of your institution's site.

If your account does not have Admin access, look for this icon  throughout the User Guide to recognize which sections will not apply to your account.

See below for a snapshot of your proprietary META site upon logging in.

There are four parts of the page defined as follows:

1. [Global Navigation](#) – This part of the page is always static. You will always see the same navigation options no matter where you are on the site.
2. Context Navigation – This navigation will always appear on the screen. Navigation options will vary depending on which part of the site you are on.
3. Body – This is where all the content on your institution's website will be displayed.
4. Properties – Dependent on where you are on the site, Properties may or may not appear. Within Properties, you can customize items within your site.

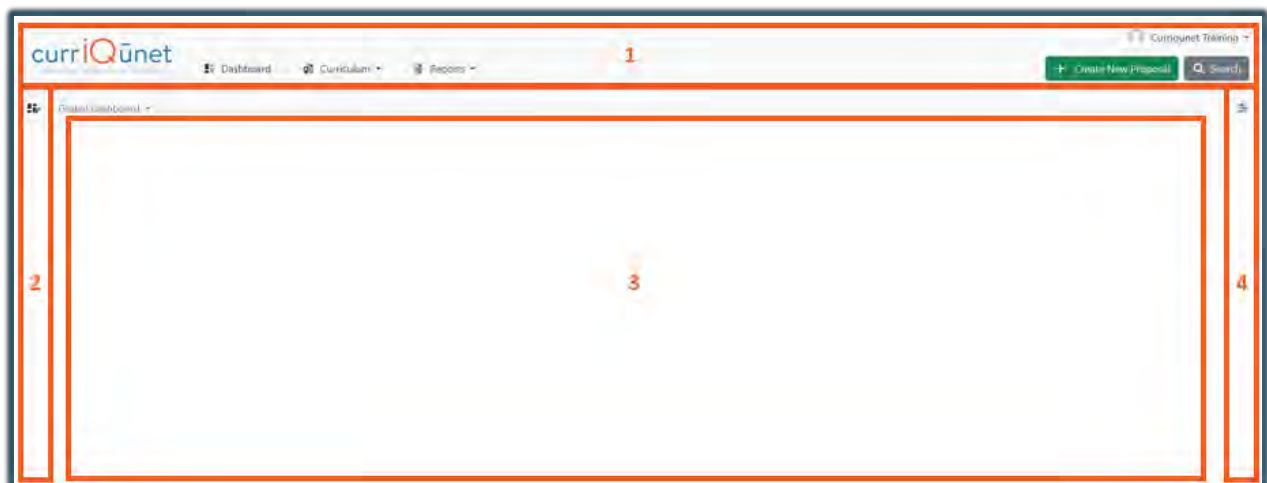


Figure 4-1

Below is a snapshot of the main Administrative page's features.

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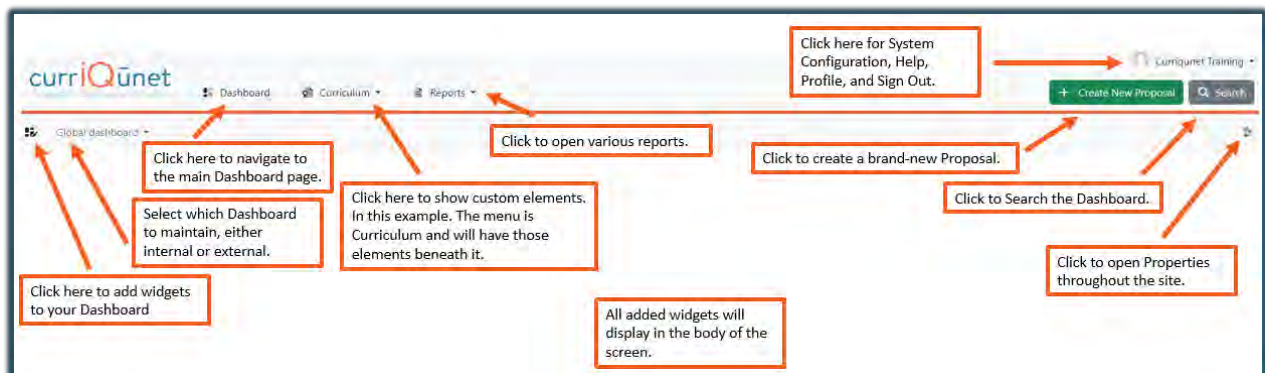


Figure 4-2

## 4.1 Global Navigation

The Global Navigation portion of the screen will encompass the following options.

- **Logo** – In the example Figures used throughout this User Guide you will see the curriQūnet logo. However, on your institution’s site, your logo will replace the curriQūnet one.
- **Dashboard**
- **Curriculum** – You can customize which options display in the Curriculum menu as well as customize the naming convention of options. This menu is completely proprietary to your institution based on what services you have licensed with curriQūnet META during your onboarding process. For example, if you have added the Program Review module, you will see it displayed under the Curriculum tab. By default, all clients will license Curriculum Management, Courses, and Programs. In order to populate what appears on your institution’s proprietary platform, contact curriQūnet META’s [support team](#) and we will configure this for you. Likewise, individual User access Permissions can be configured.
- **Reports**
- **Name** – Clicking this will bring up your Profile, Help and System Configuration. Note that the Username is your email address.
- **Create New Proposal**
- **Search**

### **i** Information:

User assigned Permissions dictate what each User is able to see in the Global Navigation as well as throughout the entire curriQūnet website. Remember, curriQūnet customizes the platform for your institution.



Figure 4.1-1

## 4.2 Dashboards

In this section of the User Guide you will learn about Dashboards. The Dashboard menu is located in the [Global Navigation](#) menu. Clicking on Dashboard from here will always navigate you to the main Dashboard page.

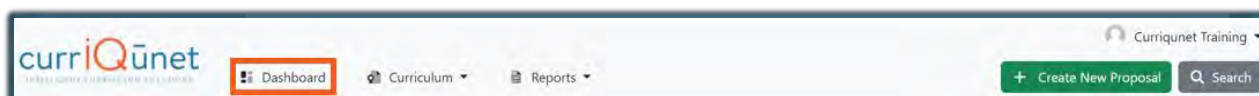


Figure 4.2-1

There are two different kinds of Dashboards available once you are on the main Dashboard page:

- [Public](#) – Anyone who has access to your institution’s proprietary web link has access to the Public Dashboard.
- [Global](#) – Anyone who is logged in to your proprietary institution’s account can view the Global Dashboard.

### 📘 Information:

*Toggle between Dashboards by clicking on the drop-down menu located to the right of Properties. By default, Global Dashboard is selected.*

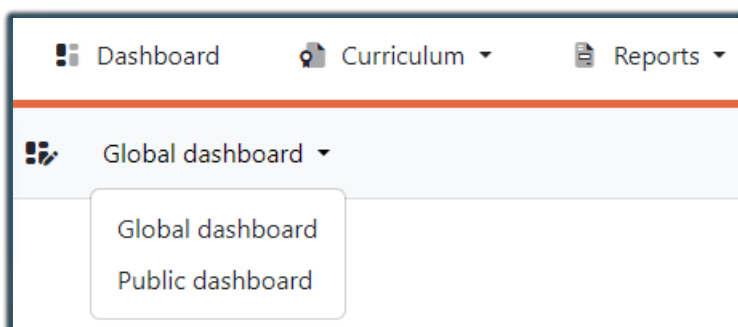


Figure 4.2-2

### 4.2.1 Public Dashboard

Anyone who has access to your proprietary web link has access to the Public Dashboard. Having an account or being logged in is not necessary to view this Dashboard. The Public Dashboard is essentially the page you are on prior to Logging In.

You are limited to the following activities via the Public Dashboard:

- View Message to Everyone.
- [Limited Search options](#).

If you need to do anything more than the previous bullets, you will need to [Request Access](#) to an account.

As an Administrator or User, if you are toggled onto the Public Dashboard, any changes made to the page's body will reflect on the splash page in real-time.



Figure 4.2.1-1

## 4.2.2 Global Dashboard

Anyone who is logged into to your institution's account can view the Global Dashboard. To access the Global Dashboard at any time while logged into the site, click the Dashboard button located at the top left of the screen just next to your institution's logo.

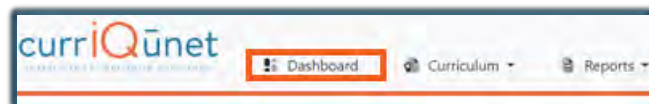
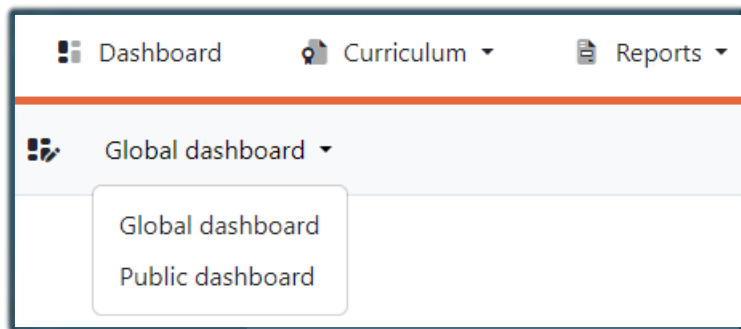


Figure 4.2.2-1

### **Information:**

*Toggle between Dashboards by clicking on the drop-down menu located to the right of Properties. By default, Global Dashboard is selected.*

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*Figure 4.2.2-2*

## 5 Widgets

In this section of the User Guide, you will learn what the purpose of each Widget is, how to Add Widgets, how to Remove Widgets, and how to Edit Widgets

Widgets are available from the Context Navigation portion of the screen. Click the Context Navigation to open the list of available Widgets.



Figure 5-1

Click the X icon located to the right of Dashboard Widgets to close the Widgets menu.

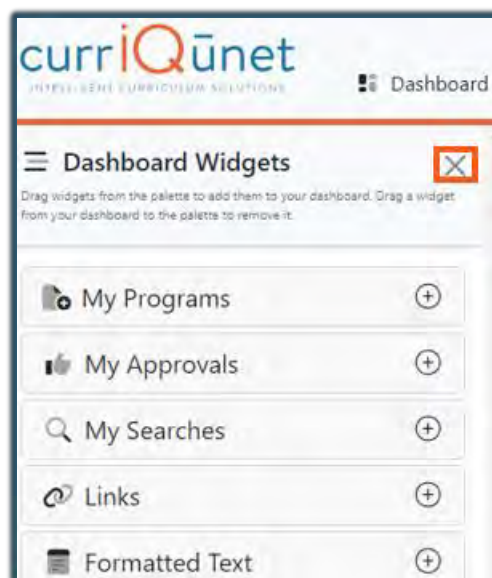


Figure 5-2

If you click within any Widget, Widget Options will automatically open on the right side of the screen. As you can see in Figure 5-3, the Active Widget, or Widget you have clicked into, will have a border around it.

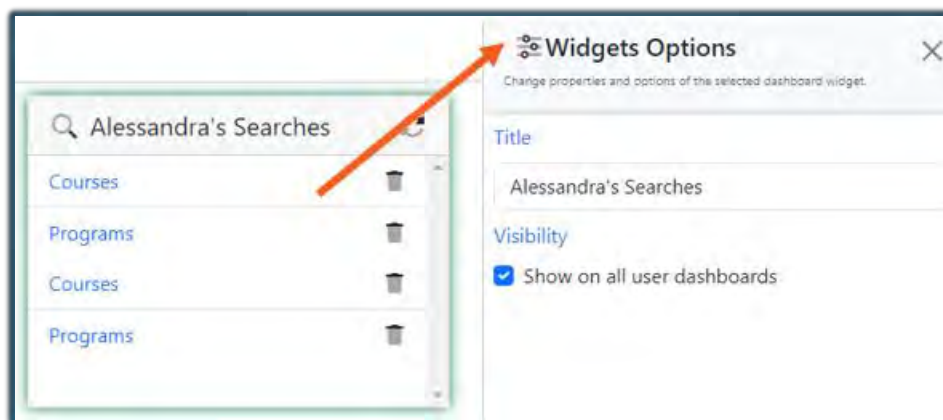


Figure 5-3

## 5.1 Add a Widget – General Information

Follow these steps to Add a Widget to the body of the page.

1. ↗ Click on the Context Navigation located on the left rail of the screen.



Figure 5.1-1

2. ↗ Click and hold anywhere on the widget while dragging it to the Body of the screen.
3. You will see an orange shadow box appear once the widget is able to be placed in a specific location.  
↗ Let go of the click and the Widget will be added in that location.

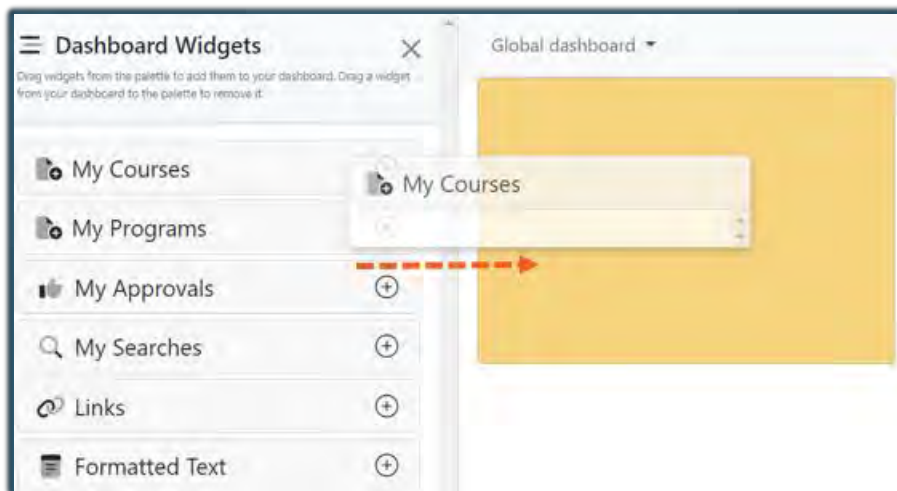




Figure 5.1-2

4.   Once the Widget has been added, you can begin customizing the Widget options.

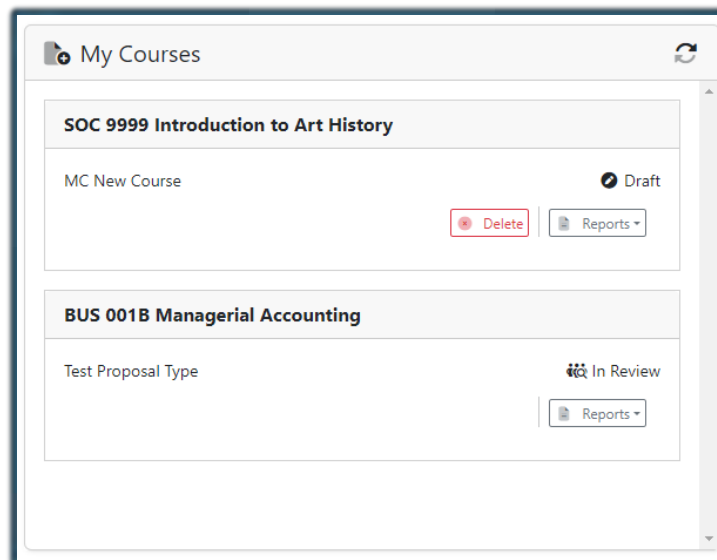


Figure 5.1-3

After a Widget has been Added, it will no longer appear in the Dashboard Widgets selection menu. The only exceptions are for Links and Formatted Text, as you can have numerous of these Widgets.

For example, in Figure 5.1-4, My Programs was added to the body of the site from the Dashboard Widgets menu, which is why it no longer appears on the list.

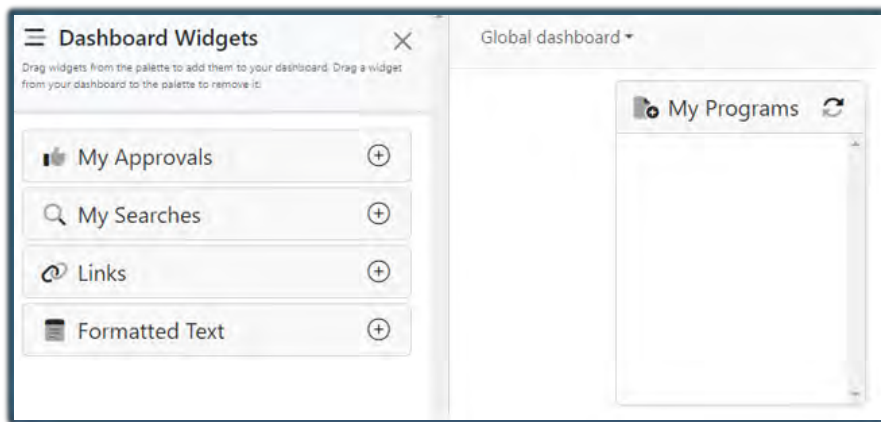


Figure 5.1-4

## 5.2 Widget Options – General Information

Click, drag, and drop any available option from the Dashboard Widgets to the body of the page. The shaded orange box will appear indicating where the Widget will be dropped.

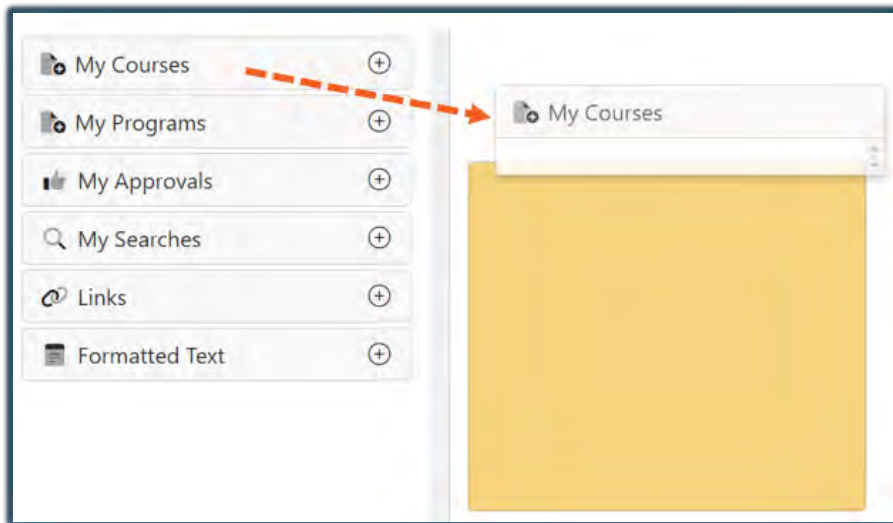


Figure 5.2-1

When you have selected any Widget in the body of the page, you can make adjustments to the Widget Options within the Properties portion of the screen which is located on the right side of the screen. You can also click directly on the Properties icon and then click directly on a Widget to make revisions.

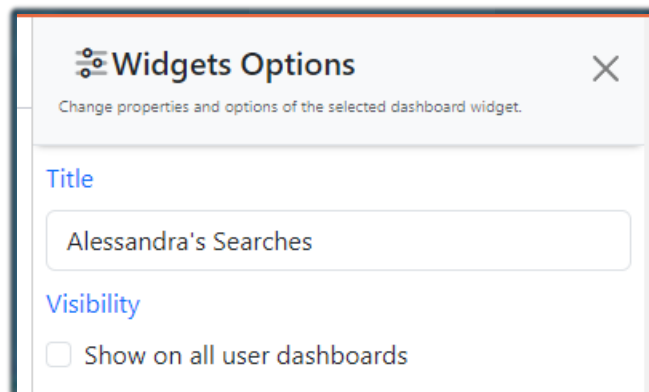


Figure 5.2-2

- **Title** – What you type into the Title box within Widget Options will appear as the Widget Title.

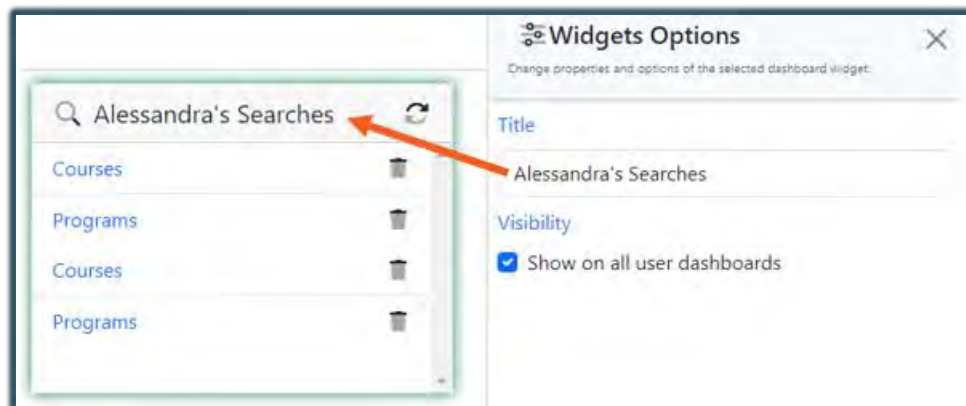


Figure 5.2-3

- **Show on all User Dashboards** – Tick Show on All User Dashboards to include the Widget on all User's Dashboards at your institution. The presentation of the Widget (size and position) will display the same on other Dashboards as yours, however the Widgets can be adjusted per each Dashboard, so customize your own Dashboard as you see fit.

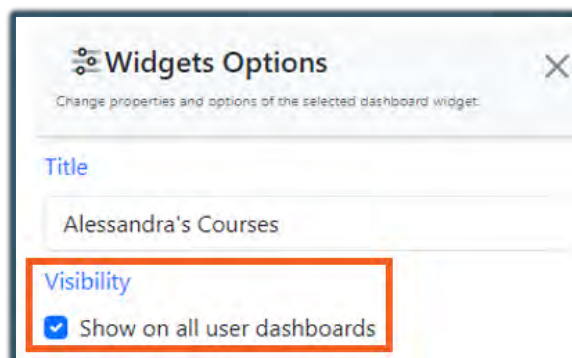


Figure 5.2-4

To close Widget Properties, simply click on anywhere that is not a Widget in the Body of the screen, or click the X located at the top right of the properties box.

**Information:**

*Widget Options cannot be modified unless the Dashboard Widgets is open.*

### 5.3 Available Widgets

Below is a brief description of the available Widgets. You will be given more detail about each Widget later on in this User Guide.

The following Widgets are available to Add to the site:

- [My Courses](#) – If a faculty member is logged in with their Username, and this Widget is added to their Dashboard, their Course Proposals that have been initiated or launched will be populated.
- [My Programs](#) – If a faculty member is logged in with their Username, and this Widget is added to their Dashboard, their Programs will automatically populate.
- [My Approvals](#) – If a faculty member is logged in with their Username, and this Widget is added to their Dashboard, all the Approval Processes the faculty member is part of will populate.
- [My Searches](#) – When a faculty member is logged in with their Username and this Widget is added, all their Saved Searches will automatically populate within the Widget.
- [Links](#) – The system Administrator can add Links.
- [Formatted Text](#) – Add this Widget to the page to add content via a rich text editor which contains the ability to bold, add links, add tables, etc.
- [Login](#) – Add this Widget to the Public Dashboard if you choose to have a secondary place to Login.

#### 5.3.1 My Courses

The My Courses Widget will populate with all of your Proposals and also those which are pending your Approval.

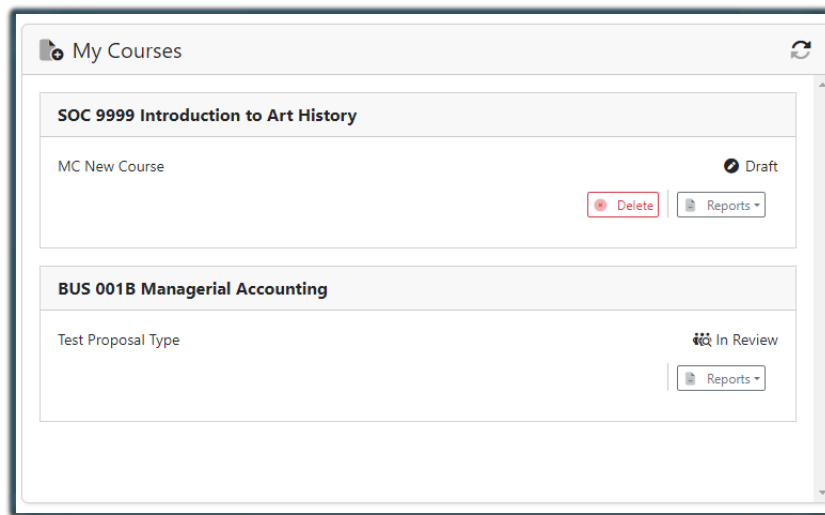


Figure 5.3.1-1

### 5.3.2 My Programs

Throughout this section of the User Guide, you'll be provided with all the information you will need to understand the My Programs Widget.

Faculty members tend to be associated with a very small number of Programs. The exception to seeing many programs populated would be a department head or division head being assigned as a co-contributor.

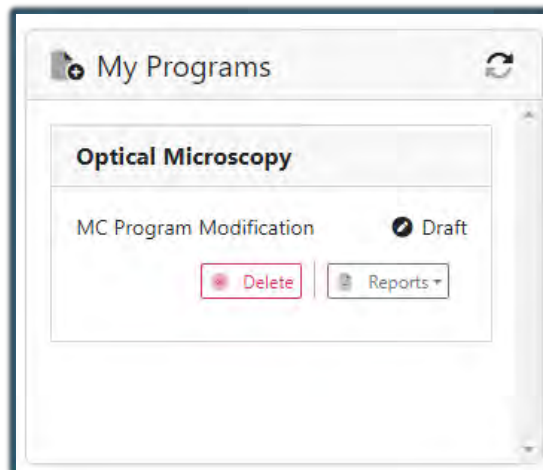


Figure 5.3.2-1

#### Use case:

Faculty members tend to be associated with a very small number of Programs. For example, if you are a Professor of Geology, Sciences, or something similarly named, may populate as a Program..

### 5.3.3 My Approvals

As you just learned, the My Approvals Widget displays all the Courses or Proposals that you have launched into a Workflow. Essentially, these are the items that you are looking for Approval on, as you are associated with these items. So, because of your Role, and your allocated Permissions, you have a function within the Workflow. Those items are listed within the My Approvals Widget. These are the same Courses or Proposals that will display within Approvals which will be discussed at a later time in this User Guide.

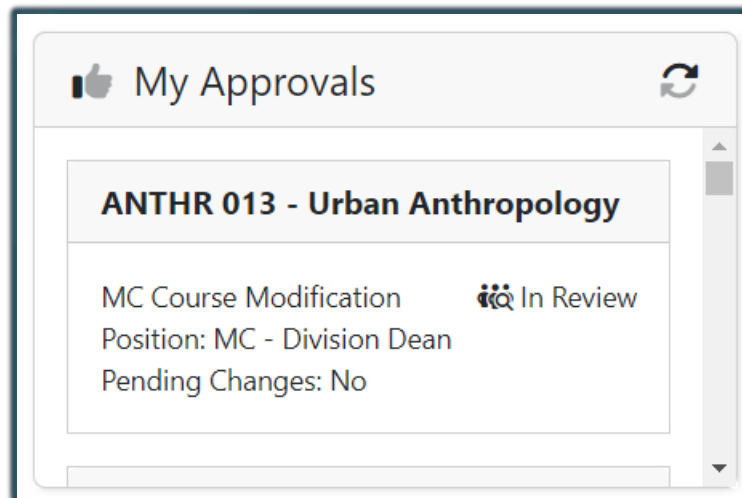


Figure 5.3.2-1

#### Use case:

*Someone may be on an Approval Board, or designated as an Approver, so this Widget could be useful to add to the Dashboard to stay on track with where Workflows stand in your approval queue.*

### 5.3.4 My Searches

All of your Saved Searches will auto-populate into the Widget.

Per Figure 5.3.4-1, when the Context Navigation is open, the Admin has the power to Delete ad hoc Saved Searches. When the Context Navigation is closed, you cannot Delete, as the trash cans will not appear.

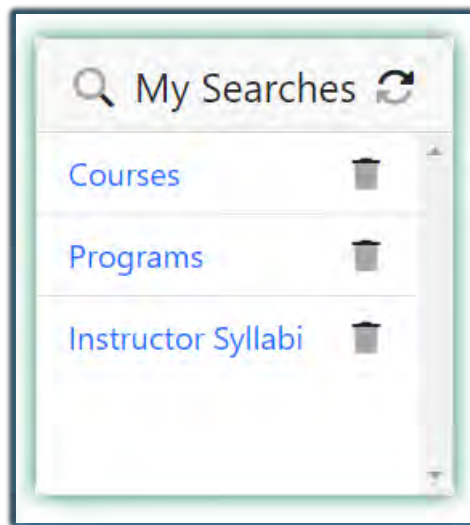


Figure 5.3.4-1

### 5.3.5 Links

To Add a Links Widget to the Dashboard, follow these instructions:

1. ↗ First, click, drag and drop the Links Widget to the body of the screen.
2. ↗ Click the blue Add New Link button within the Links Widget you have dragged into the Body of the screen.

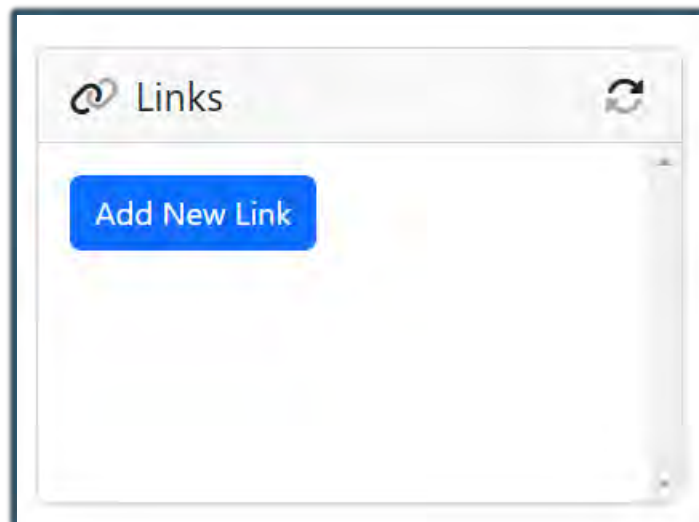
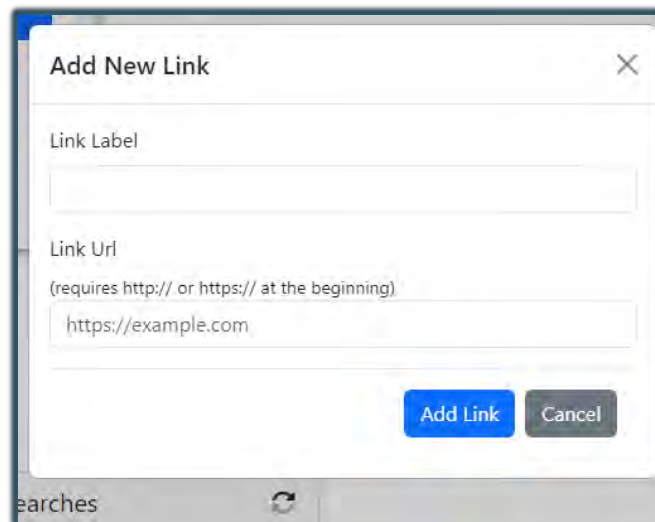


Figure 5.3.5-1

3. 🖨️ Now, the Add New Link window will pop-up. Add the Link Label as you want it to show up on the Widget.

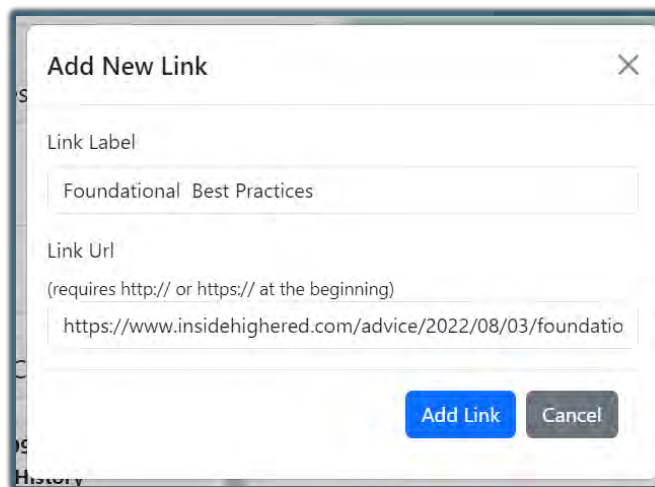
**Information:**  
The Link Label is mandatory.



The screenshot shows a dialog box titled "Add New Link" with a close button (X) in the top right corner. It contains two input fields: "Link Label" which is currently empty, and "Link Url" which contains the text "https://example.com". Below the "Link Url" field, there is a small note: "(requires http:// or https:// at the beginning)". At the bottom right of the dialog, there are two buttons: a blue "Add Link" button and a grey "Cancel" button.

Figure 5.3.5-2

- Next type or paste in the Link URL.



The screenshot shows the same "Add New Link" dialog box. The "Link Label" field now contains the text "Foundational Best Practices". The "Link Url" field contains the text "https://www.insidehighered.com/advice/2022/08/03/foundatio". The "Add Link" and "Cancel" buttons remain at the bottom right.

Figure 5.3.5-3

- Last, click the blue Add Link button.

The Widget has now been updated. The Link Label is hyperlinked and when you click it the URL will open in a new tab.

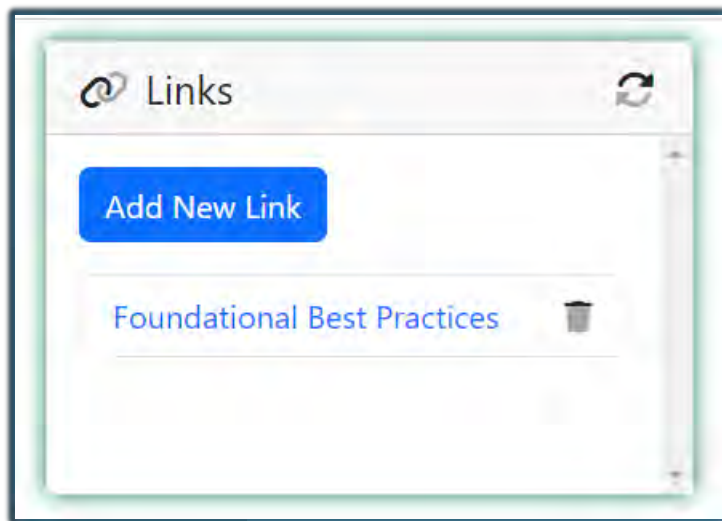


Figure 5.3.5-4

**Information:**

You can add an unlimited number of Links Widgets to the page and you can also have numerous Links within each Links Widget.

**Use case:**

A System Administrator may want to link to different departmental websites, LinkedIn profiles, calendar of events, etc. Think of this as your personal bookmark area, where you can bookmark Links relevant to you.

### 5.3.6 Formatted Text

The Formatted Text Widget allows you to add custom rich text content to the body of the page.

When toggled to the Public Dashboard view, this Widget allows for information to be shared that all visitors will see.

Here's how to Add and use the Formatted Text Widget:

1. ↗ After you have added the Formatted Text Widget to the body of the site hover your mouse over the top portion of the body of the Widget.

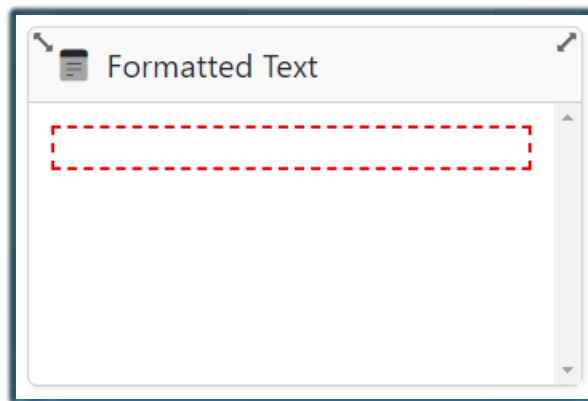


Figure 5.3.6-1

2. ↗ You will now see the dotted line box appear. Click into that box.
3. 📄 The Rich Text editor will appear. Enter the text using the Rich Text editor to format as you desire.

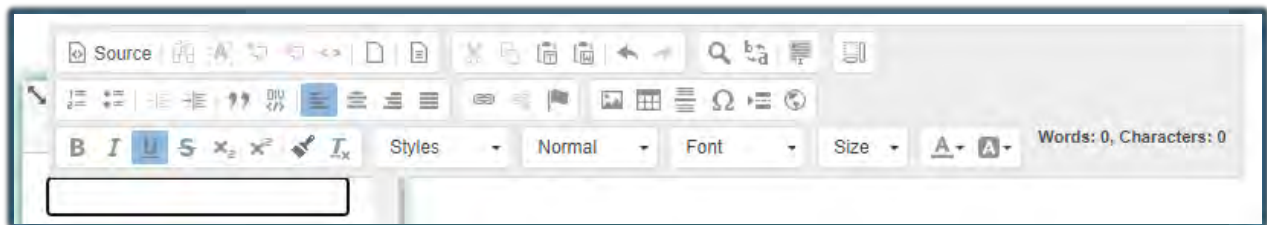


Figure 5.3.6-2

4. ↗ When you have finished, click anywhere outside of the Widget and your changes will automatically be saved.

**Use case:**

*A system Administrator can use the Formatted Text Widget as a means to add a welcome message, announcements, reminders, etc. Think of the Formatted Text Widget as an avenue of sharing information and announcing information.*

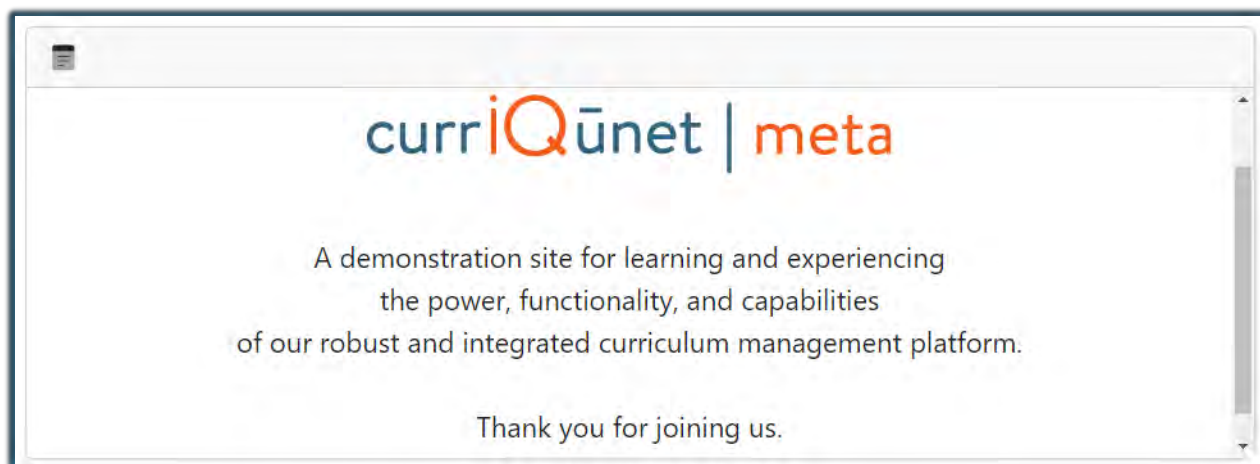


Figure 5.3.6-3

**Information:**

You can add an unlimited number of Formatted Text Widgets to the page. For example, maybe one Formatted Text Widget is a message, and another is a reminder of upcoming holidays, and perhaps another Widget explains who to contact with questions.

#### 5.4 Dashboard Widget Comparison – Public vs. Global Dashboard

See below for a comparison of which Widgets are available on the Public Dashboard and Global Dashboard

Widget	Public Dashboard	Global Dashboard
Links	Yes	Yes
Formatted Text	Yes	Yes
Login	Yes	No
My Courses	No	Yes
My Programs	No	Yes
My Approvals	No	Yes
My Searches	No	Yes

Figure 5.4-1

#### 5.5 Widgets with Elements in Drafted Status

When programs are in Draft Status, you will only see the Delete and [Reports](#) button. You cannot Deactivate or Modify a Draft.

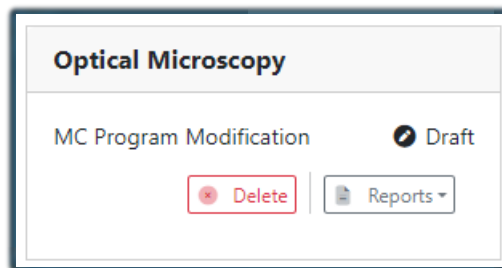


Figure 5.5-1

To make changes to a Drafted Widget element, click on the bolded title. You will now be able to make changes to the Draft.

## 5.6 Edit a Widget

If a Proposal is in Drafted Status, you can make changes to the Proposal by clicking on the Draft Title within the Widget.

As you can see in Figure 5.5-1, when hovering over the Draft Title, the Title becomes highlighted.

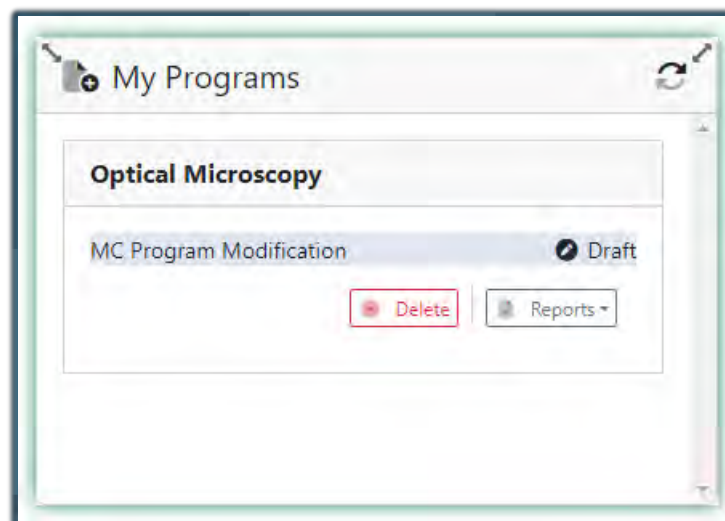


Figure 5.6-1

You can also relocate or resize each Widget. To relocate a Widget, simply drag and drop the Widget to a different location in the Body of the screen. As you drag the Widget, the orange shaded box will appear in the location where the Widget will relocate to once the mouse click is released.

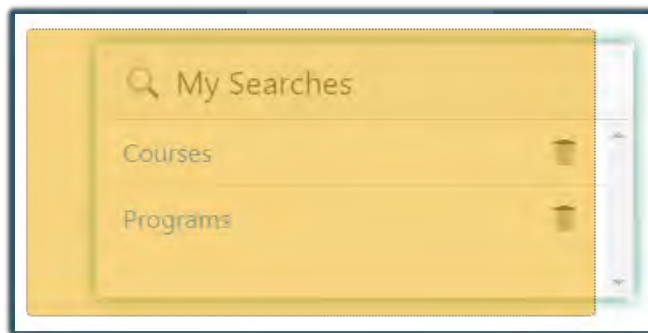


Figure 5.6-2

**Information:**

Widgets cannot be moved unless the Dashboard Widgets is open.

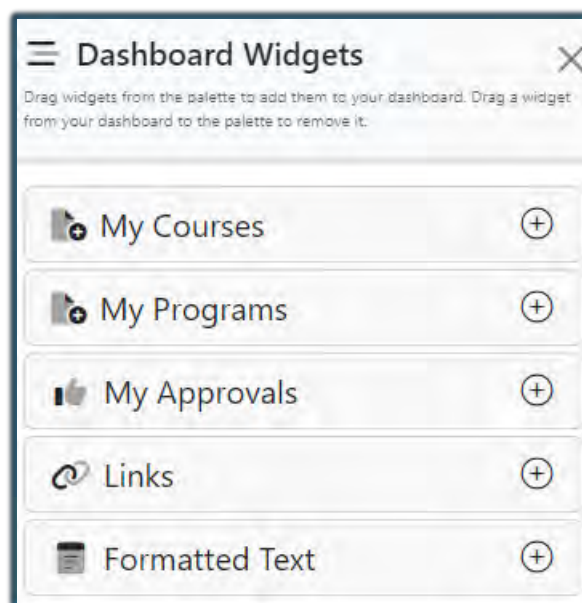


Figure 5.6-3

To resize a Widget, follow these instructions:

1. First, open Dashboard Widgets.

**Information:**

Widgets cannot be altered unless the Dashboard Widgets is open.

2. ↗ Hover your mouse over the Widget.  
You will see the resize arrows appear on the top left and right corners of the Widget.

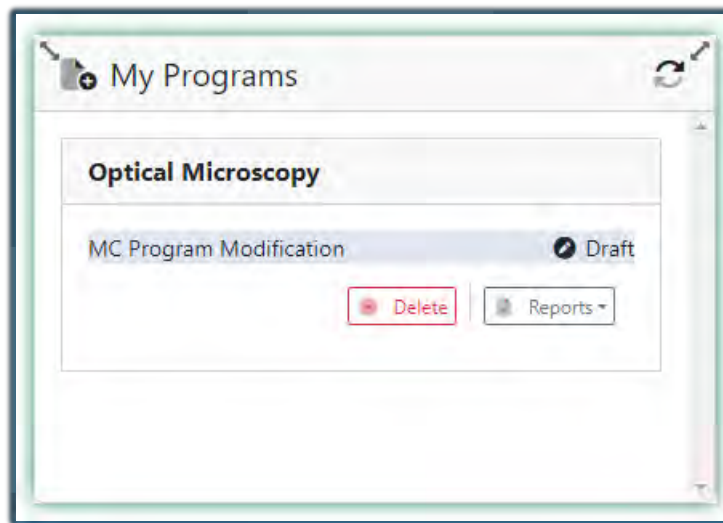


Figure 5.6-4

3. ↗ Click and drag a part of the Widget to adjust the overall size of the Widget including the width and height.

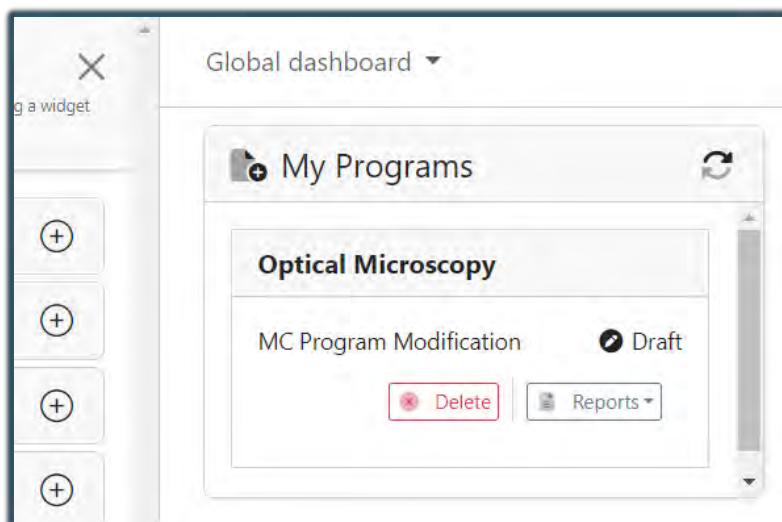


Figure 5.6-5

**Information:**

As you already learned, the site is responsive. As a result, the Widget will also resize responsively.

### 5.6.1 Edit a Widget – General Information

My Courses and My Programs will have the following options contained within their Widgets.

As the buttons are dynamically updated to show only applicable ones, see below for which buttons will be hidden for Draft Proposals.

- **Modify** – If a Proposal is in Draft Status, this button will be hidden.
- **Deactivate** – If a Proposal is in Draft Status, this button will be hidden.
- **Delete** – Clicking Delete will permanently remove any associated information with the Proposal. Deletion cannot be undone.
- **Reports**– Take various Report actions from here.

#### Use case:

*You may want to Delete proposals if duplicate ones were launched, the Proposal was created with the incorrect Proposal Type, or if a Draft Proposal is no longer needed.*

## 5.7 Remove a Widget

Complete these actions to Remove a Widget from the body of the page:

1. ↗ On the body of the page, click and hold anywhere in the Widget title that you would like to remove.
2. ↗ While holding the click, drag the Widget back to the Dashboard Widgets section and release the hold.

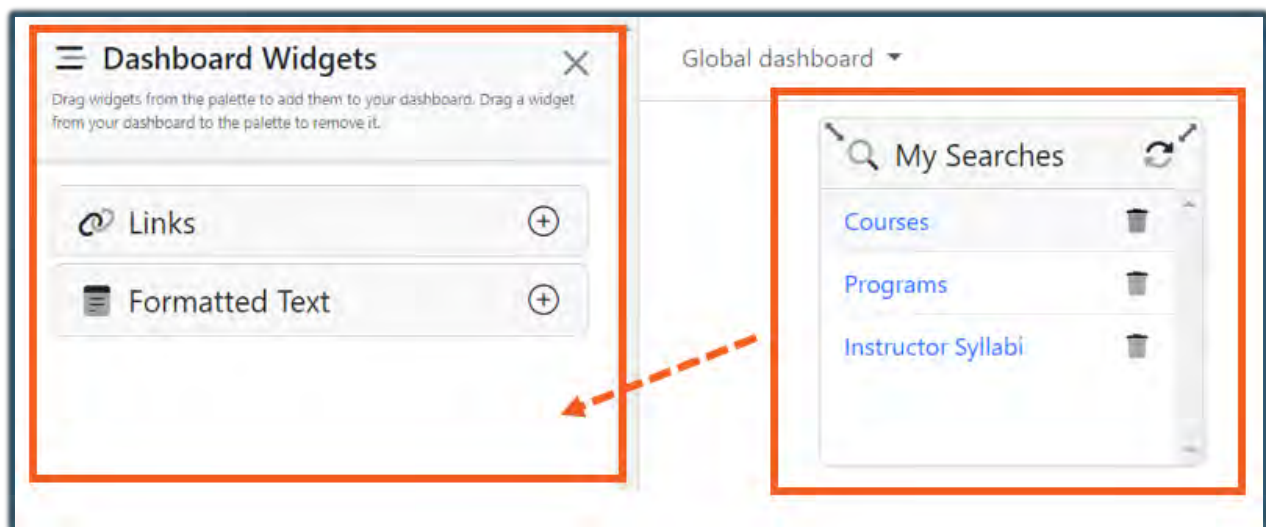


Figure 5.7-1

The Widget will now be removed from the body of the page.

## 6 System Configuration

Within System Configuration, you can do various Administrative tasks such as Assign User Permissions, Create Workflows, Add Users, etc. Within this section of the User Guide, you will be able to gain a complete understanding of the System Configuration portion of the site.

To access System Configuration, click on your Username located at the top right of the screen and then click on System Configuration.

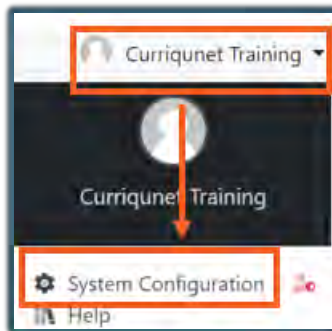


Figure 6-1

Here you can configure the following:

- **Profile** – Add and revise your personal Profile including your password.
- **Position** – Create New Positions and Edit existing ones.
- **Position Groups** – Position Groups are nested Positions.
- **Users** – Configure Users, Positions, Permissions, etc. from here.
- **Workflows** – A Workflow contains the steps that need to occur after a Proposal has been Launched .
- **Proposal Types** – Create and View Proposal Types from here.
- **Lookup Manager** – The Lookup Manager contains a list of Proposal Fields that can be Viewed, Managed, and Edited by an Admin User.
- **Cross Listings** – A Cross Listing is a Course that is identical to another Course located somewhere else at the institution.
- **Action** – View and Create New Workflow Actions.
- **Holiday** – Add Holidays here for reference. These can be known Holidays, or ones your proprietary to your institution. From this tab, you can also define any periods of time you want skipped within a Workflow.

We'll go into detail about the above configurations in the sections to come.

## 7 Profile

The Profile section of the website is where you enter your personal information. This is all the information that is associated with you, as a User.

### **Information:**

*Email, First Name, and Last Name are required.*

#### **Use case:**

- *Having an updated Profile is useful for when someone Searches for your Profile. For example, if a faculty member would like to contact you, they have access to your email, business number, extension and mobile number.*
- *Another reason you may want to update your Profile is if you get married and you can change your last name within your account here.*

To access your Profile, click on your Username located at the top right corner of the screen. An additional window will open. At the bottom left of this window, click Profile.

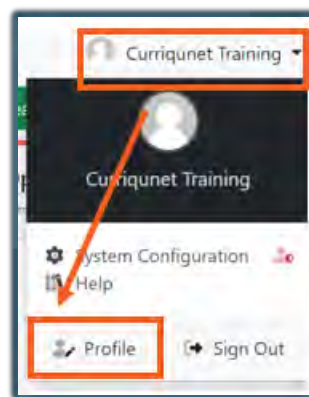


Figure 7-1

### **7.1 Account Info**

If you want to change your password while you are already logged in, here is the place to do it.

To change your Password while logged into the platform, complete these steps:

1. ↗ Within your Profile, simply click the hyperlink ked text beside Password, which reads. Click here to change your Password.
2. You will now be routed to the Change Password page.  
📄 Enter your current Password into the first box.
3. 📄 Enter your new Password into the second and third boxes.

**Information:**

*Passwords must be at least six characters long.*

- ↗ Last, click the Change Password button and your Password will be updated.

### Change Password

Use the form below to change your password.

New passwords are required to be a minimum of 6 characters in length.

Current password

New password

Confirm new password

[Change Password](#) [Cancel](#)

Figure 7.1-1

## 8 Position

Within curriQūnet META there is a hierarchy of Positions – Division, Department and Subject. Within the hierarchy, you can assign Positions to different Titles.

To access Position, first click on Username located at the top right corner of the screen, then click on System Configuration.

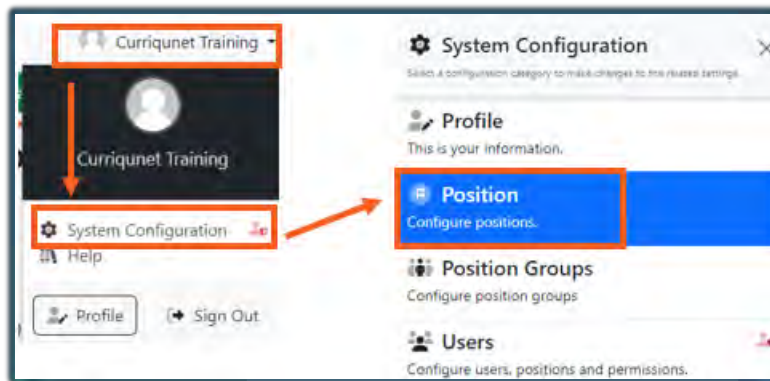


Figure 8-1

### 8.1 Create New Position

Here are the steps to creating a new Position:

1. ↗ Once you have accessed Position within System Configuration, click on the Create New Position button located at the top left side of the Position screen.

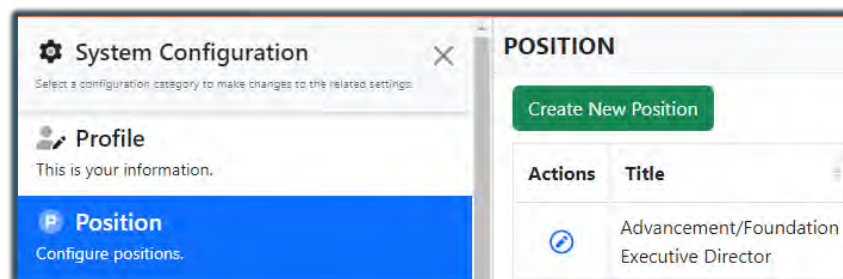


Figure 8.1-1

2. You will now be prompted to fill out the Add New Position Form.  
First, fill in the Title field.  
This Title is what the Position will be labeled.

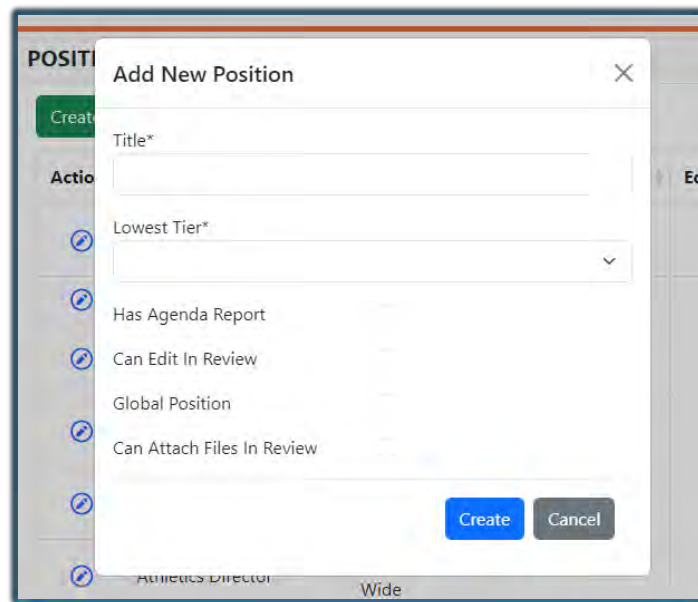


Figure 8.1-2

3. ↗ Next, select the Lowest Tier from the drop-down menu. This Field will dictate which minimum Workflows Users with this Position are permitted to access.
  - **Organization-Wide** – If selected, this Position can View and Edit all items within the entire site.
  - **Division** – If selected, this Position can View and Edit all Division, Department and Subject information within the site.
  - **Department** – If selected, this Position can View and Edit all Department and Subject information throughout the site.
  - **Subject** – If selected, this Position can View and Edit only Subject information.

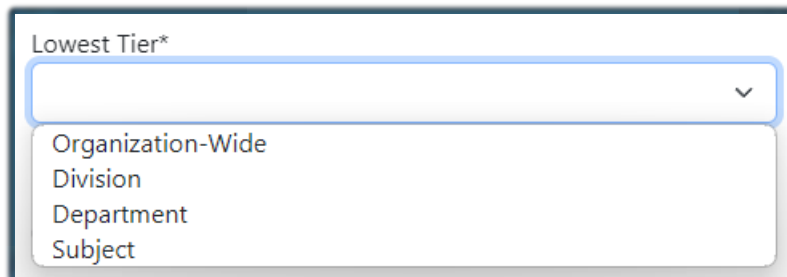


Figure 8.1-3

4. ↗ Select access Permissions for the following:
  - **Has Agenda Report**

- **Can Edit In Review** – During the Review Process, this User is allowed to go in and make changes to the Proposal.
- **Global Position** – Allows all colleges in the district to use this position in their Workflows, regardless of the primary institution.
- **Can Attach Files In Review** – While the Proposal is in Review, the Position can still add attachments.

5. ↗ Last, click the blue Create button located at the bottom right of the Add New Position window.

The Position has now been created and will appear on the list of Positions.

## 8.2 Edit Position

If you need to make changes to an already created Position, simply click the Edit icon beneath Actions for the Position you'd like to revise.



Figure 8.2-1

After you have made your revisions, click the Update button at the bottom right of the Update Position window.

## 8.3 Search for a Position

In the Search bar located at the top right of the Position screen, begin typing in a keyword which may exist within the Position. Search results will dynamically begin to populate as you are typing. In Figure 8.3.1 below, I typed 'tra', so results populated that contained 'tra' within the Position, even if it is not directly within the Title itself

Actions	Title	Lowest Tier	Agenda Report	Edit In Review	Global Position	Attach In Review
	Advancement/Foundation Executive Director	Organization-Wide				
	Associate Dean of Nursing & Allied Health	Organization-Wide				
	Associate Dean, Financial Aid and Records	Organization-Wide				

Figure 8.3-1

## 8.4 Position Example Explained

In the below example, I have searched for Training. One result was returned. The title of the result is Training Direct. The Lowest Tier of Permissions allowed is Division. Access Permissions

allowed are Edit in Review and Global Position.

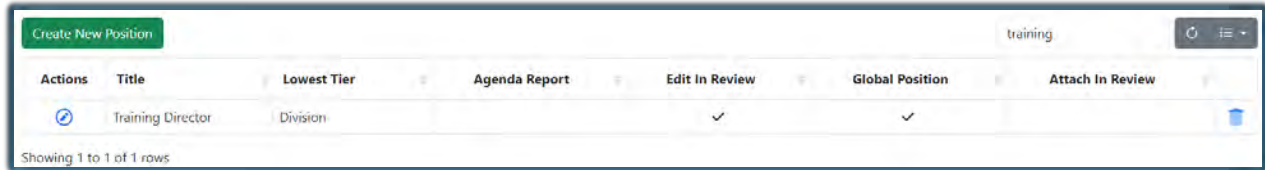


Figure 8.4-1

## 8.5 Delete Position

Follow these instructions to permanently Delete a Position:

1. ↗ If you would like to permanently Delete a Position, click the trash can icon located to the right of the Position you'd like to Delete.

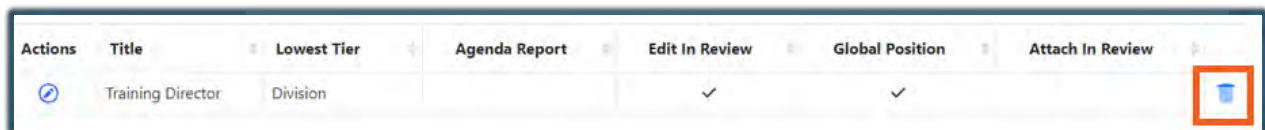


Figure 8.5-1

2. The Delete Position window will pop-up.  
↗ Confirm you indeed want to permanently Delete the Position and then click the Delete button.

## 9 Position Groups

Navigate to Position Groups via System Navigation.

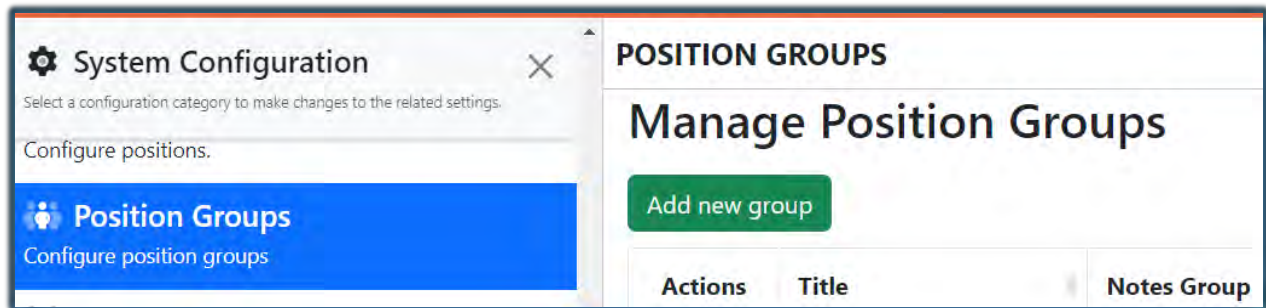


Figure 9-1

A Position Group is essentially a nested Group of Positions within a Workflow. In order for something to be considered a Position Group, there must be more than one User assigned a Position.

### *Use case:*

*The President, Division Dean, and Vice President all want to be included in a Position Group which is included in some or all of the Proposal.*

Once on this page, you will see any existing Position Groups, and have the option to [Add New Position Group](#), Search, etc.

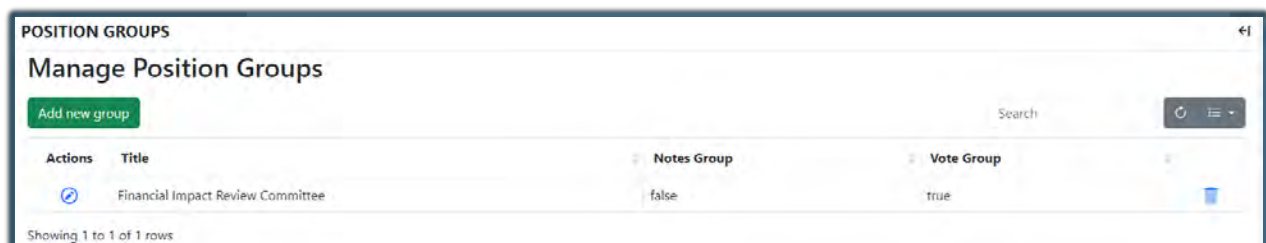


Figure 9-2

### 9.1 Add New Position Group

Here are the steps to Add a New Position Group:

1. ↗ First, click the green Add New Group button which is located at the top left of the Position Groups screen.
2. You'll now be prompted to Create the associated Workflow.  
📝 Type in the New Position Group Title.

- ↗ From the Positions drop-down menu, select the Positions you'd like to be included in the New Group.

**Information:**

If you'd like to Delete an added Position from the list, simply click the trash can icon located to the left of that position.

- ↗ For each selected Position, tick the box(es) with the permission(s) you'd like to grant.
  - **Note** – Members within a group can generate Notes about a particular Proposal that is only seen by that group. This note is not public and can only be viewed by select Users. It allows for the group to have asynchronous communication. For example, Users can selectively communicate with each other via the Note. If the User has access to viewing Notes, they will be displayed via Comments within Proposal History.
  - **Vote** – A Vote action either moves the proposal forward in the Workflow or finishes the Workflow. Vote actions require a target level, or if the action completes the proposal, a target status. Vote agents enable someone to act on behalf of another person

**Use case:**

- If there is a Curriculum Committee at a step in the Approval Process, members of the group can participate in a popular Vote and the Committee Chair can take Action from there.
- If someone is unable to Vote because they are on vacation, another person can be assigned a Vote Agent on their behalf.

- ↗ If applicable, select if you the selected Positions should be part of a Vote Group.

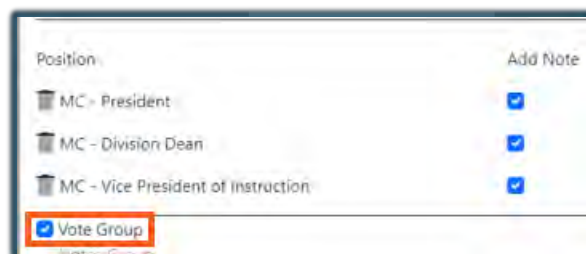


Figure 9.1-1

- ↗ If applicable, select if the Group should be part of a Notes Group.

**Information:**

*Vote Group and Note Group are options enabled by curriQūnet META. If those options are not enabled, they will be grayed out.*

- ↗ Last, click the Save button.

**Information:**

*There is no limit to how many Positions there can be within a Position Group.*

**Use case:**

*Start and end dates may be used for temporary positions, visiting faculty members during a specified period of time, etc.*

## 9.2 Position Groups Example Explained

In the example below, the Position Group is called Financial Impact Review Committee. The Positions Added are President, Division Dean, and Vice President of Instruction. Each Position has been assigned the Permission to Add Notes, Delete Notes, and Permission to Vote. Each Position is also part of a Vote Group.

Title *					
Financial Impact Review Committee					
Positions *					
--Add Position --					
Position	Add Note	Edit Note	Delete Note	Vote Agent	Manage Reviewers
MC - President	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MC - Division Dean	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MC - Vice President of Instruction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Vote Group					
<input type="checkbox"/> Notes Group					

Figure 9.2-1

# curriQūnet | meta

## 10 Users

To navigate to Users, first click on your Username located at the top right of the screen and then click on System Configuration. Depending on your User Permissions, Users may or may not appear in the left rail per the Figure below.

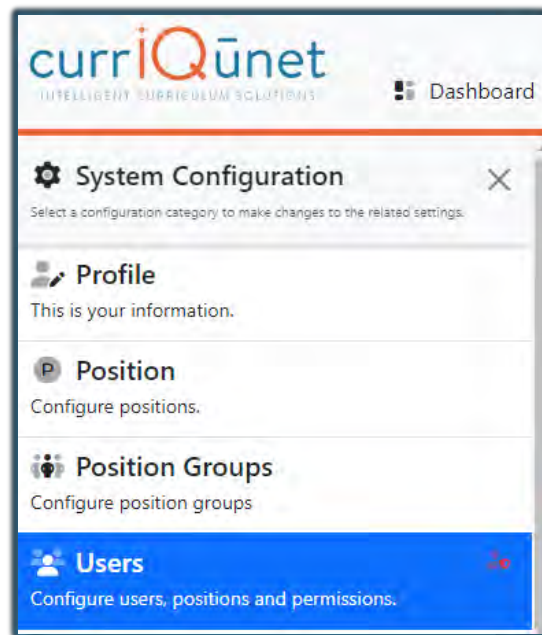


Figure 10-1

Here is a snapshot of the Users page.

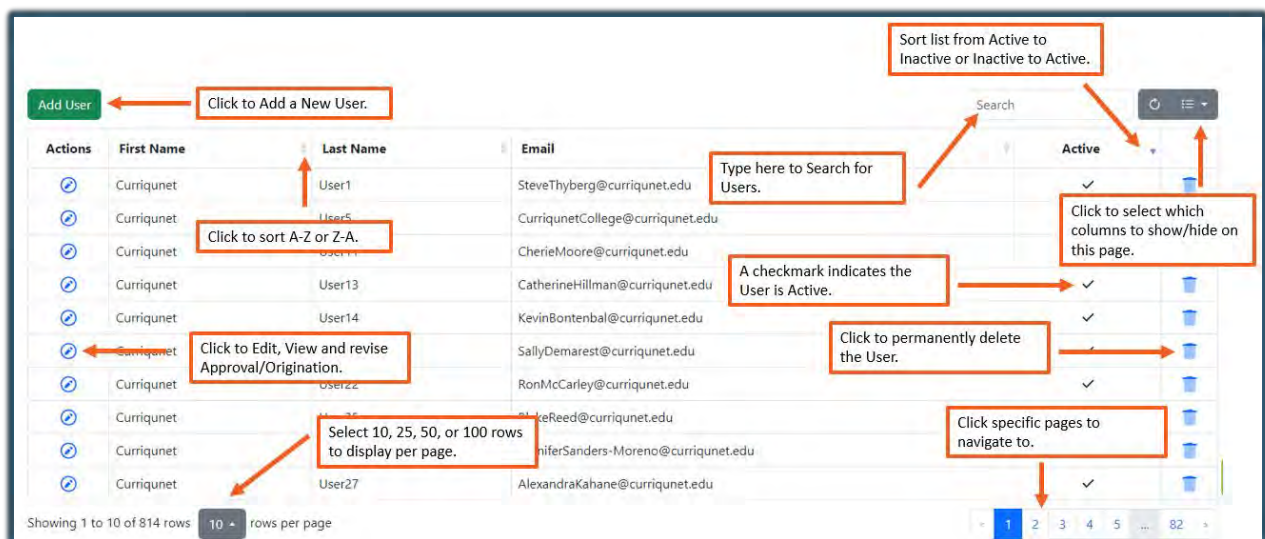


Figure 10-2

## 10.1 Edit Users

Under the Actions column, click the pencil icon to Edit a User.

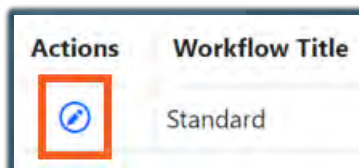


Figure 10.1-1

From here you can Edit the User Permissions, [Approval Permissions](#), and [Origination Permissions](#). Tick option(s) to give respective Permissions.

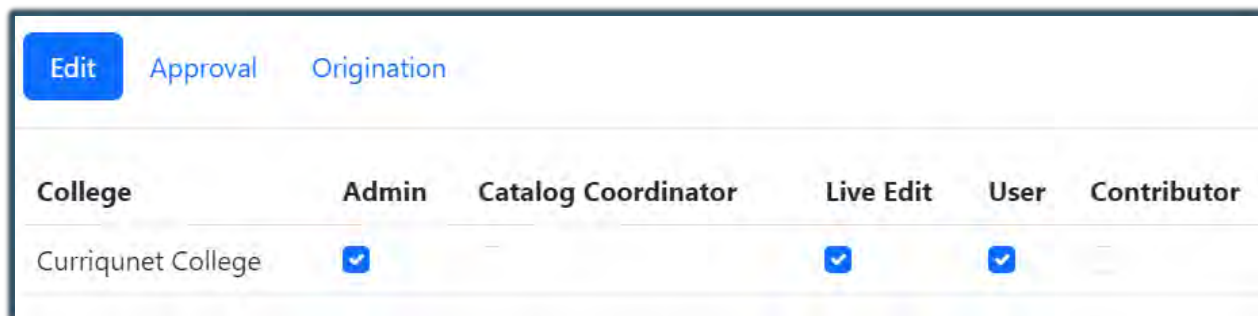


Figure 10.1-2

Aside from Editing a User Profile, you can also Edit [User Roles](#) under the Edit option.

By default, [Approval Permissions](#) are institution-wide and need to be restricted and/or Filtered to the correct departments, or the User will be involved in all Workflows.

### 10.1.1 User Roles

The following User Roles are available:

- [Admin](#)
- [Catalog Coordinator](#)
- [Live Edit](#)
- [User](#)
- [Contributor](#)

#### Admin

An Admin User is the Administrator of the curriQūnet META system at their institution. They may add and remove Users, assign Permissions, View Proposal Forms, etc. Admin users have universal [Origination](#) and [Approval](#) rights. They can create Proposals in any area of the

institutional chain of command. They can also take Action on behalf of other Users in any Approval Workflow and move the Proposals back in an in-process Workflow to be revisited.

Admin users can Edit any Proposal in the system, including those with Active and Historical Status, unless the Forms are specifically restricted during the implementation Process before going live.

Admin users must be given [Approval Permissions](#) to be specifically included in Workflows but can take Action on behalf of other users in any Workflow. There can be as many Admin Users as an institution requires, but there must be at least one. Generally, the only people who communicate directly with curriQūnet and the curriQūnet support team are Admin Users, and all other Users should contact the Admin users to have their questions and concerns addressed. In short, an Admin has the highest level of Permission at the institution within the curriQūnet META platform.

***Use case:***

*Anyone who needs full Permissions to manage any part of the website should be assigned as an Admin.*

## **Catalog Coordinator**

If your institution has the Catalog module, a User assigned with Catalog Coordinator Permissions can Create Catalog Proposals, Edit Catalog Proposals, assign Users, etc. Think of this as an Admin Role, specifically for Catalog tasks.

***Use case:***

*Someone on the campus is responsible for having the Catalog created, reviewed and published. Within the process, there can be Workflows and User assignments. Parts of the Catalog can be broken up and sent to different groups of people to review and approve. A Catalog Coordinator eliminates having to give a person Admin Permissions to do Admin level Catalog module tasks.*

## **Live Edit**

The Live Edit Role gives a User the power to Edit any Proposal at any time, in any Status or department, as an Admin User does. This does not permit them the other responsibilities and privileges of an Admin User.

If you want a User with a certain Position in the institution to be able to Edit Proposals only while they are on their step in the Workflow, the Live Edit flag can be added to the Position

instead of the User. This means that a User can only make changes to the Proposal when acting in that specific Role on Proposals on that step in the Workflow.

**Use case:**

*When the Proposal is on the Department Chair step of the Workflow, the Department Chair might have Live Edit Permissions so they can answer questions about the departmental budget or make typo corrections.*

## User

All users in the curriQūnet META system must be assigned the User Role in order to be in Active Status. It is assigned by default, and if it is removed, the User will not be able to Login or Create any Proposals. Users must be assigned [Origination](#) Permissions to Create Proposals, and [Approval Permissions](#) to participate in Approval Processes. In a district system, Users must be assigned the User Role at any college they will participate in Creating or Approving Proposals.

## Contributor

A Contributor is a User who will be assigned and able to View Proposals but will not be able to create Proposals on their own. This Role is for informational functions. If a User with the Contributor Role is assigned [Origination](#) Permissions, they will be able to create Proposals.

**Use case:**

- *An accreditation team is on campus for a few weeks and while they are present, they want Contributor Permissions so they can review approval dates, but not make any changes.*
- *Someone from the community may want to View a Proposal but not be able to take Action.*

## 10.2 Active/Inactive Users

There are two different Statuses for a User, either [Active](#) or [Inactive](#).

- **Active** – These people can use the site on a regular basis. When accounts are Active, a checkmark will appear in this field. For more information on Activating a User, click [here](#).

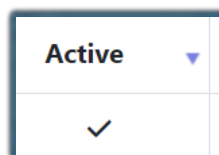


Figure 10.2-1

- **Inactive** – If an account is Inactive, nothing will appear beneath Active for that person within the Users section of System Configuration. For information regarding Deactivating an account, click [here](#).

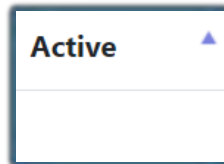


Figure 10.2-2

#### Use case:

*If a faculty member goes on sabbatical or a leave of absence their account should be made Inactive.*

### 10.2.1 Activating Accounts

You can easily Activate a User's account.

These are the steps to put Users into Active Status:

1. ↗ First, navigate to System Configuration.

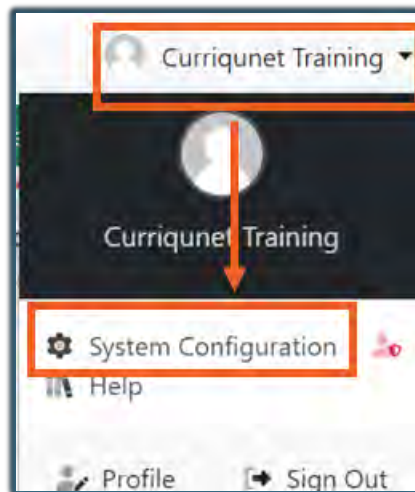



Figure 10.2.1-1

2. ↗ Click on Users which is located on the left side bar of the System Configuration list.
3.  Search for the User you would like to Activate.  
The Search option is located at the top right of the System Configuration screen.
4. ↗ Click on Activate button under Actions for the desired User.

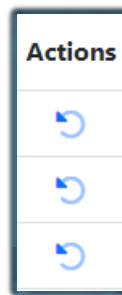


Figure 10.2.1-2

5. You will now be prompted to verify the Activation.  
↗ Click Yes if you would like to move forward with the Activation.

The User has now been Activated. Because this User's Profile has been set to Active, a checkmark indicating an Active Status on the Users System Configuration page will now appear.

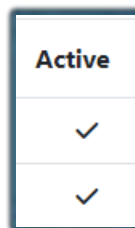


Figure 11.2.1-2

## 10.2.2 Deactivating Accounts

Follow these steps to put Users in Inactive Status:

1. ↗ First, navigate to System Configuration.

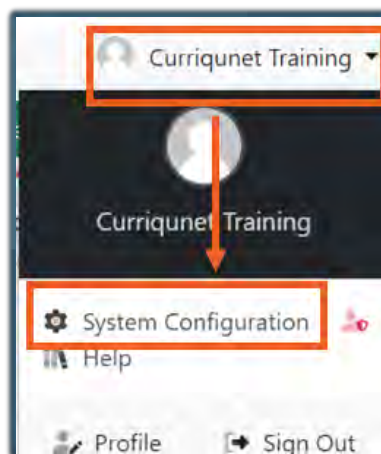


Figure 10.2.2-1

2. ↗ Click on Users which is located on the left side bar of the System Configuration list.
3. 📄 Search for the User you would like to Activate.  
The Search option is located at the top right of the System Configuration screen.
4. ↗ Click the Edit button (pencil icon) under Actions for the desired User.



Actions	First Name	Last Name
	Curriqunet	User1
	Curriqunet	User5

Figure 10.2.2-2

5. ↗ On the next window, untick the box under User.
6. ↗ Scroll to the bottom of the window and click the blue Save button.

The User is now Deactivated. As the User's Profile is no longer in Active Status, there will not be a checkmark under Active on the User's System Configuration page.

### 10.3 Add User

To add a new User, follow these instructions:

1. ↗ Click on the green Add User button located just to the right of the System Configuration menu to Add a New User.

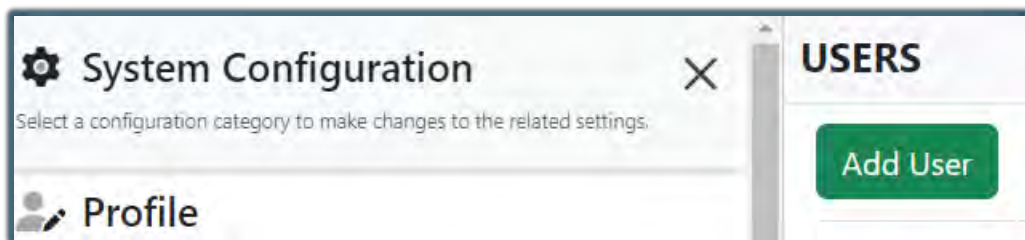
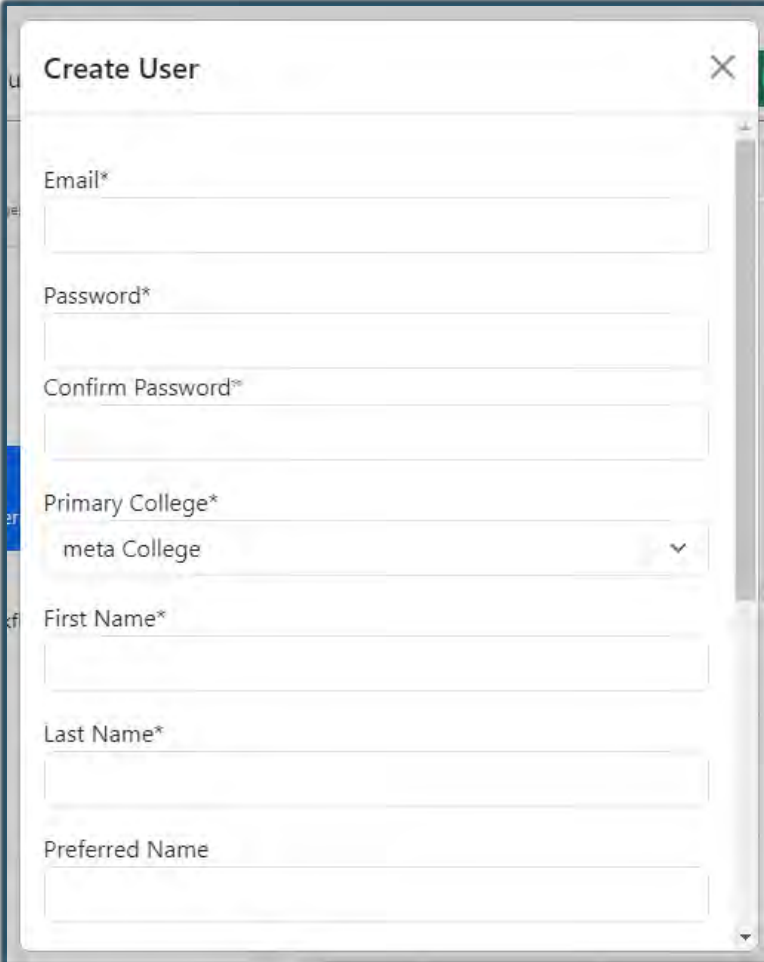


Figure 10.3-1

2. A Create User window will pop-up.  
📄 ↗ Fill out the relevant fields.



The screenshot shows a 'Create User' dialog box with the following fields:

- Email\*
- Password\*
- Confirm Password\*
- Primary College\* (dropdown menu with 'meta College' selected)
- First Name\*
- Last Name\*
- Preferred Name

Figure 10.3-2

- **Email** – This is what is used when logging in.
  - **Password** – A temporary password is set-up. Once a User has access to their account, they will be prompted to reset their password.
  - **Primary College** – If the school is part of a district, the specific part of the school can be selected
3. ↗ Click the Create button located at the bottom of the form.  
If you click Cancel, the window will close, and your modifications will not be saved.

Upon clicking the Create button, the Email address entered will receive an email indicating their curriQūnet account has been created. The email will include a temporary password and upon logging in for the first time, they will be prompted to change their password.

## 10.4 Approval Permissions

In short, Approval Permissions will dictate what a User can do within the platform.

Particularly, Approval Permissions give a User the ability to be part of the Approval Process for certain Proposals, or all Proposals, dependent on the Position. The User must have a Position assigned and must be part of the Proposal's Workflow in order for the User to take Action in an Approval Process.

Click Approval to Edit current Permissions and Add Permissions. If any Approval Permissions have been added, they will display here.

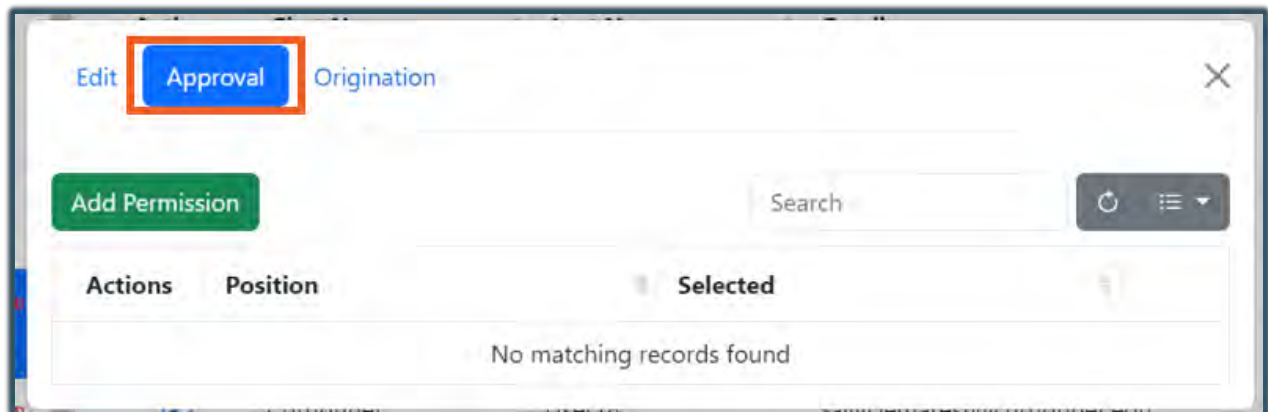


Figure 10.4-1

Follow these steps to Add an Approval Permission:

1. ↗ Click the green Add Permission button.
2. An Add Permissions pop-up window will appear.
  - ↗ From the Position drop-down menu, select the applicable Permission.

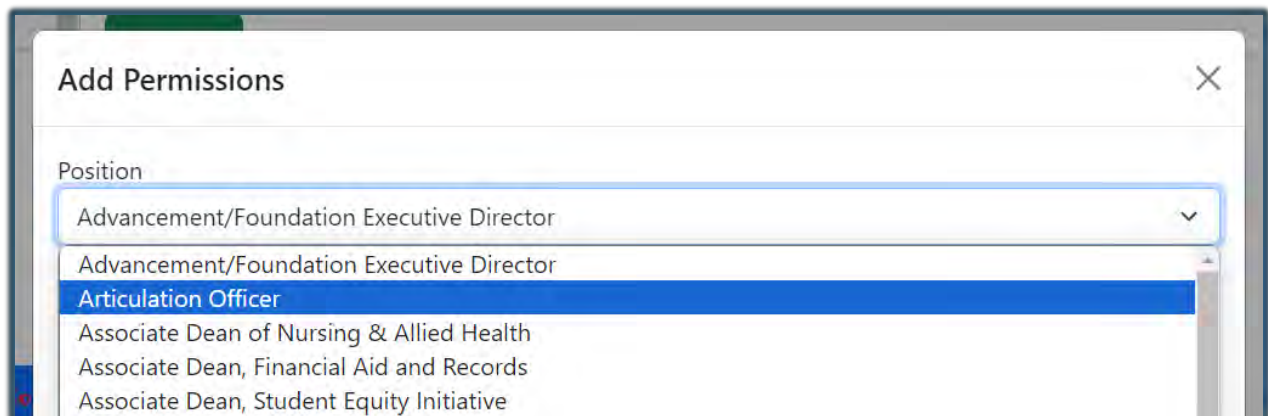


Figure 10.4-2

- ↗ If the Position has Filters beneath it, select the relevant option from the drop-down. If the Position does not have Filters beneath it, skip to [step 5](#).
- Based on what you select to Filter On, the list below the Start/End Date will update dynamically.  
↗ Select the appropriate option(s).

**Edit Permissions**

Position  
MC - Division Dean

Filter On  
Division

Start Date 11/28/2023

End Date mm/dd/yyyy

- Miramar - Admin Units
- Miramar - Division I
- Miramar - Division II
- Miramar - Division III
- Miramar - Student Services/Non-Instructional

Figure 10.4-3

- ↗ Next, select the Start Date and End Date of the Permission.  
The Permission will only be Active during the specified selected period.

**Information:**

*By default, the Position will be assigned immediately with no end date until manually removed from the User. The default dates are indicated by being grayed out.*

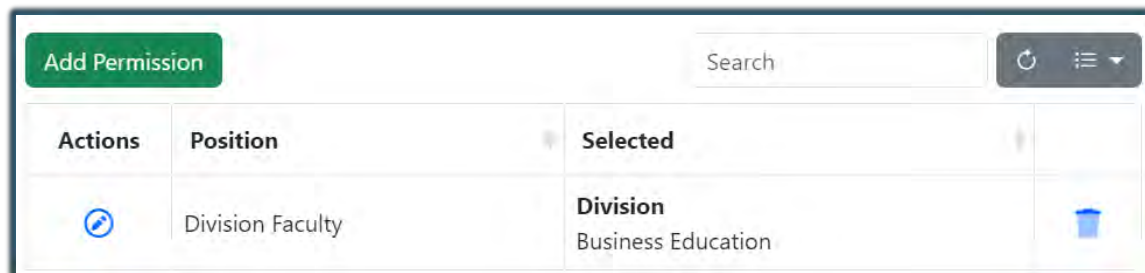
**Use case:**

*Start and end dates may be used for temporary positions, visiting faculty members during a specified period of time, etc.*

6. ↗ Last, click the Save button.

## 10.4.1 Approval Permissions Example Explained 🧑🏻❤️

Per example Figure 10.4.1-1 below, all Users assigned to the Position Division Faculty within the Division of Business Education are only allowed to participate in what was selected within this Permission starting on 6/13/2023 to an unspecified date. (Figure 10.4.1-2)





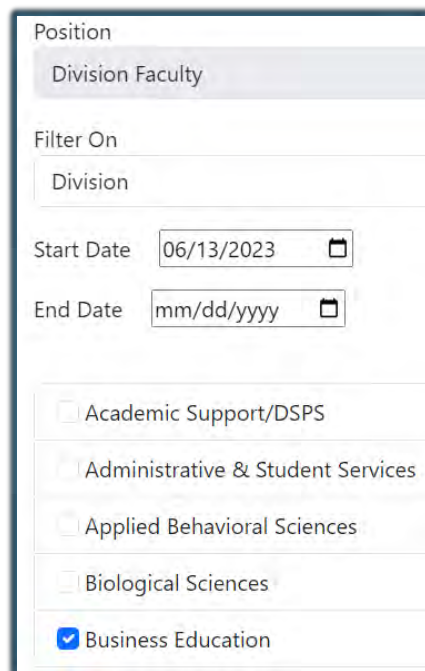

Actions	Position	Selected
	Division Faculty	Division Business Education 


Figure 10.4.1-1



Position  
Division Faculty

Filter On  
Division

Start Date 06/13/2023 

End Date mm/dd/yyyy 

Academic Support/DSPS

Administrative & Student Services

Applied Behavioral Sciences

Biological Sciences

Business Education

Figure 10.4.1-2

## 10.5 Origination 🧑🏻❤️

Origination Permissions give a User the capability to Originate certain Proposals, or all Proposals, dependent on the User's Permissions. A User could be restricted to only Originating Proposals for a certain subject, or only Proposals for subjects and programs within a certain department, and so on.

# curriQūnet | meta

Once you are in this window, you have the option to View any existing Originations, [Edit existing Originations](#), or if you click [Add Origination](#), you can create a new Origination

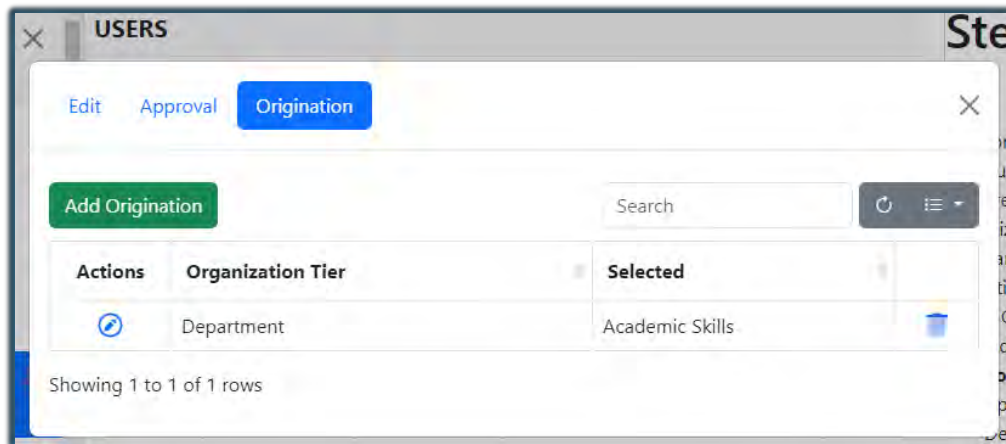


Figure 11.5-1

## 10.5.1 Add Origination

To Add an Origination, follow these steps:

1. ↗ Once in Users, click the Edit icon (pencil) under Actions.
2. ↗ Click the green Add Origination button located on the left side of the window.

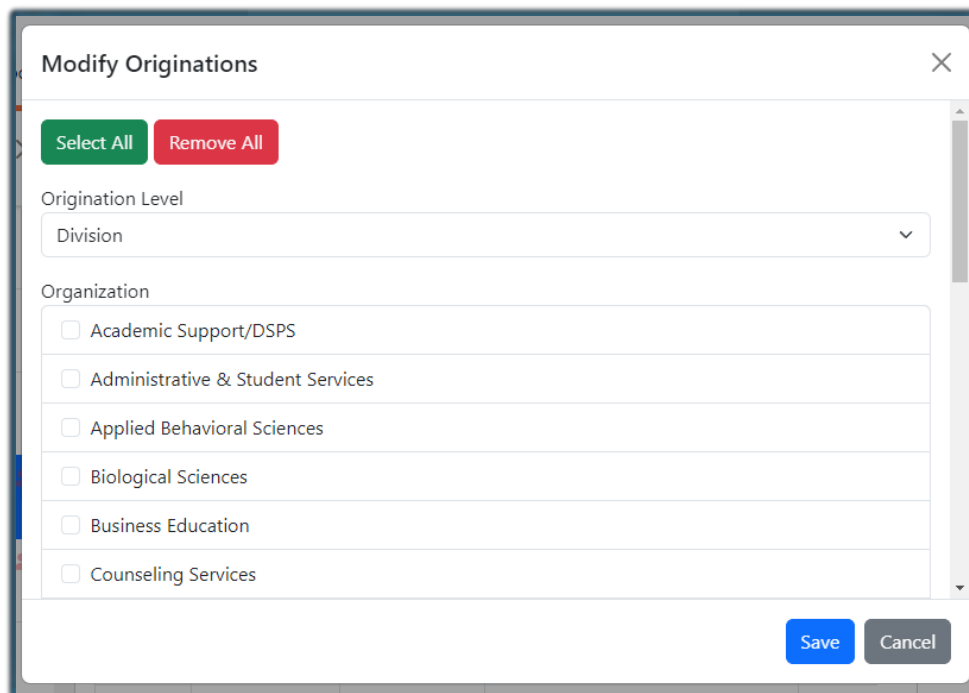


Figure 11.5.1-1

# curriQūnet | meta

1. You are now in the Modify Originations window. You will see a list of what Proposals you are allowed to Originate areas from.
2. ↗ Select the Origination Level from the drop-down menu.  
Depending on how your institution is set up, you may see different options than the below example.j

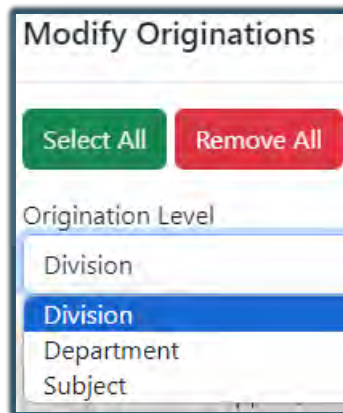


Figure 10.5.1-2

3. The list of available Organizations will dynamically update based on what you selected in the Origination Level drop-down menu.  
↗ Select the Organizations one at a time, or simply click the green Select All button located at the top left of the window to tick all options at once.  
Likewise, you can click Remove All to unselect the ticked options.
4. ↗ Last, click the Save button.  
Your Origination will now appear on the main Origination window.

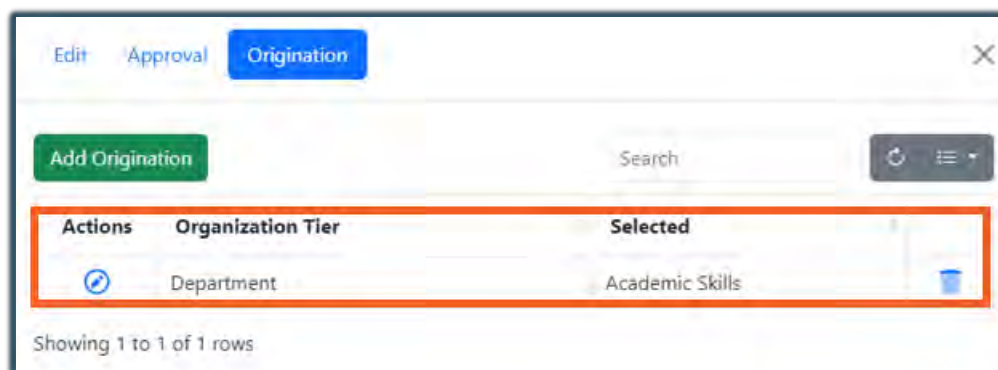


Figure 10.5.1-3

**Use case:**

A new faculty member is being set up in the system and you limit this person's capability to Originate certain subjects or Course codes.

**Information:**

When your institution is being onboarded to the curriQūnet system, you will provide your Organizational hierarchy. Your hierarchy (Divisions, Departments, Subjects) is then populated into the system as a starter list. You can make updates via curriQūnet META's Organizational hierarchy, which you'll learn about in a different section of the User Guide.

### 10.5.2 Edit Origination

To Edit an Origination, simply click the Edit icon located beneath the Actions column. Upon clicking Edit you will navigate to the Modify Originations window.

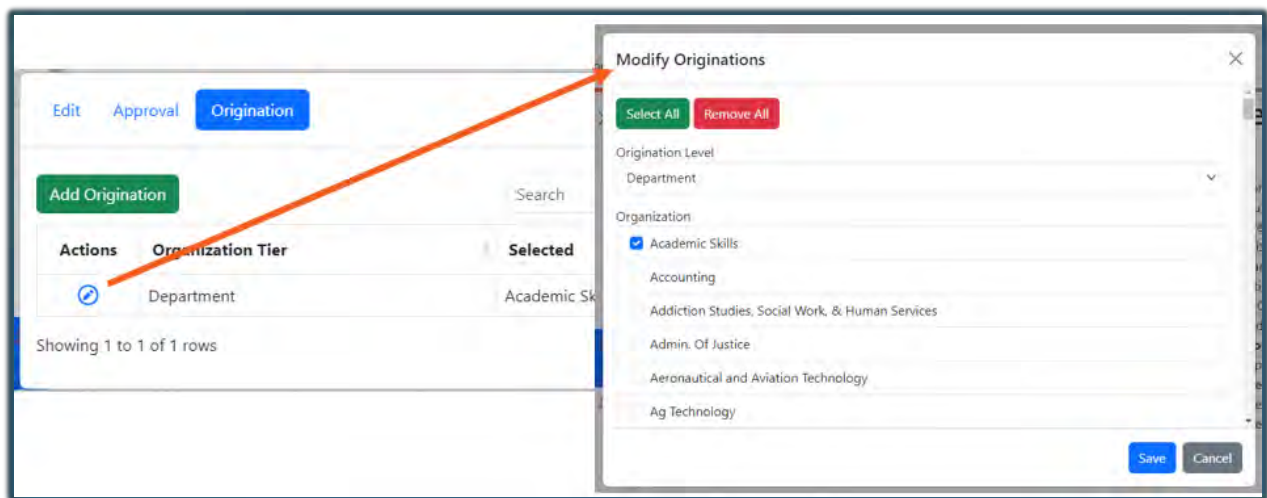
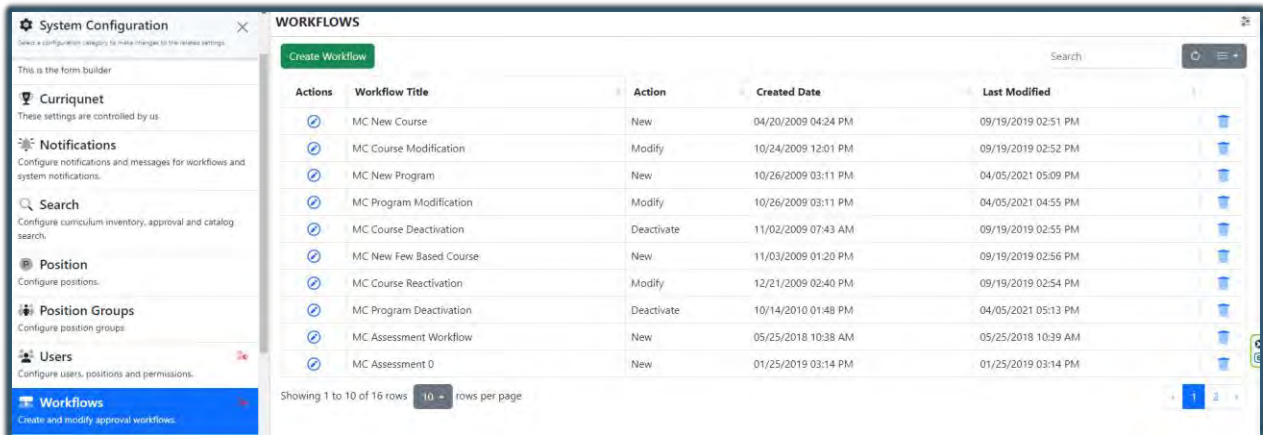


Figure 10.5.2-1

## 11 Workflows

A Workflow contains the steps that need to occur after a Proposal has been Launched. The Workflow Process also determines what Positions are involved in those steps and what capabilities are authorized at those steps.

Once you, the curriculum manager, have navigated to Workflows under System Configuration, you will see the list of all the existing and drafted Workflows you have access to displayed on the Workflows screen.



Actions	Workflow Title	Action	Created Date	Last Modified
<input checked="" type="checkbox"/>	MC New Course	New	04/20/2009 04:24 PM	09/19/2019 02:51 PM
<input checked="" type="checkbox"/>	MC Course Modification	Modify	10/24/2009 12:01 PM	09/19/2019 02:52 PM
<input checked="" type="checkbox"/>	MC New Program	New	10/26/2009 03:11 PM	04/05/2021 05:09 PM
<input checked="" type="checkbox"/>	MC Program Modification	Modify	10/26/2009 03:11 PM	04/05/2021 04:55 PM
<input checked="" type="checkbox"/>	MC Course Deactivation	Deactivate	11/02/2009 07:43 AM	09/19/2019 02:55 PM
<input checked="" type="checkbox"/>	MC New Few Based Course	New	11/03/2009 01:20 PM	09/19/2019 02:56 PM
<input checked="" type="checkbox"/>	MC Course Reactivation	Modify	12/21/2009 02:40 PM	09/19/2019 02:54 PM
<input checked="" type="checkbox"/>	MC Program Deactivation	Deactivate	10/14/2010 01:48 PM	04/05/2021 05:13 PM
<input checked="" type="checkbox"/>	MC Assessment Workflow	New	05/25/2018 10:38 AM	05/25/2018 10:39 AM
<input checked="" type="checkbox"/>	MC Assessment 0	New	01/25/2019 03:14 PM	01/25/2019 03:14 PM

Figure 11-1

- **Workflow Title** – This is the naming mechanism assigned to the Workflow. Each Workflow Title should be unique as it runs a proprietary unique process.
- **Action** – The text beneath the Action header indicates what was done to the specific Workflow. For example, does the Workflow create something New, does it Modify something that already exists, or does it Deactivate something that already exists?
- **Created Date** – This is the Date the Workflow was originally Created on.
- **Last Modified** – This header indicates when the specific Workflow was last revised. If a Workflow was Created, but never changed, this column will remain blank.

### Use case:

- *Some Users may want to **keep** Historical knowledge of Proposals. For example, staff may want to see the Workflow to look back at Courses reviewed and approved internally years ago, but the Dean had never officially approved the Position within the institution.*
- *Suppose a university has a six year plan, so the Workflow will need to be modified every six years. The university could name their Workflow Title '6 Year Plan'.*

## 📘 Information:

curriQūnet META will always keep a Historical record of all Workflows in their entirety. Essentially, there is always an available trace of every step of Workflows, from New, to Modify, to Deactivate.

### 11.1 Approval Workflow

Approval Workflows, sometimes referred to as Approval Processes, define the Process of Approving new curriculums.

Once you click on the Edit button under Actions for the respective Workflow you'd like to View or Edit on the main Workflows page, you will be brought to the Approval Workflow page.

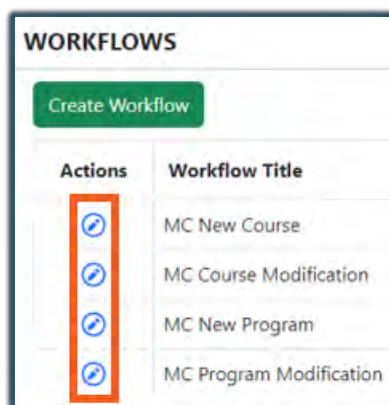


Figure 11.1-1



As you see in Figure 11.1-2 below, The Approval Workflow page contains two sections – Drafts and History.

- **Drafts** – These Workflows are not Active. They can be Edited and Launched when ready.
- **History** – The History section includes the current Active versions of the Workflow. These are the Workflow being used now and the top record will not have an End Date. Active and Historical Workflows cannot be Edited. You can View and Copy Active and Historical Workflows.
  - **Begin Date** – This is the Date the Workflow was Activated. In most cases, this is the same as the Create Date.
  - **End Date** – Once a Workflow is Activated and until a Workflow is Completed, there is no End Date for that Workflow. As a result, when a Workflow is Completed, the End Date will automatically update to the date the Workflow had ended or been deactivated.

**Approval Workflow**  
Workflow: MC Course Modification

**Drafts**

Create draft

Actions	Version Title	Created Date	Last Modified Date
 	test new course	02/10/2022 04:21 PM	02/10/2022 04:21 PM

Showing 1 to 1 of 1 rows

**History**





Actions	Version Title	Created Date	Begin Date	End Date
 	19 September 2019	09/19/2019 10:57 AM	09/19/2019 02:52 PM	
 	1	10/24/2009 12:01 PM	10/24/2009 12:01 PM	12/11/2015 10:11 AM

Figure 11.1-2

## 11.2 Creating a New Workflow

Though you may find it easier to Copy to Draft, sometimes you will need to Create Workflows from scratch.

Here's how you create a brand New Workflow:

1. ↗ Within System Configuration, click the Workflows category on the left-hand side of the screen.
2. ↗ Next click the green Create Workflow button located just below the Workflows heading on the page.

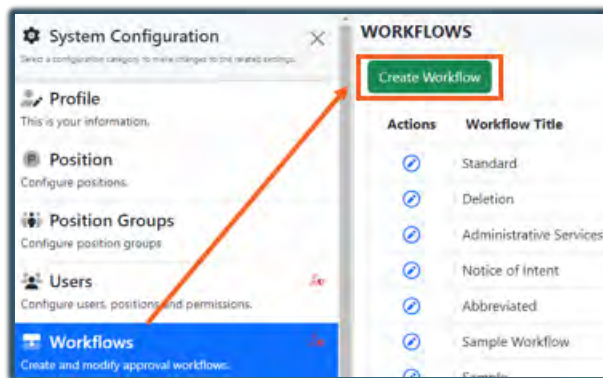


Figure 11.2-1

3. The Create Workflow window will appear.
  - ☰ Create a Title for your Workflow.
4. ↗ Create a Workflow Action.
 

The Action can either be New, Modify, or Deactivate.

  - **New** – The outcome of the Workflow will be to create something New.

- **Modify** – The effect of the Workflow will Create a change, as you can't make changes to Workflows currently in use.

**Use case:**

*You will want to create a Modify Workflow when you want to make a change to an existing Workflow.*

- **Deactivate** – The result of the Workflow will be a Deactivation.

5. ↗ Now click the blue Create button to begin working on your Workflow.

*Figure 11.2-2*

6. The Workflow you began to Create will now be displayed under Drafts on the Approval Workflows page.
- ↗ Click on the Edit button beneath Actions for the Workflow Title you just created.

At this point, you are on the Design Surface where you can design the entire Workflow.

Here's a snapshot of the Workflow Builder page:

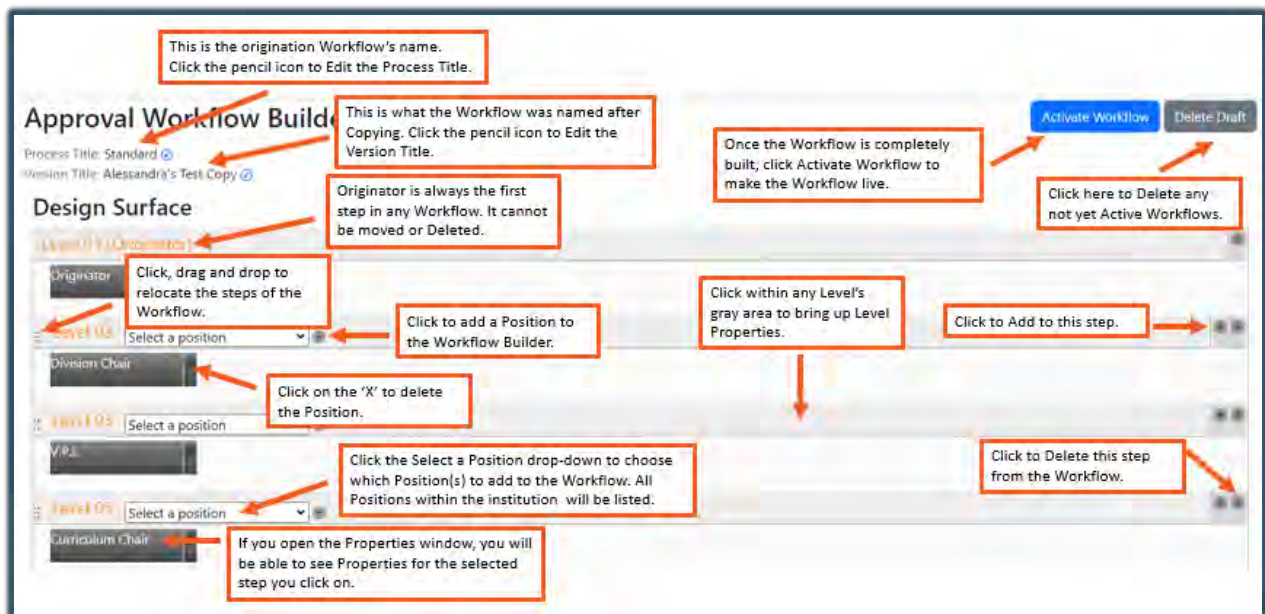


Figure 11.2-3

**Information:**

- Each Workflow will always begin with an Originator at Level 01. The Originator Level cannot be removed.
- The last Level will always be an approval.

7. ↗ Choose the first Position as needed by selecting the Position from the drop-down menu to the right of each Level.  
This drop-down menu will display all Positions available at the institution.

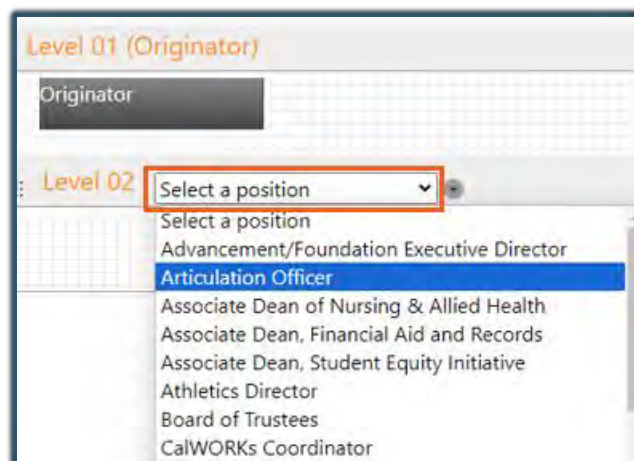


Figure 11.2-4

8. ↗ Click the '+' button beside the Select a Position drop-down to add it to the Design Surface.
9. After clicking the '+' sign, the Step Properties window will automatically open.  
↗ Click [here](#) to navigate to the Step Properties instructions.
10. ↗ Add as many Positions to the Design Surface per Level as needed.
11. ↗ Click the gray space for each Level to fill out the Level Properties.  
Clicking on the Level makes that Level Active so you can proceed to Add Properties.

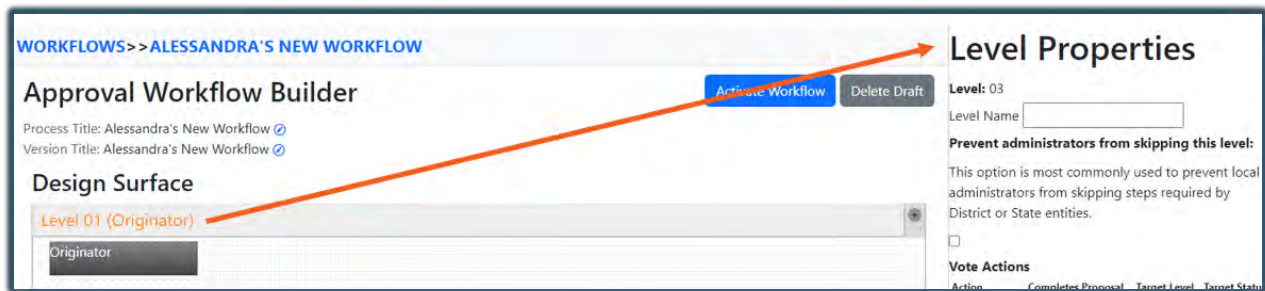


Figure 11.2-5

- **Level Name** – Use this at your convenience to customize the Name of your Level.
- **Prevent Administrators From Skipping This Level** – It is possible for Admins to skip Levels when taking a Proposal through a Workflow. When constructing the Workflow, there is an optional checkbox on each level that, when checked, will prevent Admins from being able to skip that particular Level if it is required by the district or state entities.
- **Vote Actions** – Vote Actions require a Target Level, or if the Action Completes the Proposal, a Target Status. The Target Level drop-down can be set to any Level in the Workflow, or Next Level can be selected to push the proposal to whichever Level in the Workflow that comes after the current Level.
- **Request Change Actions** – Request Change Actions returns the Proposal to the Originator (Level 01), and then typically returns it to the User who requested the change. However, if the proposal should return to another User, a different Level may be selected.

12. ↗ Click on each added Position which makes the Position Active and fill out the Step Properties for the respective Active Position.

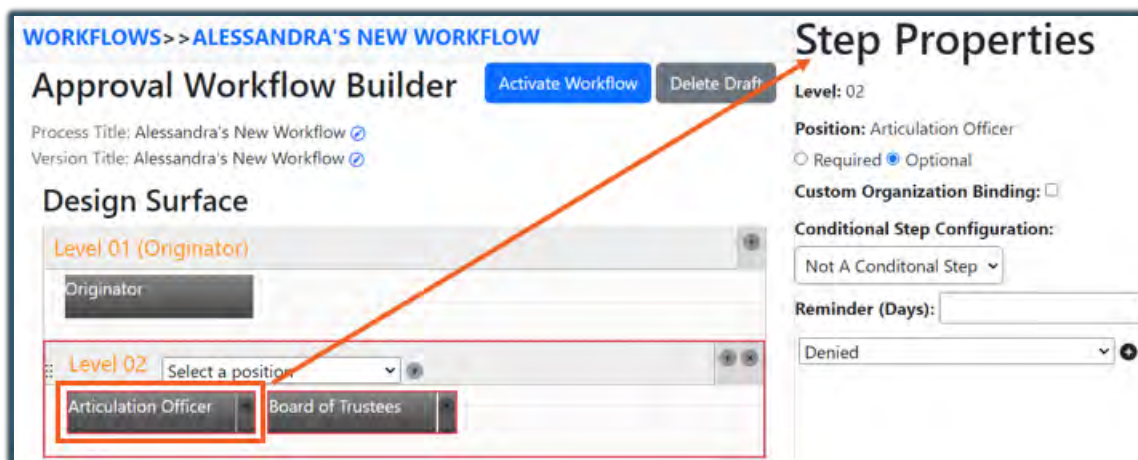


Figure 11.2-7

- **Position** – This is what you have selected within the Level of the Workflow.
- **Custom Organization Binding** – If the Custom Organization Binding checkbox is ticked, specify the binding in the [Proposal Type](#) created using this Workflow.
- **Conditional Step Configuration** – By default, this will be set to Not a Conditional Step. However, some Workflows may allow a Conditional Step because of creating binding selections within the Form. It allows you to alter the Workflow as far as the participants at the time you use the Workflow.
- **Reminder Days** – Once a task enters the Workflow for a Position, the person assigned a Position will automatically receive an email notifying them. If you enter a response for Reminder Days, the Position will get a second notification which is this option, the entered number of days indicated if no Action has yet taken place. This is independent of the Actions outlined in the next set of bullet points.
- **Actions** – Click the '+' button to bring up additional options.
  - **Approve**
  - **Denied**
  - **Hold for Changes**
  - **Approve**
  - **Approved for User Implementation**
  - **Dean Not Supported**

**Information:**

Custom Actions can also be created. You'll learn about this later in the User Guide, but to navigate right to that section, click [here](#).

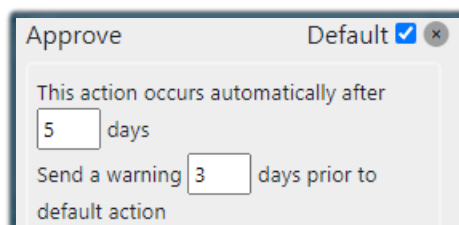
Below each Action you have added you have the option to add a Default behavior by ticking the box to the right of Default. Enter the number of days before the system should send a

Reminder Notification via email to the User(s) assigned this Position preceding to a Default automatic Action occurring. You can also select to send a warning email prior to the default action taking place. If the User or Admin needs to be reminded of additional items, they will all be included with one single email. For example, if the Division Dean had 10 different Proposals they needed to take Action on, they would receive a single email every designated number days until each Proposal is addressed.

## **Information:**

*Default Actions are single select, meaning you can only have one Action selected at a time. For example, I cannot tick Actions for Denied and Approved. If Denied was ticked first, it will be deselected with Approved is ticked.*

Here's an example of how reminders work. I have ticked the checkmark next to Default for Approve. I entered 5 for This Action occurs automatically after X days if no Action has already taken place by the Position selected in the Workflow. As a result, the Action selected will occur automatically after 5 days. I entered 3 days for Send a warning X days prior to default Action. As a result, the User will be reminded every 3 business days, not including weekends and [Holidays](#), until an Action has been taken on the Workflow. If a weekend or Holiday falls into the warning period, the reminder will be said after the weekend or Holiday had occurred.



Approve Default  ✕

This action occurs automatically after  
5 days

Send a warning 3 days prior to  
default action

Figure 11.2-8

## **Information:**

- *If any of the boxes are set to 0, no Action will be taken.*
- *The Holiday schedule is based on what you have entered via the [Holiday](#) page under System Configuration. Weekends follow the traditional calendar. So, suppose there is a 3 day warning period starting on a Friday and Monday is a Holiday in the system. The warning will go out on Wednesday, as that is 3 days from Friday excluding Holidays and Saturday and Sunday.*

13. ↗ To add additional Levels, simply click the '+' button on the right-hand side of the screen.

**Use case:**

*Suppose the Curriculum Chair is on vacation for 2 weeks. It could be helpful to send him or her a reminder notification regarding specific Actions needed upon return.*

14. ↗ Once you have added all the Levels of the Workflow including the Approval Action in the final step click the blue Activate Workflow button located below Create New Proposal on the upper right portion of the screen.

**Information:**

- *If you click Activate Workflow and there is an error within a Level, the entire Level will appear with a red border around it. You will not be able to Activate Workflow until all errors have been corrected.*
- *All Workflows must have at least 2 Levels which include Originator at Level 01, and an Approver at the final Level.*

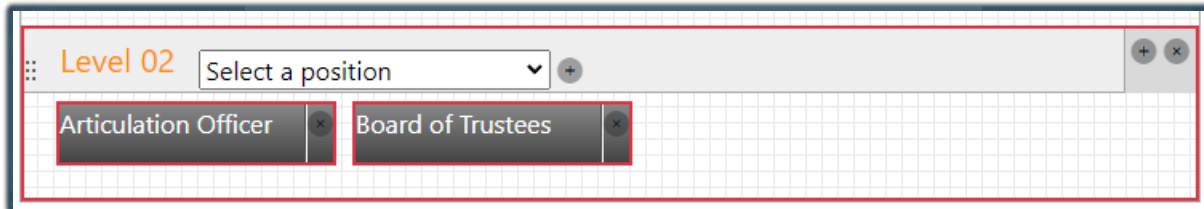


Figure 11.2-9

15. ↗ Click the blue Activate button.

Once Activated, the Workflow will appear under History on the Approval Workflow page and also on the main Workflows page.

**Information:**

*Workflows auto-saves everything. If you time-out or leave a Workflow unfinished, don't worry, the system will automatically save what you have done to a Draft Workflow.*

### 11.3 Copying a Workflow

Instead of Creating an entire Workflow from scratch, you may find it beneficial to Copy a previously Created Workflow and then make the appropriate Edits to it.

To Copy an existent Workflow, follow these steps:

1. ↗ Once on the Approval Workflow screen, click the Copy to Draft icon located to the left of the Saved Workflow you'd like to copy.



Figure 11.3-1

2. The Create Copy window will now pop-up.
  - ☰ Name the new Workflow.

**📘 Information:**

*There aren't limitations to the length of the Workflow Title or special characters. Make the Title as custom as you'd like.*

3. ↗ Click the blue Create Copy button to open the newly copied Workflow.
4. You are now on the Approval Workflow Builder.
  - ☰ Edit the Process Title if Desired by clicking the Edit icon per Figure 11.3-2.
5. ☰ If desired, Edit the Version Title. This is what you just entered as the Title in step 2 on the Create Copy screen.

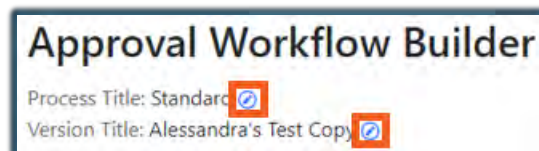


Figure 11.3-2

## 11.4 Editing a Workflow 🧑🏻

Here is a snapshot of an already created Workflow in Edit mode on the Approval Workflow Builder.

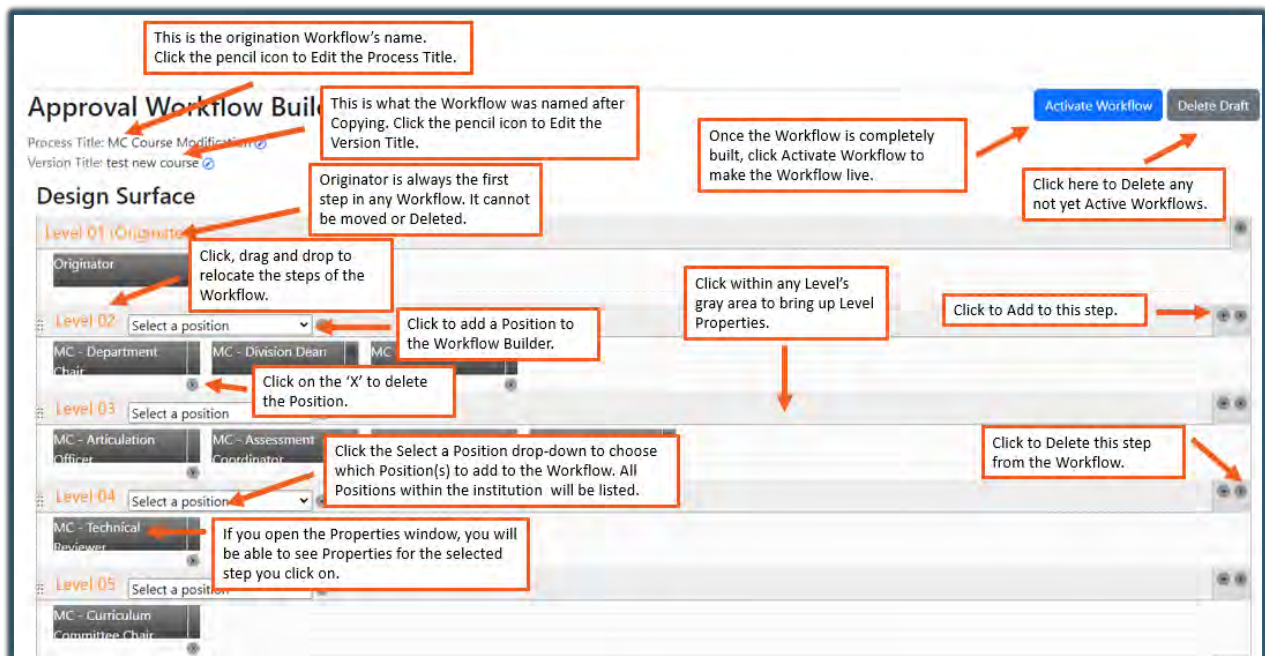


Figure 11.4-1

Here are the steps to Editing an existing Workflow:

1. ↗ Once on the Approval Workflow screen, click the Edit icon located to the left of the Saved Workflow you'd like to make revisions to.
2. You will now be routed to the Approval Workflow Builder page.
  - ↗ 🗒 Edit the Process Title if Desired by clicking the Edit icon per Figure 11.4-2.
3. 🗒 If needed, Edit the Version Title.

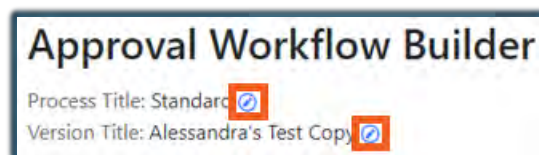


Figure 11.4-2

4. ↗ To add Positions, select the Position from the drop-down menu to the right of each Level.

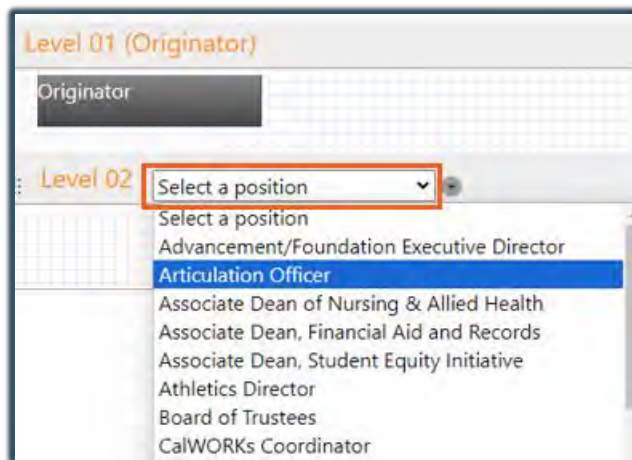


Figure 11.4-3

5. ↗ Click the '+' button beside the Select a Position drop-down to add it to the Design Surface.
6. ↗ Feel free to relocate Levels as necessary by clicking, dragging, and dropping Levels to a new location.



Figure 11.4-4

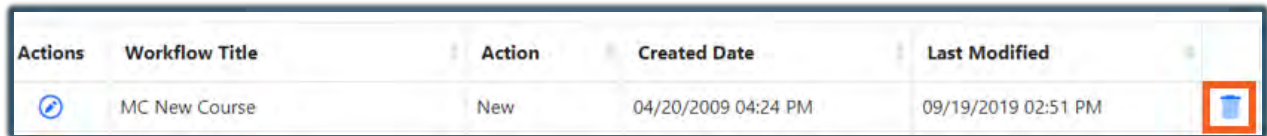
**Information:**

- You cannot reposition the Originator (Level 01) step.
- You cannot Delete any Levels or Positions in an existing Workflow. Instead, Create a Workflow Modification.

7. ↗ Add as many positions to the Design Surface per Level as needed.
8. ↗ Click on each added Position and fill out or Edit the Properties for each Position.
9. ↗ Once you made all the relevant Edits, click the blue Activate Workflow button located below Create New Proposal on the upper right portion of the screen.

## 11.5 Deactivating a Workflow

You can Deactivate any active Workflows by simply clicking the trash can icon located at the left of the Workflow on the main Workflows page.





Actions	Workflow Title	Action	Created Date	Last Modified	
	MC New Course	New	04/20/2009 04:24 PM	09/19/2019 02:51 PM	

Figure 11.5-1

### **Information:**

*Only Inactive Workflows can be Deactivated.*

## 12 Proposal Types

Create New Proposal Types and View existing Proposal Types with this option. This option is potentially located in different places based on your account set-up. It can either be located within the System Configuration, or within the main Search functionality.

### 12.1 From the Main Search Functionality

Within the main Search functionality, one of the available Search options is Proposal Type. Clicking on Proposal Type will bring up a menu of all the Proposals that exist in your account. From this menu, you can tick Proposals you would like to Filter by in your Search.



Figure 12.1-1

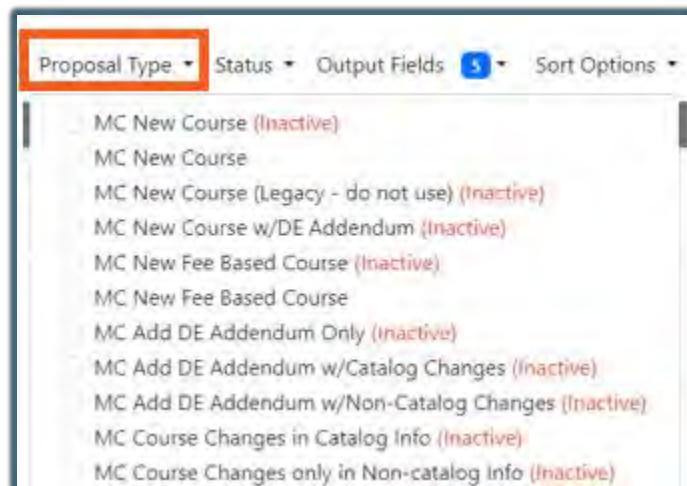


Figure 12.1-2

Like all the other Filter options, once you tick options within their respective drop-down menu, the number of options ticked will be displayed to the right of their Filter name. In the example below, 3 options were ticked, so the number 3 displays to the right of Proposal Type.

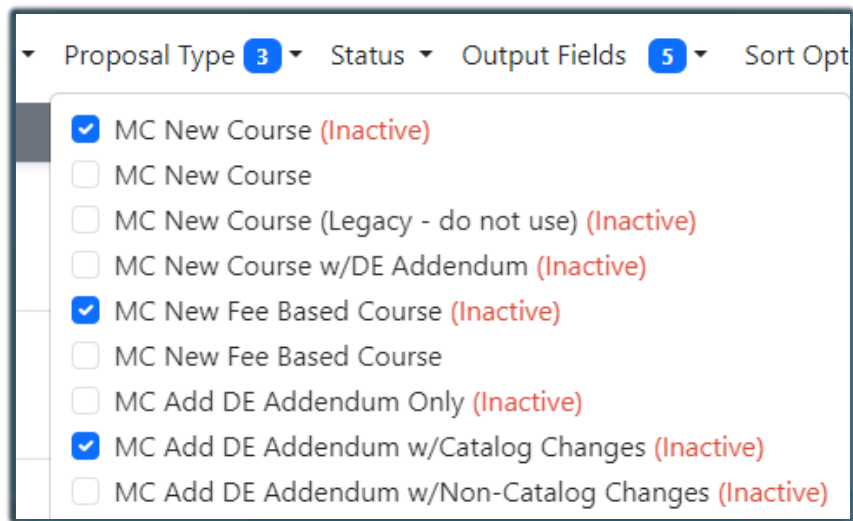


Figure 12.1-3

## 12.2 From System Configuration

You can also find the Proposal Types option via System Configuration.

Once on this page you can Create New Proposal Type, Edit Proposal Types, Deactivate Proposal Types, View Proposal Types, etc.

**PROPOSAL TYPES**

Create New ProposalType

Search

Actions	Title	Instructions	Type	Action	Workflow	Proposal Form
	MC Course Deactivation	Not Set	Course	Deactivate	MC Course Deactivation	Merrit Deactivate Course
	MC Course Modification	Not Set	Course	Modify	MC Course Modification	Merrit Modify Course
	MC New Course	Not Set	Course	New	MC New Course	Merrit New Course
	MC New Fee Based Course	Not Set	Course	New	MC New Fee Based Course	Merrit Fee Based Course
	Test Proposal Type	Not Set	Course	Modify	MC Course Modification	Modify Course
	MC New Program	Not Set	Program	New	MC New Program	New Program
	MC Program Deactivation	Not Set	Program	Deactivate	MC Program Deactivation	Deactivate Program
	MC Program Modification	Not Set	Program	Modify	MC Program Modification	Modify Program
	Syllabus	Not Set	Course	New	Syllabus	Course Syllabus
	MC Assessment 0 - Non-Instructional Unit Outcome	Not Set	Module	New	MC Assessment 0	Assessment - Non-Instructional Unit Outcome

Showing 1 to 10 of 22 rows. 10 rows per page

1 2 3

Figure 12.2-1

### 12.2.1 Create New Proposal Type

Here are the steps to Create a New Proposal Type from the Proposal Types page:

1. ↗ Within System Configuration, click on Proposal Types.

2. ↗ Then click the Create New Proposal Type button.
3. The Create New Proposal Type window will pop-up.
  - ↗ Select your institution.
4. 📄 Next, name the new Proposal Type.
5. 📄 Add Proposal Instructions.
6. ↗ Select the Curriculum Type.
7. ↗ Select the Module Type.
8. ↗ Select the Action you'd like the New Proposal Type to execute.
9. ↗ Now, select the Proposal Form this New Proposal Type should be associated with.
10. ↗ Next select the Roles that can Create Proposals with the Proposal Type you are Creating.
  - ↗ You can also select No Restrictions and then a Role will not have to be selected.

**📘 Information:**

*If you want to select multiple Roles:*

- *For Windows Users:*
  - *Hold Ctrl on your keyboard and click each Role.*
- *For Apple Users:*
  - *Hold CMD on your keyboard and click each Role.*

11. ↗ Last, click the Create Proposal Type button.

The New Proposal Type will now appear on the main Proposal Types page.

**📘 Information:**

*Fill out the Create New Proposal Type window components in order from top to bottom, as most preceding fields are required to be addressed prior to being able to make selections in proceeding fields.*

## 13 Lookup Manager

The Lookup Manager contains a list of Proposal Fields that can be Viewed, Managed, and Edited by an Admin User. Admin Users cannot add additional Fields to the Lookup Manager or additional columns to Fields, nor can they Edit the names of Fields or columns. Fields or columns can be added and configured by curriQūnet support upon request.

Navigate to the System Configuration option to navigate to the Lookup Manager. Once on the Lookup Manager page, the only option on the page will be to Select a Lookup from the drop-down menu.

### 13.1 Using Lookup Manager

Once on the Lookup Manager page, the only option on the page will be to Select a Lookup from the drop-down menu. The options are dependent on what items you have chosen to be part of your institution's Lookup. As mentioned in the previous Lookup Manager section, these options are configured by curriQūnet and if these options need to be revised, you will need to contact support.

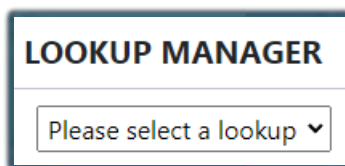


Figure 13.1-1

After an option has been selected, the Lookup will now populate on the screen.

### 13.2 Add New Lookup

**StartDate** – This is the Date the Lookup is created. This Date is automatically populated.

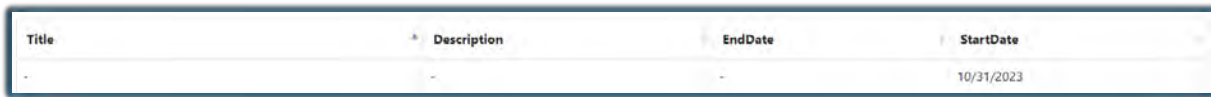
**EndDate** – Assigning a future EndDate will force a Lookup to expire on a denoted Date. If the current Date was denoted, the Lookup will immediately expire and will no longer be available as a Lookup.

You can easily add a New Lookup right from the Lookup Manager page by clicking on the green Add New Lookup button that appears at the top left of the page.

#### **Information:**

*This button will only appear after selecting an option from the drop-down menu.*

The New Lookup will appear with all blank fields with the exception of StartDate, which is the current date and automatically populated.



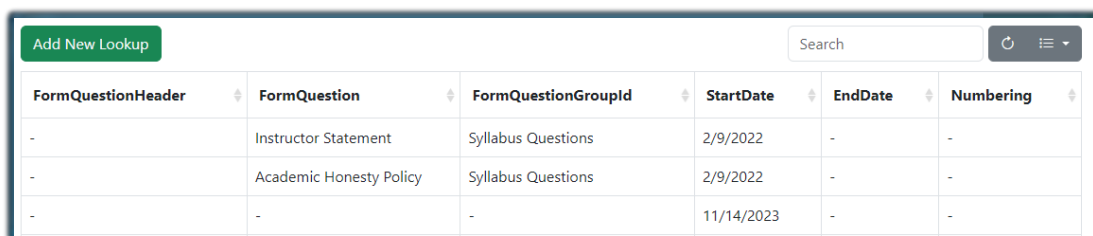
Title	Description	EndDate	StartDate
-	-	-	10/31/2023

Figure 13.2-1

### 13.3 Edit Lookup


Here are the steps to Edit a Lookup:

1. ↗ To Edit the New Lookup, double click anywhere in the blank Lookup line that populated after clicking the Add New Lookup button.



FormQuestionHeader	FormQuestion	FormQuestionGroupid	StartDate	EndDate	Numbering
-	Instructor Statement	Syllabus Questions	2/9/2022	-	-
-	Academic Honesty Policy	Syllabus Questions	2/9/2022	-	-
-	-	-	11/14/2023	-	-


Figure 13.3-1

2. The Edit Lookup window will pop-up.  
 Fill out the relevant Fields.
3. ↗ Once done, click the Save button.

A placeholder Proposal has now been created with the specified information you have entered.

### 13.4 Lookup Search

As you already learned, anywhere you see the Search field, you can conduct a Search from wherever you are on the site.



Search	Refresh	Dropdown
EndDate	Numbering	

Figure 13.4-1

Type part of the content, or the entire content you are looking for into the Search box, and results will retroactively populate.

# curriQūnet | meta

FormQuestionHeader	FormQuestion	FormQuestionGroupId	StartDate	EndDate	Numbering
-	Academic Honesty Policy	Syllabus Questions	2/9/2022	-	-

Figure 13.4-2

## 14 Organization

Admins can access Organization from the System Configuration menu.

Once you land on this page, you will see a list of current Divisions within the hierarchy at your institution. Each tab represents a tier in your institution's hierarchy. The Organization Management tool allows you to [View](#), [Add](#), [Edit](#), [Delete](#), and [Search](#) items in your institution's hierarchy, such as Subjects, Departments, Divisions, or any other custom items. An example of a hierarchy would be Division, Department, Subject. Throughout this section of the User Guide, we will be using the three tier Division, Department, Subject example. However, it is important to note that each institution's hierarchy is unique. For example, your institution may have four tiers and perhaps your institution refers to Division as College.

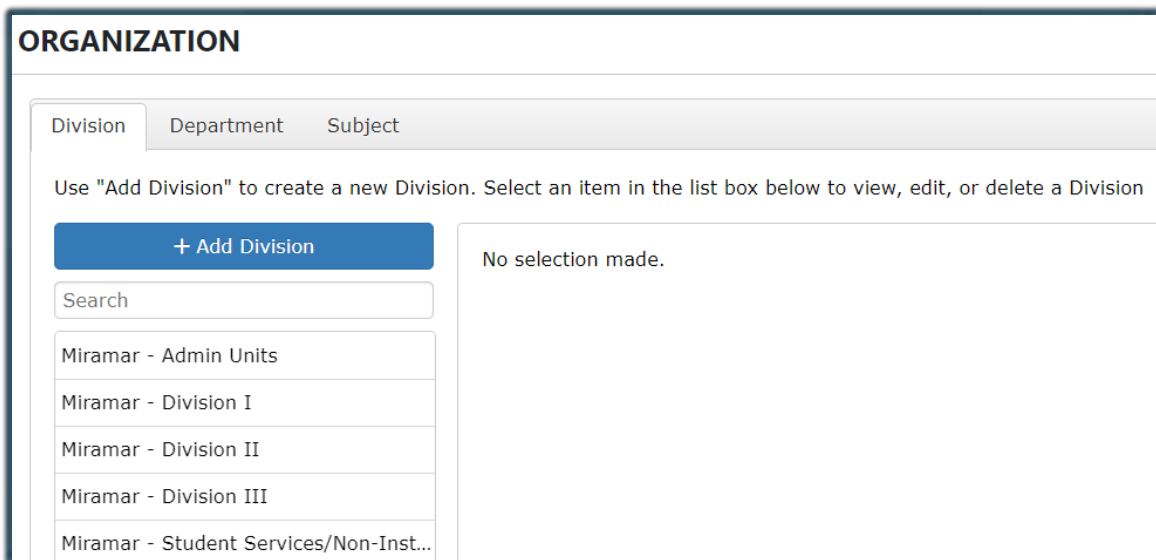


Figure 14-1

### **Information:**

*The above example shows three levels of the hierarchy. Your institution's Organization page may have different items within the hierarchy, the naming convention may be different, and may have the same, additional, or fewer tabs than the example above.*

### 14.1 View Item(s) within Hierarchy

Once you have navigated to any tab, you will be able to View options within that hierarchy. For example, clicking on the Department tab, you will see all the items that exist within that section of the hierarchy.

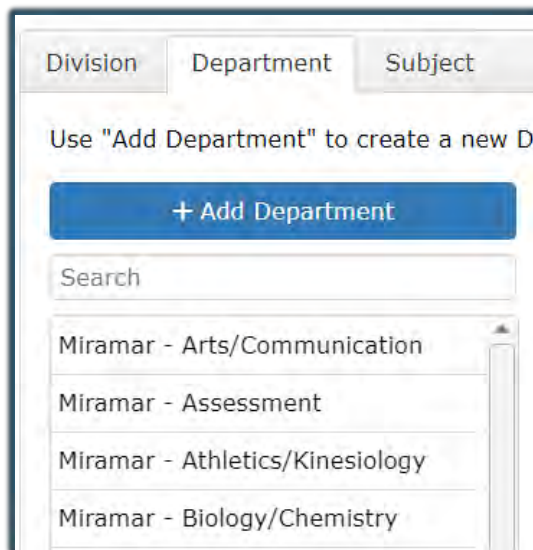


Figure 14.1-1

Furthermore, if you click on any of the individual items, it will bring up their respective Properties that were entered when creating the new item.

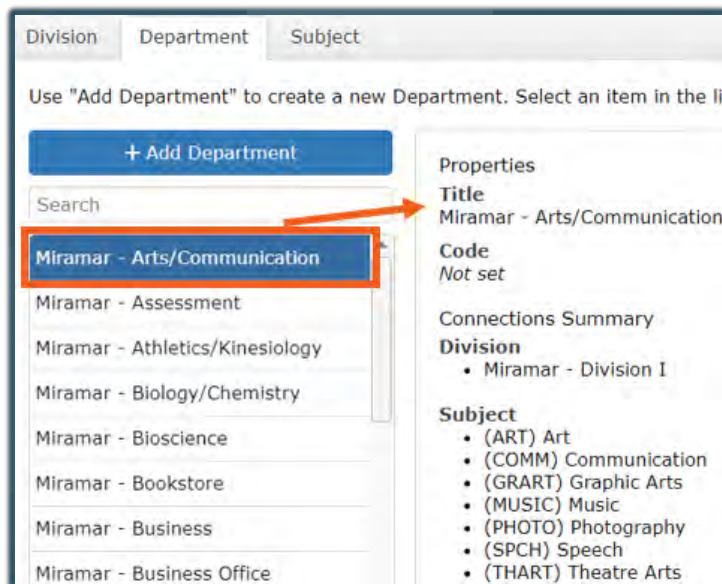


Figure 14.1-2

## 14.2 Add Item(s) to Hierarchy

Follow these steps to Add items to your institution's hierarchy:

1. ↗ To Add an item to the hierarchy, click the blue Add button in the appropriate tab per example below.

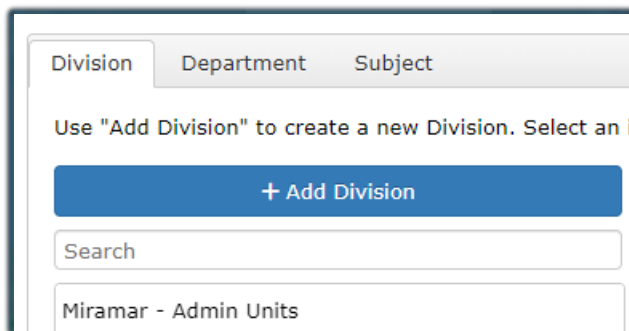


Figure 14.2-1

2. You will now be on the Create screen where you will define the item Properties. Give the new hierarchy item a Title.

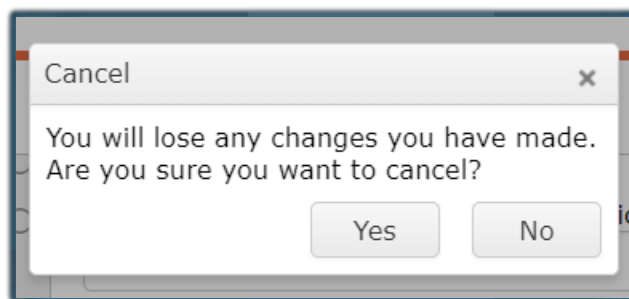


Figure 14.2-2

3. Type in the Code that defines the new item.

**Information:**

- The Code can consist of +letters, numbers, or a combination of both. The Code is not required.
- Once the Properties have been entered, a checkmark will appear to the right of the text Properties, which is step 1 of the Create process. Likewise, a checkmark will appear beside the Connections and Review steps as those steps are completed.

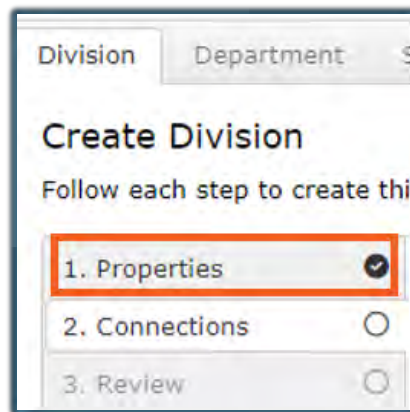


Figure 14.2-3

4. ↗ Click the Next button.
5. You are now in the Connections step.
  - ↗ Now, select what to Connections to make, if any at all. If you would like to undo the selections, simply click the Revery button.

**Information:**

*As you learned earlier in this User Guide, clicking on arrows beside the Title will provide you with more information. In this case, the Properties and if needed, any reasoning as to why a Connection cannot be made will be displayed.*



Figure 14.2-4

6. ↗ If needed, you can also Filter the Connections.

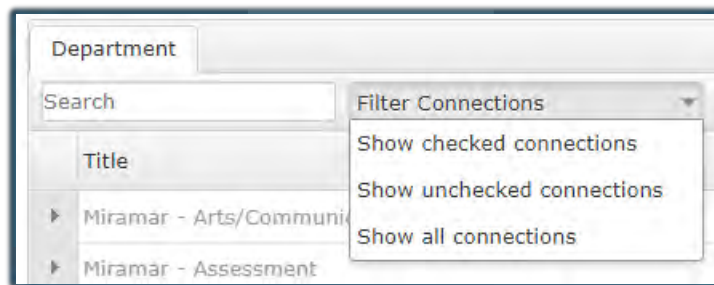


Figure 14.2-5

7. ↗ Click the Next button.

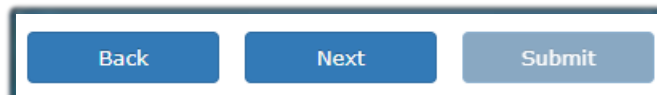


Figure 14.2-6

8. The Connections Impact Report window will now pop-up. This Report outlines the Impact based on the Connections you have made. If Connections weren't made, each line item in the Impact Report will return the outcome of 'None'.  
↗ Click the Accept button once Impacts have been acknowledged.
9. You are now in the Review step of the Create process. A summary of the Created hierarchy item will now be displayed on the screen.  
↗ If any adjustments need to be made, click on their respective step to revise as needed.

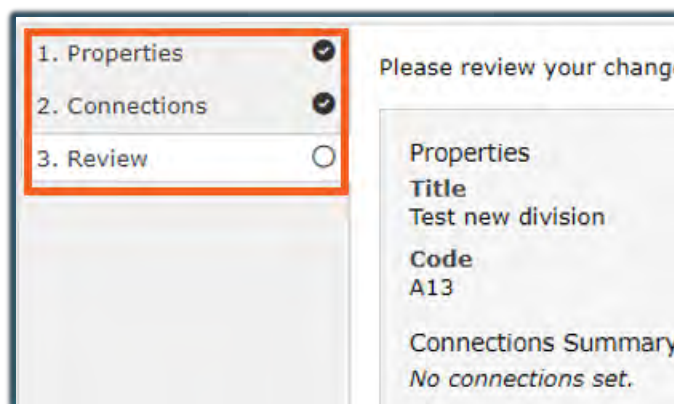


Figure 14.2-7

10. ↗ Once everything entered in the Create process has been confirmed as correct, click the Submit button to Create the new hierarchy item.

The new item will exist on the list of existing items.

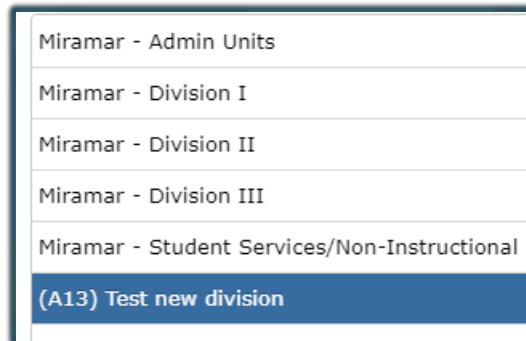



Figure 14.2-8

### 14.3 Edit Item(s) within Hierarchy

To Edit any items within any tab of Organization, follow these quick steps:

1. ↗ In any tab within Organization, click on any of the items followed by the Edit blue Edit button located at the bottom of the screen.
2. ↗  Now, proceed to make any revisions just like you did during the Create process.

### 14.4 Delete Item(s) within Hierarchy

To Delete any items within any tab of Organization, follow these quick steps:

1. ↗ Click on an item you would like to delete.
2. ↗ Click the gray Delete button.
3. ↗ After you confirm you indeed want to move forward with the Deletion, click the Continue button.
4. Confirm again that the item should be Deleted. Note that this Deletion cannot be undone.  
↗ Click the Yes button. The item has now been removed from the hierarchy.

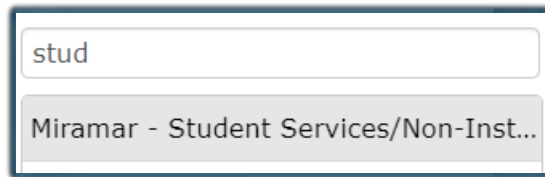
### **Information:**

*One item can be Deleted at a time.*

### 14.5 Organization Search

Searches can be conducted in the same way within any of the Organization tabs. Simply type part of or the entire word or term into the Search box and results will retroactively begin to populate for that term.

# curriQūnet | meta



stud

Miramar - Student Services/Non-Inst...

*Figure 14.5-1*

## 15 Cross Listings 🧑🏻

Find Cross Listings via System Configuration. A Cross Listing is a Course that is identical to another Course located somewhere else at the institution.

### Use case:

*For example, History of Music may be a parent Course in the Music sector, but may be a child in the History division of the institution. These Courses are identical even though in different departments.*

### 15.1 Create New Cross Listing 🧑🏻

Follow these steps to create a Cross Listing:

1. ↗ Once in the Cross Listing option within System Configuration, click on the blue New button.
2. 📄 The New Cross Listing window will appear. Type in the Title and Description of the New Cross Listing.

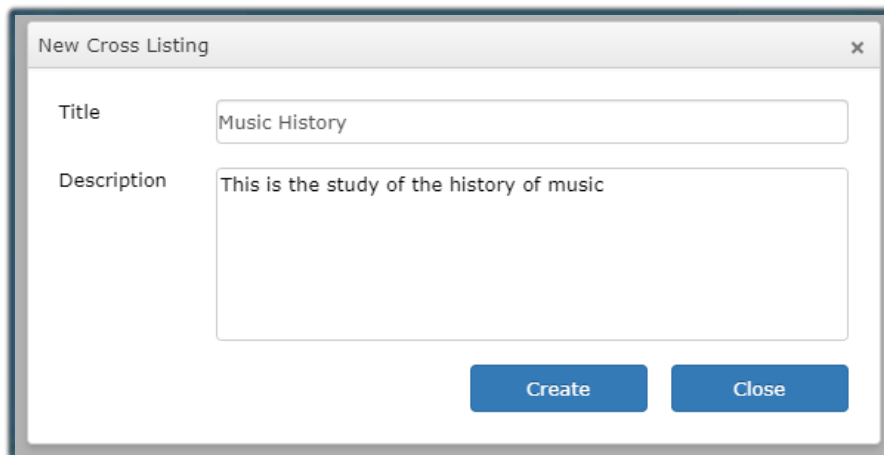
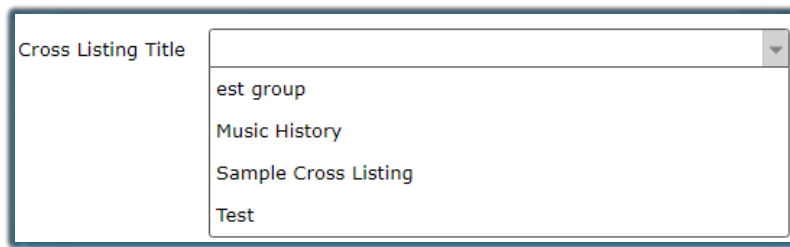


Figure 15.1-1

3. ↗ Now click the blue Create button.
4. ↗ A window will now pop-up indicating the creation of the Cross Listing. Click the Close button.
5. ↗ The Cross Listing Title you just created will now appear on the list of Cross Listing Titles. Select that New Cross Listing.



Cross Listing Title


- est group
- Music History
- Sample Cross Listing
- Test

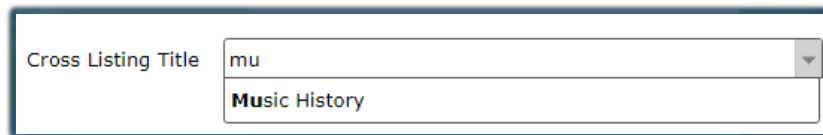
Figure 15.1-2

Now, proceed to following instructions at [Step 2, Manage Existing Cross Listings](#).

## 15.2 Manage Existing Cross Listings

Follow these steps to manage an existing Cross Listing:

1. ↗ Once in the Cross Listing option within System Configuration, click the drop-down menu to the right of the Cross Listing Title text to select the existing Cross Listing.  
 You can also type in any part of the Title into the box and the menu will only populate Titles containing the characters typed.





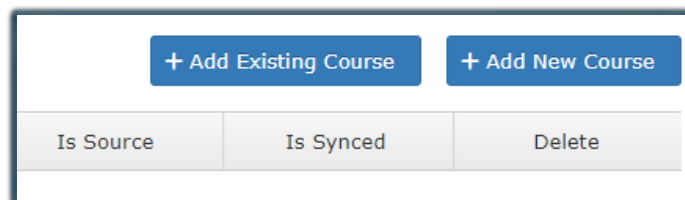
Cross Listing Title

mu

- Music History**

Figure 15.2-1


2. ↗  If you would like to Edit the Title or Description of this Cross Listing, click the Edit button located to the right of the Cross Listing Title.
  - a. ↗  Make your revisions and click the Update button to Save changes.
3. ↗ Next Add Existing Courses and/or New Courses by clicking the by clicking the respective buttons. These would be the parent/child courses.



+ Add Existing Course    + Add New Course

Is Source    Is Synced    Delete

Figure 15.2-2

4. To Add Existing Course, follow these instructions, otherwise skip to Step 5.
  - a. ↗ Click the drop-down menu to the right of Subject to select the existing Subject.  
 You can also type in any part of the Title into the box and the menu will only populate Titles containing the characters typed.

- b. ↗ Click the Add button.
- c. ↗ Click the Close button
- d. ↗ 🗒️ Repeat Step 4 for each Course which should be Added.

**📌 Information:**

*Only Draft, In-Review, Approved, and Active Courses without any pending Proposals can be added*

Figure 15.2-3

5. ↗ If Adding a New Course, continue. Otherwise, skip to step 6.
  - a. ↗ Identify the Source Course by ticking Is Source for that Course. Think of the Source as a parent/child relationship where the Source is the parent, and the other Courses are the children.

Course	Is Sou...	Is Syn...	Delete
BIO 295 - UNDERGRADUATE STEM SEMINAR	<input checked="" type="checkbox"/>	No	X
ANTH 295 - UNDERGRADUATE STEM SEMINAR	<input type="checkbox"/>	No	X
ENGR 295 - UNDERGRADUATE STEM SEMINAR	<input type="checkbox"/>	No	X
MATH 295 - UNDERGRADUATE STEM SEMINAR	<input type="checkbox"/>	No	X
PSCI 295 - UNDERGRADUATE STEM SEMINAR	<input type="checkbox"/>	No	X

Figure 15.2-4

**📌 Information:**

- You can only select one Source.
- This is a mandatory step to Add a New Course.

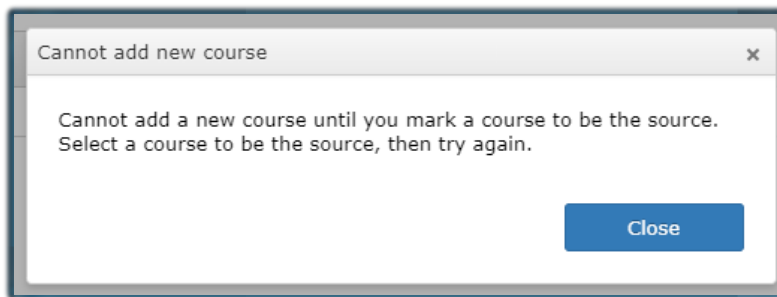




Figure 15.2-5

- b. ↗  Select or type the Proposal Type.  
Your options will be New Course Proposal or New Special Topics Course.
- c. Now you can begin Adding a New Course.  
↗ Click the Add New Course button located at the top right of the screen.

** Information:**

*If you click Add New Course, this will also create a placeholder Course with the information you have entered. So, the Course does not already need to have been Created in order to Add it to a Cross Listing.*

- d. A window will pop-up prompting you for the information of the New Course.  
 Fill out all the information

A screenshot of a form titled "Add New Course" with a close button (X) in the top right corner. The form contains the following fields:

- Instructional text: "Fill out this form to create a draft course proposal. The proposal will automatically be added to the cross listing upon creation."
- Proposal Type: A dropdown menu with "MC New Course" selected.
- Subject: A dropdown menu with "(MUSIC) Music" selected.
- Course Number: A text input field containing "101".
- Title: A text input field containing "History of African American Art (Past to Present)".

At the bottom of the form are two blue buttons: "Add New Course" and "Cancel".

Figure 15.2-6

- e. ↗ Click Add New Course.
- f. A window will now pop-up indicating the Course has been Added.  
↗ Click the Close button.

- ↗ If Synchronization is needed, click Select Proposal Type(s).
- ↗ Select the Proposal types you would like to Synchronize and click the Close button.
- ↗ Click the blue Synchronize button should you want all updates made reflected to all Courses.

For example, suppose I want to make an update to Art 007. I would click Synchronize so that I do not have to make the updates to the other Courses within the Cross Listing. The Synchronization may take several minutes.

- ↗ Click the Close button after the Synchronization has been completed.
- ↗ If needed, you can Delete a Course from the Cross Listing by clicking the X for that respective Course.

### 15.3 Delete a Cross Listing

Follow these steps to Delete a Cross Listing:

- ↗ Once in the Cross Listing option within System Configuration, click the drop-down menu to the right of the Cross Listing Title text to locate the Cross Listing you would like to Delete.  
☰ You can also type in any part of the Title into the box and the menu will only populate Titles containing the characters typed.
- ↗ Click the blue Delete button.

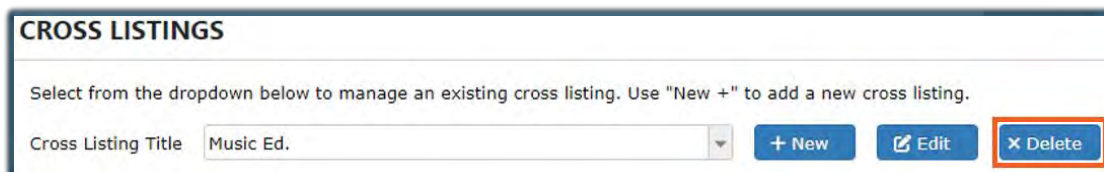


Figure 15.3-1

- You will now be prompted to confirm the Deletion.  
↗ Select Yes to Delete the Cross Listing.

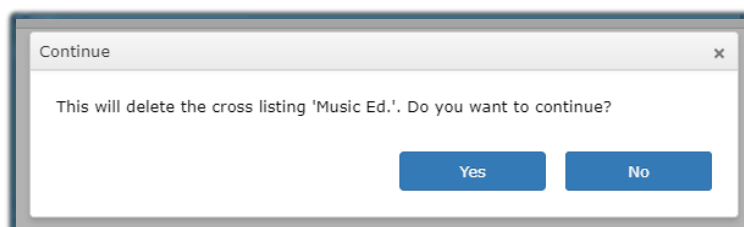
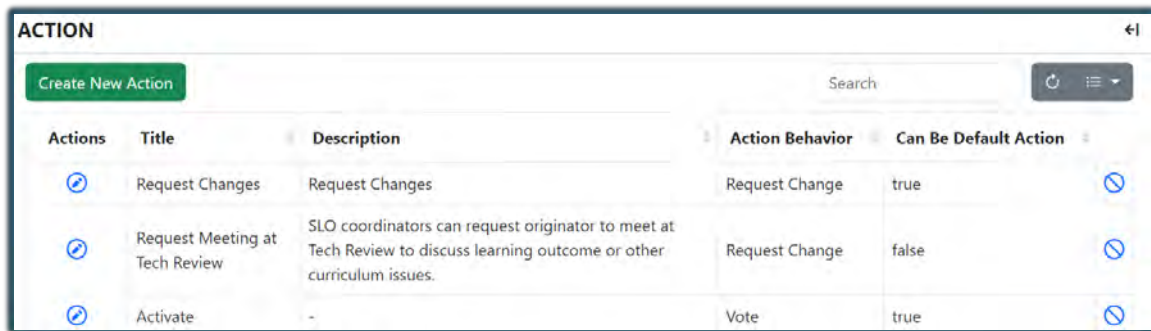


Figure 15.3-2

- A window will display indicating the Cross Listing has been Deleted.  
↗ Click the Close button.

## 16 Action

Navigate to the Action page via System Configuration to View all Workflow Actions as well as Create New Actions.









Actions	Title	Description	Action Behavior	Can Be Default Action
	Request Changes	Request Changes	Request Change	true 
	Request Meeting at Tech Review	SLO coordinators can request originator to meet at Tech Review to discuss learning outcome or other curriculum issues.	Request Change	false 
	Activate	-	Vote	true 


Figure 16-1

### Information:

- You may notice the Not Allowed symbol to the right of some of the Workflows. This is displaying because these Actions are presently in use by a Workflow, and therefore cannot be Deactivated.
- You can make Edits to Actions via the Edit symbol at any time.

### 16.1 Create New Action

Here are the steps to Create a New Action:

1. ↗ Click the green Create New Action button located at the top left of the Action screen via System Configuration.
2. A window will pop-up prompting you to fill out information about the new Action.  
 To start, insert a Title for the New Action. This is required.

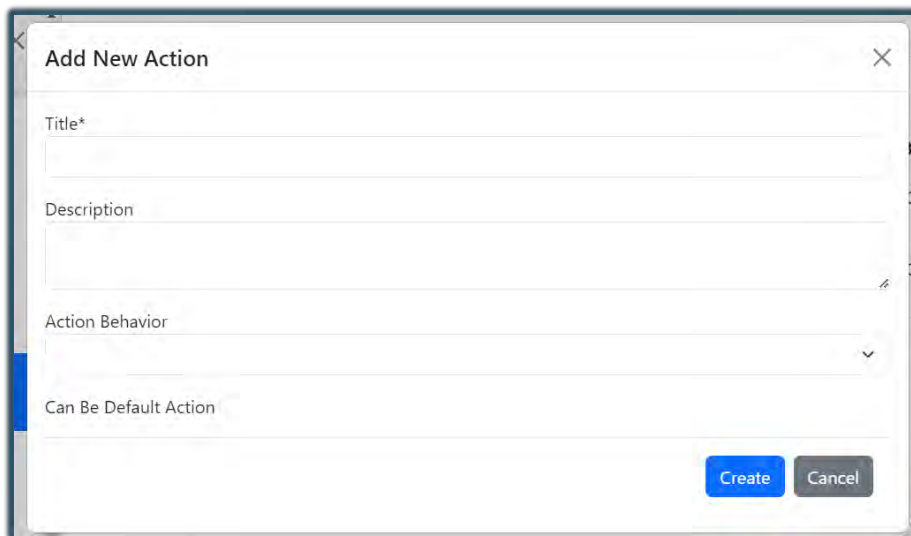






Figure 16.1-1

3.  Next, type the Description of the New Action.
4.  Now, delegate an Action Behavior.  
The choices are [Vote](#) or Request Changes.
5.  Next, tick if the Action can be a Default Behavior.
6.  Last, click the Create button positioned at the bottom of the window.

The New Action will now be added to the main Action page. It will also now appear under the Actions within the Level Properties of Workflows.

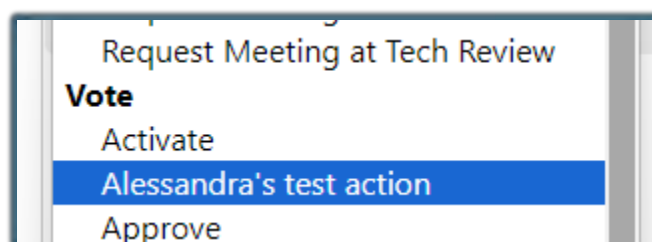
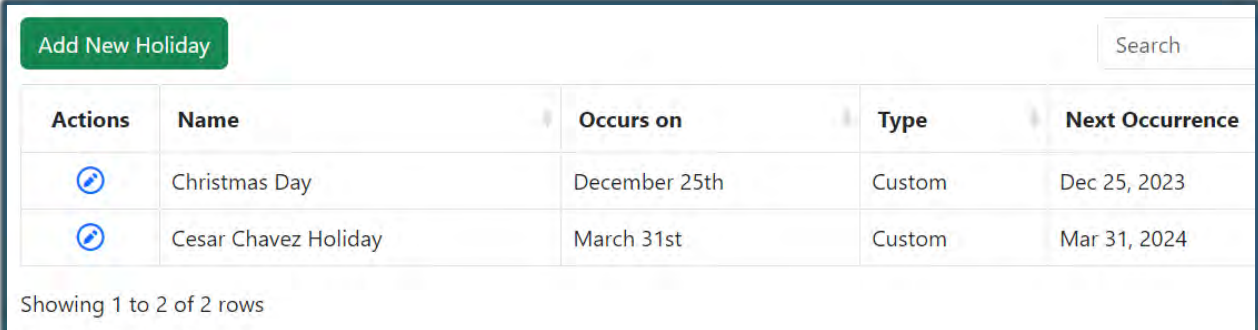




Figure 16.1-2

## 17 Holiday

Navigate to the Holiday page via System Configuration to add national Holidays, state Holidays, and proprietary ones to your institution to the platform. Holidays are essentially any block of time that is automatically skipped within a Workflow, therefore add any of the intuition's custom closed days here.

If there are already Holidays added to your account, you will see them displayed on the page. Otherwise, you can easily [Add New Holidays](#).



Actions	Name	Occurs on	Type	Next Occurrence
	Christmas Day	December 25th	Custom	Dec 25, 2023
	Cesar Chavez Holiday	March 31st	Custom	Mar 31, 2024

Showing 1 to 2 of 2 rows

Figure 17-1

### Use case:

*Suppose your institution acknowledges the day it was established every year and is closed in observation. You can create a Holiday in this instance.*

### 17.1 Add New Holiday

Follow these steps to Add a New Holiday:

1. ↗ First, click on the Add New Holiday button positioned at the top left of the Holiday page.
2. The Add Holiday window will pop-up.
  - ☑ Name the Holiday.

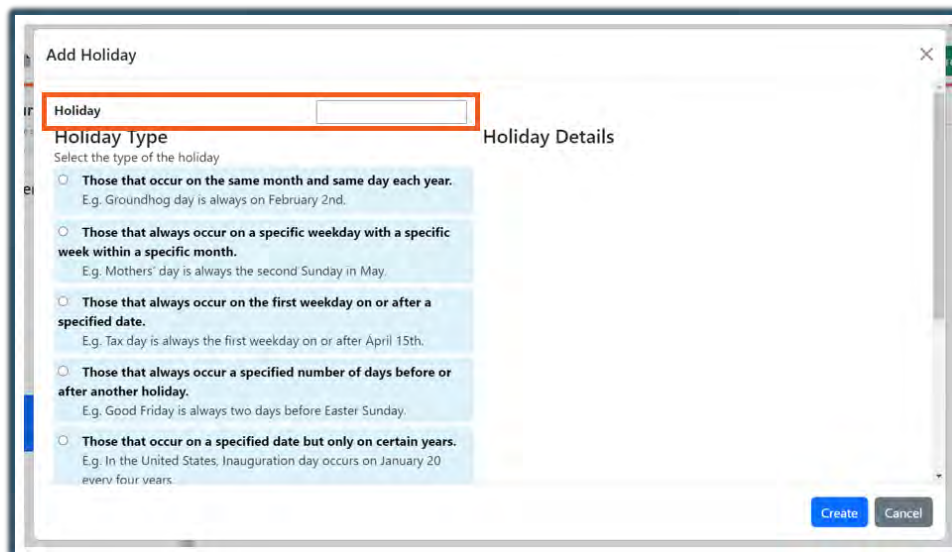


Figure 17.1-1

3. ↗ Select the applicable Holiday Type.
4. Contingent on what you selected for Holiday Type, Holiday Details options will populate.
  - ↗ Select the appropriate information.

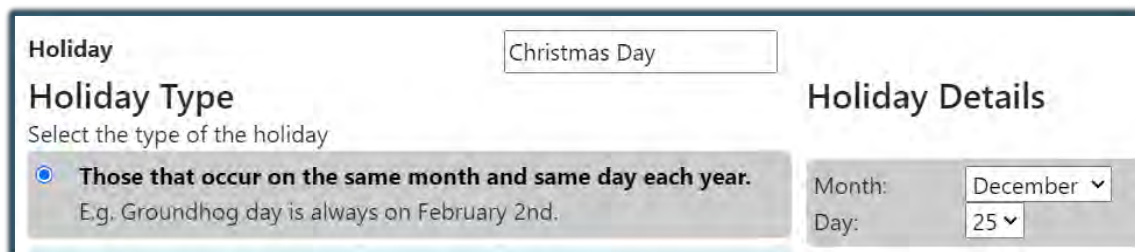


Figure 17.1-2

5. ↗ To finish, click the Create button to save the Holiday to the platform.

Actions	Name	Occurs on	Type	Next Occurrence
	Christmas Day	December 25th	Custom	Dec 25, 2023

Figure 17.1-3

**Information:**

All Holidays must be manually configured. They do not auto-populate into the system like weekends do.

## 18 Reports

Reports can be found in a few different places – Either from Global Navigation, within the Widgets, or within the main Search.

### 18.1 From the Global Navigation

Clicking on Reports will bring up a Reports sub-menu with numerous options. To populate what appears on your institution’s proprietary platform, contact curriQūnet META’s [support team](#) and we will construct this for you. Likewise, access Permissions can be configured per individual Users. Reports here are completely customizable to your institution.

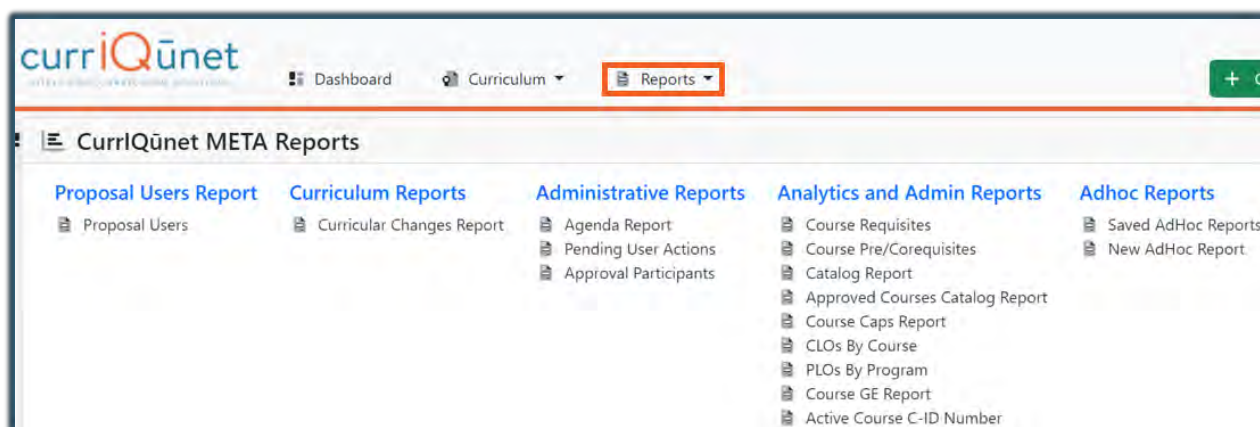


Figure 18.1-1

### **Information:**

*The exact naming conventions and Report types you see in Figure 18.1-1 may not match exactly what you see on your end, as these are customizable.*

### 18.2 From a Widget

Within the My Approvals, My Programs and My Courses Widgets, depending on your settings, there may be a Reports button.

Click the Reports button to display a list of available Reports to View. Once you select a Specific Report, you will be brought to the associated Report’s page.

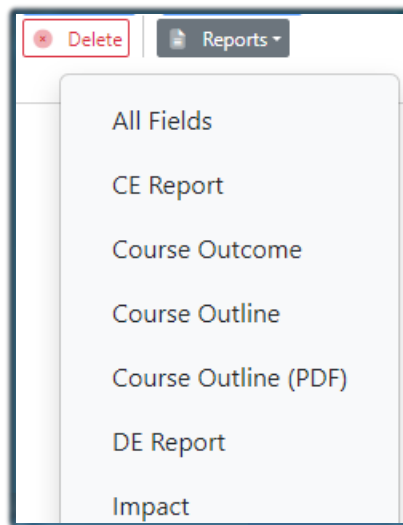


Figure 18.2-1

**Information:**

The Reports available are customizable by curriQūnet via support ticket. As a result, the exact naming conventions you see in Figure 17.2-1 may not match exactly what you see on your end.

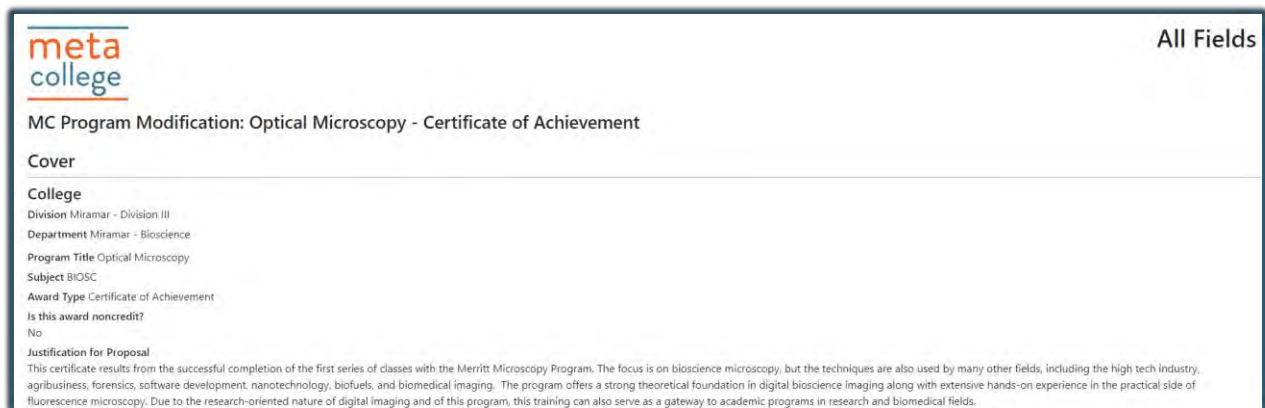


Figure 18.2-2

### 18.3 From Search

When conducting a Search, on the right side of Search results, the Reports button will be displayed.

Full Course Title	ProposalType	Status
ACADEMIC SUPPORT LABORATORY	New Course Proposal	Historical
ARITHMETIC FUNDAMENTALS	New Course Proposal	Historical
ARITHMETIC FUNDAMENTALS	Major Modification Course Proposal	Active
TEST AND PERFORMANCE ANXIETY	New Course Proposal	Historical
GED TEST PREPARATION	New Course Proposal	Active

Figure 18.3-1

Click the Reports button to bring up the menu of Report options available to generate for the respective result.

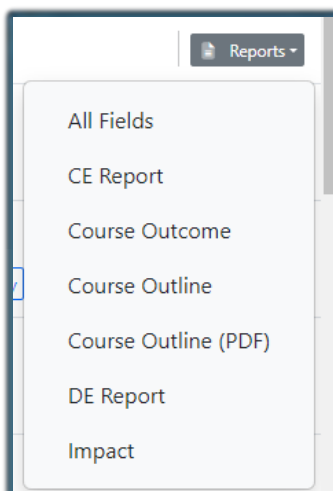


Figure 18.3-2

## 18.4 All Reports

Here is a list of all reports found throughout the curriQūnet meta website as well as a brief explanation of each.

### **Information:**

*Remember, the names of the Reports may not match what you see on your site exactly, as these names are custom to your institution. You also may not see all the Reports on your site that are explained throughout this User Guide*

- **Comparison** – This Report will compare two reports within the same subject family against each other based on Status. The Comparison will be the Report you are within, and another one you select to compare against. For example, comparing one version of a Proposal or Course with another version of the same Program or 8Course. Essentially, you are comparing different Proposals of the same Course side-by-side to determine more easily what has been added or removed from one Course to another. For example, you can compare English 101 in Draft Status to English 100 in Active Status.
- **Abridged Comparison** – This is another type of Comparison Report, except this Report only lists changes and nothing else within different versions of a family of subjects.
- **Agenda Report** – During the curriculum Approval Review Process, there are usually meetings that occur to Approve Courses or Programs. This type of Report will generate an agenda in Microsoft Word for the meeting based on content within a Report using META's proprietary technology.
- **Distance Education Addendum** – This type of Report is proprietary to California Community College institutions and meets state reporting requirements.
- **Outcome Mapping** – This Report displays all the student Outcomes that are part of this Course. Additionally, it will show what other Courses the Outcomes they are mapped to.
- **All Fields** – This Report consists of every Output Field within the Proposal.
- **CE Report** – These Reports can be for either Distance Education, Continuing Education, or non-credit Courses.
- **Course Outcome** – This Report will display all the objectives for a specific Course. Objectives were inserted via Forms when creating the Course.
- **Course Outline** – Also known as a Course Outline of Record, Course Summary, etc., this is the official document which states the Course Title, Number, Description of the Course, Pre-requisites, Co-requisites, etc. Course Outline is one of the most commonly used Reports. Think of this Report as the official Course one-pager.
- **Course Outline (PDF)** – This Report contains identical content as Course Outline, however it is structured in such a way that could be easily exported to a PDF.
- **DE Report** – This is a Distance Education Report, applicable to California institutions only.
- **Impact Report** – This Report will indicate co-requisites or pre-requisites that will affect another Course. In addition, Impact Reports will display what Programs a Course is in. For example, it will show you the Impact that you will have other areas of the curriculum.
- **Program Summary Report** – This Report is the official snapshot of the Program containing itemized program data and configured per the institution's specifications that tends to be used in a variety of internal and external processes, as it includes all relevant/required Program information.

The most common reports are Course Outline, Impact, and All Fields.

## Information:

- Upon clicking *Run Report*, selected Reports throughout the curriQūnet META website will always open in a new browser tab.
- If you wanted to download any of the Reports found throughout the site, simply press *Ctrl P* on a Windows computer, or *Cmd P* on a Mac, and *Save the Report as a PDF*.

### 18.4.1 Comparison Report

As you just learned, Comparison Reports will Compare the selected line item's Report to another selected Historical Report.

To access a Comparison Report, follow these steps:

1. ↗ Click the Reports button.  
A drop-down menu will now appear.
2. ↗ Click Comparison.

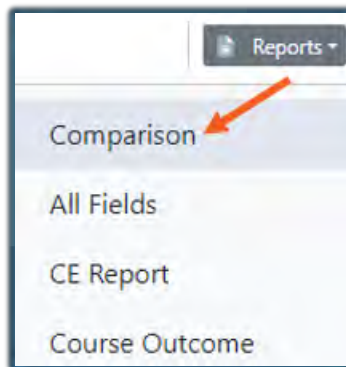


Figure 18.4.1-1

3. The Select Comparison Target window will appear.  
↗ From the drop-down menu, select the Historical Report to run a Comparison against.

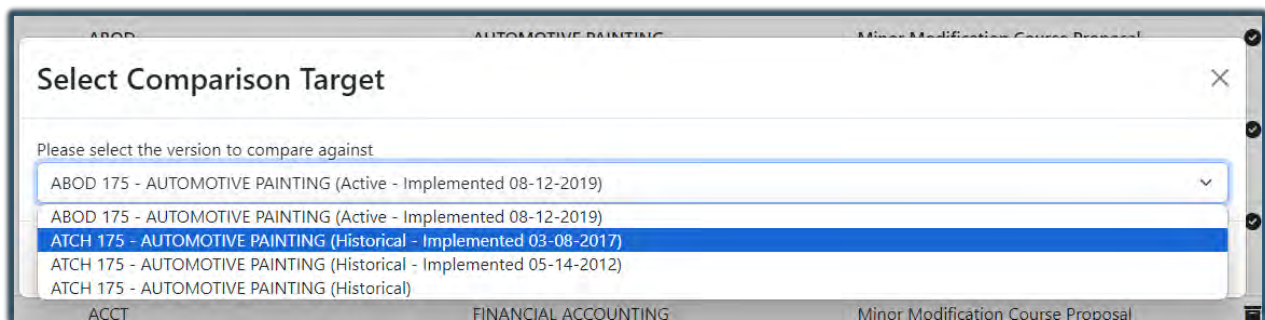


Figure 18.4.1-2

4. ↗ Click the blue Run Report button.

The Reports will now open in a new tab. In the new tab, you will see both Reports side-by-side. The Historical Report you chose to run will be on the left, and the Active will appear on the right. Anything that has been Deleted from the Historical Report Compared to the Active Report will be highlighted in Red. Anything new in the Active Report will be highlighted in green.

ABOD 175 - AUTOMOTIVE PAINTING		Comparison
ABOD 175 - AUTOMOTIVE PAINTING (Active - Implemented 08-12-2019)	ABOD 175 - AUTOMOTIVE PAINTING (Historical - Implemented 08-12-2019)	
Justification Equipment No Justification Staffing No Justification Similar Course No Justification Assignments ARE College Level Yes ESL/Basic Skills Course No Distance Education <b>Yes</b> Correspondence Education No Component of Program 1. Program AUTO BODY TECHNICIAN ( Associate In Science) 2. Program AUTOBODY TECHNICIAN ( Certificate of Achievement )	Facilities No Justification Equipment No Justification Staffing No Justification Similar Course No Justification Assignments ARE College Level Yes ESL/Basic Skills Course No Distance Education <b>No</b> Correspondence Education No Component of Program 1. 2.	

Figure 18.4.1-3

#### Use case:

Suppose you wanted to do a side-by-side Comparison to see what changed from a Course from year 2000 to an Active Course. Running a Comparison Report will help you easily identify any differences between the two Reports.

#### **i** Information:

Though this section specifically provides instructions on Comparison Reports, the instructions are standard for accessing all Reports found throughout the curriQūnet META website.

### 18.4.2 Agenda Report

As you already learned, Agenda Reports can be automatically generated within the curriQūnet META platform.

Follow these steps to compose an Agenda Report:

1. ↗ Navigate to Agenda Report.
2. You will now be on a page which consists of all the Courses that are ready for Approval.  
↗ Now, select the Course(s), if any, which are ready to be Approved.

<input type="checkbox"/>	Item #	Title
<input type="checkbox"/>	-	ADJUS 071 - Intelligence Analysis and Security Management
<input type="checkbox"/>	-	ADJUS 110 - Basic Course–Police Academy
<input type="checkbox"/>	-	AFRAM 200 - Africana Learning Lab
<input checked="" type="checkbox"/>	-	ANTHR 001 - Introduction to Physical Anthropology
<input checked="" type="checkbox"/>	-	ANTHR 002 - Introduction to Archeology and Prehistory

Figure 18.4.2-1

**Information:**

By default, you will be in the Course tab when you land on this page.

3. ↗ Next, click the Program tab.



Figure 18.4.2-2

4. ↗ Select the Program(s), if any, that are ready to be Approved.
5. ↗ Next, click the Package tab.
6. ↗ Select the Package(s), if any, that are ready to be Approved.
7. ↗ Lastly, click the Preview Tab.

The created Agenda Report will appear on this tab.

Course	Program	Package	Preview
meta College			
Agenda Report			
November 29, 2023			
<b>I. Call to Order</b>			
<b>II. Minutes of</b>			
<b>III. Announcements</b>			
<b>IV. Action Items</b>			
<b>V. Consent Calendar</b>			
Agenda Item	Proposal Information		
<u>A. MC Course Modification</u>			
1.	Course Number & Title: <a href="#">Introduction to Physical Anthropology</a> 001 Subject: Anthropology(ANTHR)		
2.	Course Number & Title: <a href="#">Introduction to Archeology and Prehistory</a> 002 Subject: Anthropology(ANTHR)		
<u>B. MC Program Deactivation</u>			
1.	Program Title: <a href="#">Academic Composition Skills</a> Discipline: Miramar - Division I Award Type: Certificate of Competency		

Figure 18.4.2-3

- ↗ To export the Agenda, click the Generate Report button located at the bottom left of the Course, Program, and Package screens.

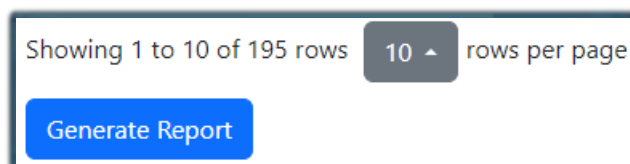


Figure 18.4.2-4

The Generated Report will automatically appear in your computer's downloads folder.

**Use case:**

*Agenda Reports allow Admins, Curriculum Managers, Curriculum Chairs, etc., to easily generate Agendas for Courses, Programs, and other Curriculum items to be used in specific meetings.*

## 19 Main Search Functionality

Throughout this section of the User Guide you will learn about the Search functionality which you will be able to access throughout the curriQūnet website whether you are logged in or not. You will also learn about [Keyword Search](#), [Advanced Filters](#), [Sort Options](#), [Fields](#), [Searching for Reports](#), how to [Save Searches](#), etc.

The first place you will see the Search option is via the Public website, which you learned earlier in the User Guide that you only need your institution's URL to access it, and do not need to be logged in. In this case, the Search button is positioned on the upper right-hand corner of the screen below the Login button.

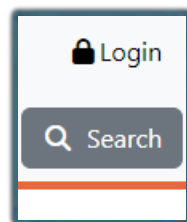


Figure 19-1

The second place you can access the Search functionality is while logged into the Global curriQūnet META website on the upper right-hand side of the screen underneath your Username. The Search button will always be accessible here throughout the curriQūnet META website and can be used to Search various different components of the website. For example, you can Search Workflows, Courses, Users, etc.

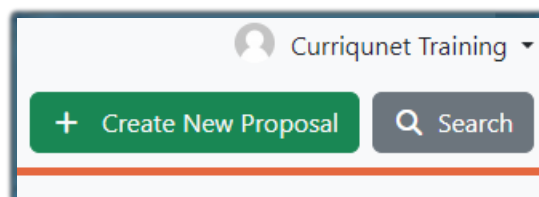


Figure 19-2

Your allotted Permissions will dictate what you can Search for and what you have access to. Note that Public Search versus Global Search features do vary. For a comparison of features in Public Search versus Global Search click [here](#).

# curriQūnet | meta

Here's a snapshot of the Search window to help you better understand this functionality.

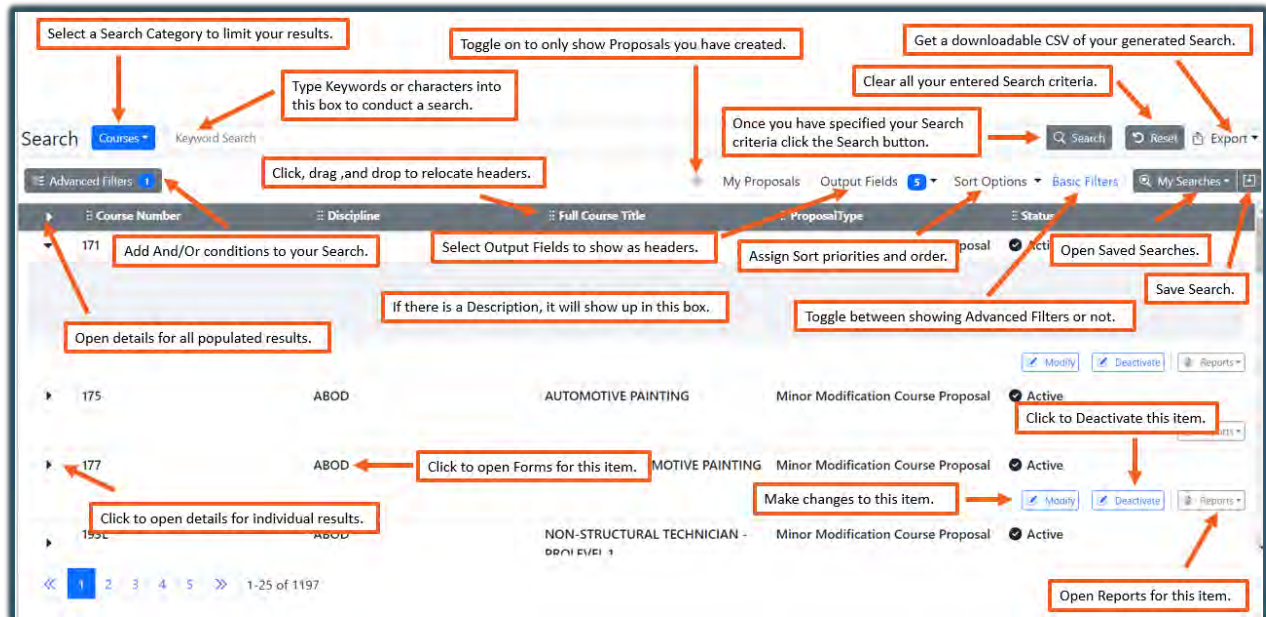


Figure 19-3

## Information:

- Results are populated with Search criteria appearing anywhere within the institution's curriQūnet META website. Therefore, even if you do not see the exact text appear within the Proposal line that populates within the Search, just recognize that the criteria will be contained internally within the Proposal Form.
- You can run Filters and Keyword Searches concurrently.

## 19.1 Categories

Available selectable Categories will vary dependent on your institution's account set-up. See below for example categories.

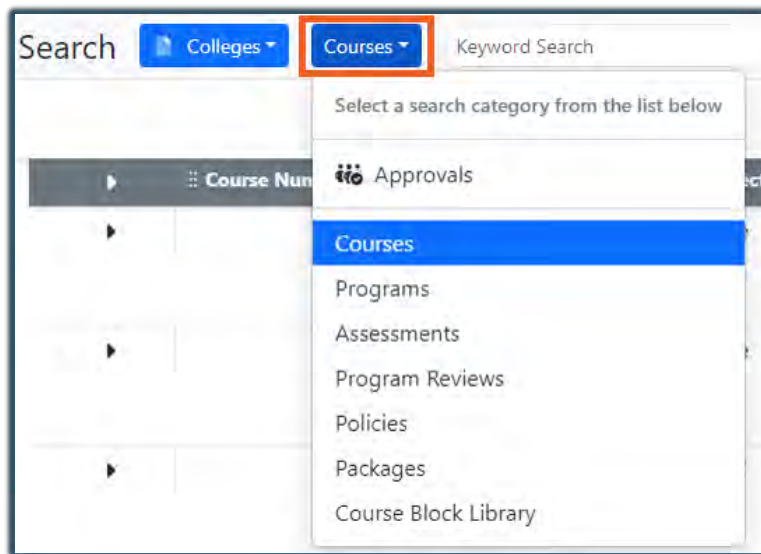


Figure 19.1-1

### 19.1.1 Subcategories

It is possible that some of the Groups or Categories within your account will have Subcategories. In short, Subcategories are types of Filters that can narrow down your Search results by Groups and Categories making it easier to find items within your account and also making it easier to Launch Proposals.

For example, in the Figure below, the Category is Courses and the Subcategories are located in the dropdown to the right of it.

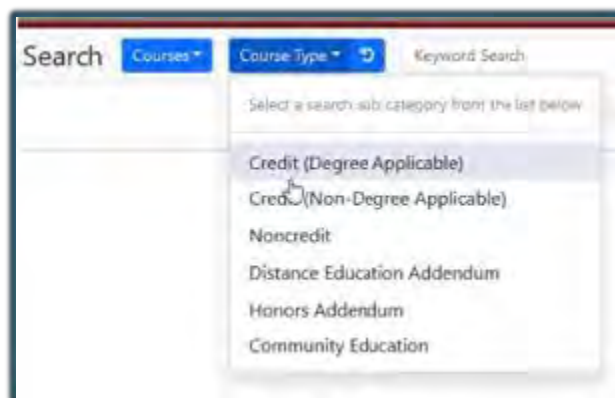


Figure 19.1.1-1

### 19.2 Keyword Search

Type a keyword or character into the Keyword Search box and the Search will populate the relevant results upon clicking either the Search button on the upper right-hand side of the

screen or by hitting the Enter button on your keyboard. The Keyword you entered will populate results with that Keyword appearing anywhere within the entry including Form.

## 19.2.1 Keyword Search Example Explained

In the example below, mathematics was typed in as the Keyword. The results populated all Proposals which contain mathematics whether it be in the Title, Description, Department, Form, etc.

The screenshot shows a search interface with the keyword 'mathematics' entered. The search results are displayed in a table with the following columns: Course Number, Subject, Title, Proposal Type, and Status. There are three results listed:

Course Number	Subject	Title	Proposal Type	Status
105	BIOSC	Introduction to Quantitative Analysis in Bioscience	MC New Course	Active
202	BUS	Business Mathematics	MC New Course (Legacy - do not use)	Historical
202	BUS	Business Mathematics	MC Course Deactivation	Historical

Figure 19.2.1-1

In Figure 19.2.1-2 below, year was entered as a Keyword. In turn, the system is displaying all results which contain the word Year, whether in the Title, Form, etc.

The screenshot shows a search interface with the keyword 'year' entered. The search results are displayed in a table with the following columns: Course Number, Subject, Title, Proposal Type, and Status. There are three results listed:

Course Number	Subject	Title	Proposal Type	Status
027	AFRAM	Afro-Caribbean History, Politics, and Culture	MC New Course (Legacy - do not use)	Historical
027	AFRAM	Afro-Caribbean History, Politics, and Culture	MC Add DE Addendum w/Non-Catalog Changes	Historical
027	AFRAM	Afro-Caribbean History, Politics, and Culture	MC Course Modification	Active

At the bottom of the table, there is a pagination bar showing '1-25 of 62' and navigation arrows.

Figure 19.2.1-2

## Information:

Since Keyword Search will populate data from all places within your institution's curriQūnet META site, this feature could return lengthy Search results as well as become overwhelming to absorb. It may also be helpful to run other Search mechanisms in tandem with Keyword Search, such as Advanced Filters.

### Use case:

An effective way to use Keyword Search is if you know a specific Keyword that exists within a Form or Proposal.

## 19.3 Using Search Advanced Filters

Advanced Filters are beneficial in conducting in depth, complex Searches. You can use Boolean Searches by using AND/OR conditions on your specified criteria. Since these are very advanced Searches, typically solely Administrators, and people of clerical or managerial responsibilities use Advanced Filters. Faculty members would typically not use this aspect of the site.

First off, it's important to understand how to use Filters. Below is a snapshot of the Filters functionality.



Figure 19.3-1

In addition to the explanations in Figure 19.3-1, here is more information on some of the Filter functionalities.

# curriQūnet | meta

- **AND** – This operator essentially acts as a '+' sign. For example, if this AND this, then execute that. You can add an unrestricted amount of AND conditions.
- **OR** – This acts as an either operator. Either this OR that. You can have limitless numbers of OR conditions.
- **Add Rule** – All Added Rules are connected with a single AND or OR operator. The operator cannot be changed on ad hoc Rules. As a result, either all the Rules must be AND conditions, or all the Rules must be OR conditions. There is no maximum to the number of Rules you can have.
- **Add Group** – Groups act as nested conditions. You can change the operator (AND/OR) by Adding a Group. There is no limit to how many Groups you are able to add.

Here's how you use Advanced Filters in a Search:

1. ↗ First, click the Advanced Filters button located on the upper left-hand side of the Search screen.

## 📘 Information:

If you have already activated any Filters, the text Basic Filters will display in place of Advanced Filters.

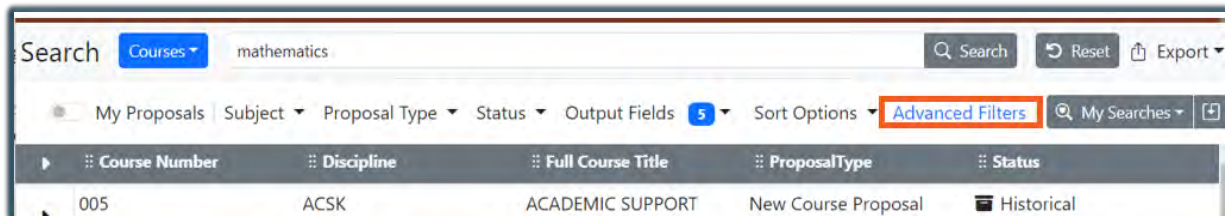


Figure 19.3-2

If you have already activated Advanced Filters, to re-open them, simply click the Advanced Filters option on the right-hand side of the screen.

## 📘 Information:

If a number appears in red, it indicates an error, or an invalid Rule. Otherwise, the 1 would appear in blue.

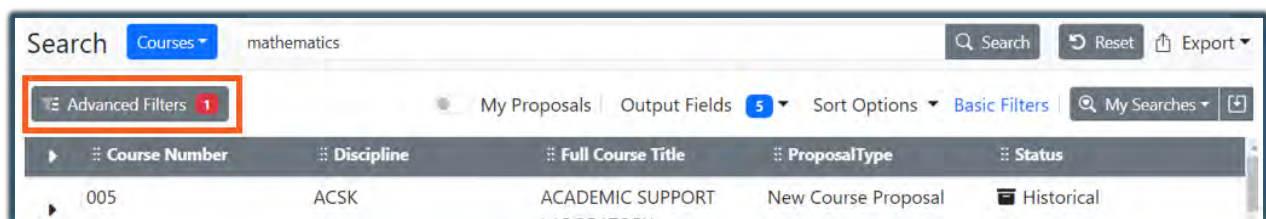


Figure 19.3-3

# curriQūnet | meta

2. A Filters window will pop-up. This is where you can Add Rules and Add Groups.  
↗ Select your first Rule from the drop-down menu.

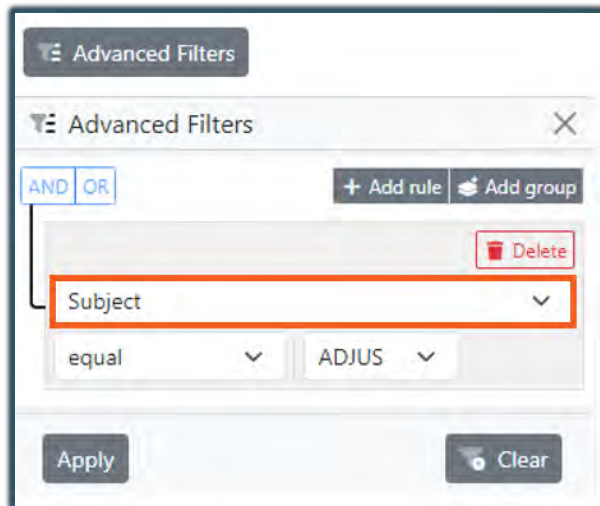


Figure 19.3-4

3. ↗ Select an option from the next drop-down menu.

**Information:**

Depending on the size of your browser window, the view you actually see may vary.

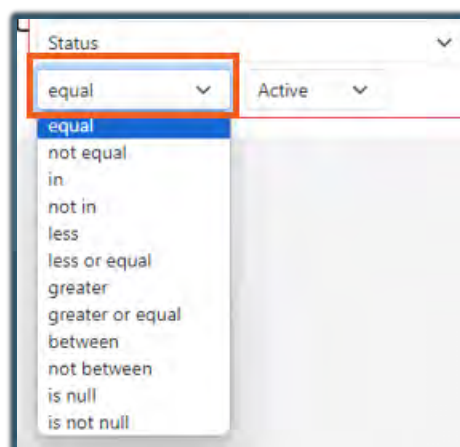
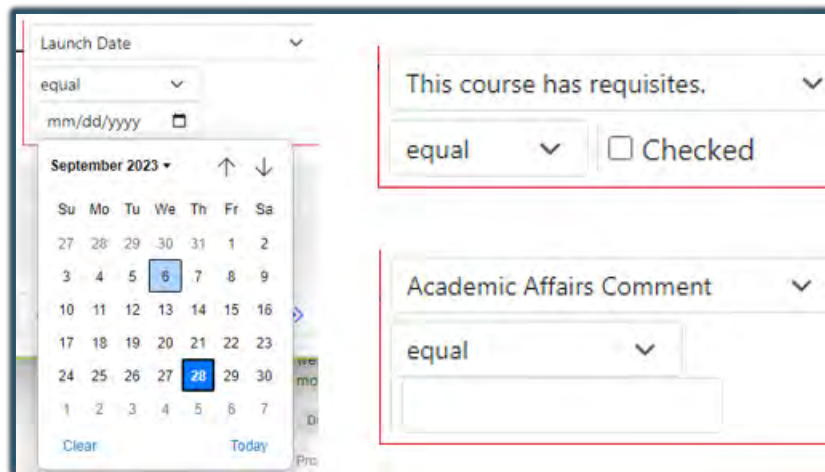


Figure 19.3-5

4. ↗ Now select an option from the third box.  
Options here will vary dependent on what was selected in the initial Rule.
5. ↗ 📄 You will be prompted to select/do one of the following:

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- Select an option from the drop-down menu.
- Select a date on the calendar.
- Checked
- Type in your response.



The screenshot shows a web interface for configuring course rules. On the left, a calendar for September 2023 is displayed with the 6th and 20th highlighted. To the right, there are two configuration sections. The top section is titled 'This course has requisites.' and contains a dropdown menu set to 'equal' and a checkbox labeled 'Checked'. The bottom section is titled 'Academic Affairs Comment' and contains a dropdown menu set to 'equal' and a text input field.

Figure 19.3-6

6. ↗ Add additional Rules and Groups as needed.

**Information:**

- *If you only have one set of Rules, you will not be prompted to select AND/OR.*
- *Remember, you cannot change the AND/OR per Rule. It's either one or the other for all Rules.*
- *At any point, you can Delete Rules and Groups by clicking on the red Delete button.*

7. ↗ Select AND/OR as the condition for your Rules.

8. ↗ Click the Apply button.

9. ↗ Lastly, click the Search button.

The results will now reflect on the page.

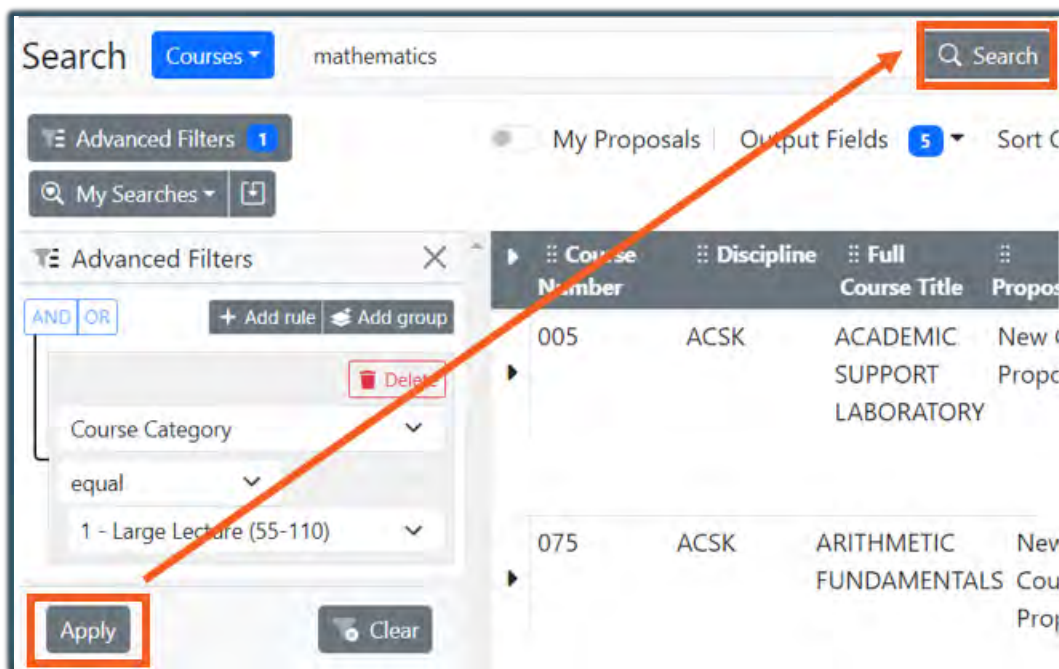


Figure 19.3-7

### Information:

- At any point, you can Delete Rules and Groups by clicking on the red Delete button.
- It is recommended that you Save Advanced Filters you have created to My Searches. That way Filters can be easily reused if needed.

### 19.3.1 Search Advanced Filters Example Explained

In Figure 19.3.1-1, there are four different Rules using the OR operator. The Rules are looking exclusively for Status that that is Active, OR Cancelled, OR Historical, OR Deactivated. If the Search were Applied, all returned results would be in either Active, Cancelled, Historical, OR Deactivated Status.

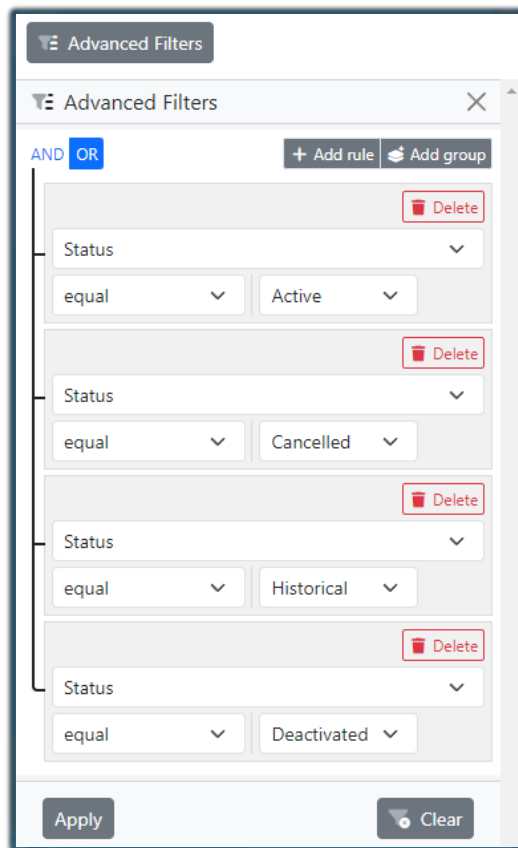


Figure 19.3.1-1

## 19.4 Output Fields

Since all institution’s naming conventions are unique, curriQūnet META will always dynamically update naming conventions to be consistent to your institution’s proprietary preferences. You can easily customize what headers will show up on your Search screen by selecting Fields.

In the example below, there are five headers, so 5 displays to the right of Output Fields.

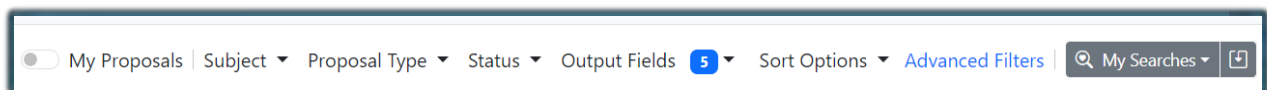


Figure 19.4-1

Here’s how you Add/Remove Output Fields from the Search columns:

1. ↗ First click the Output Fields button.
2. The Output Fields window will now appear.
  - ↗ Click the relevant Field’s Category drop-down arrow or text to open the sub-category.

For example, in Figure 19.4-2, Cover was selected as the Output Field category.

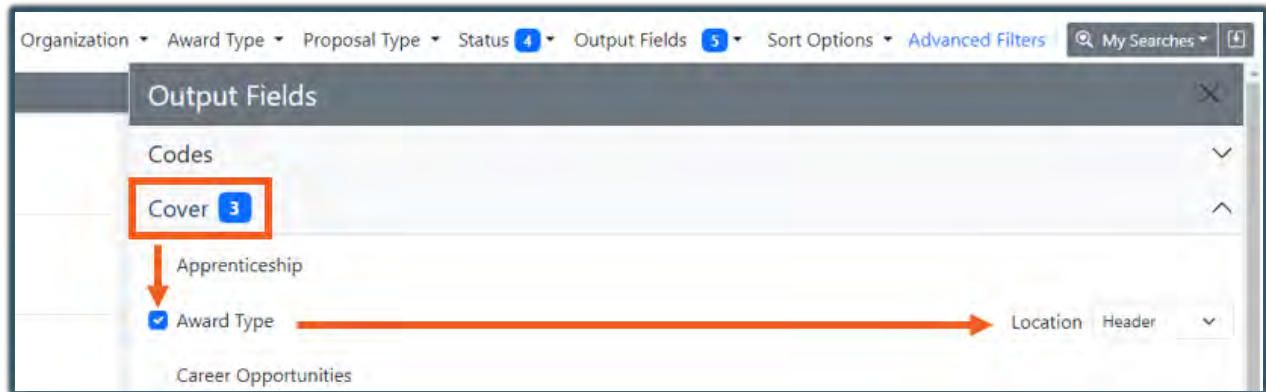


Figure 19.4-2

3. ↗ Per Figure 19.4-2 , select the appropriate Fields.

**Information:**

Untick the box to deselect an Output Field. Doing this will remove the Output Field from the Search column.

4. ↗ Now, from the Location drop-down, select where you'd like the Field to appear either as a Header or within the Detail Panel.

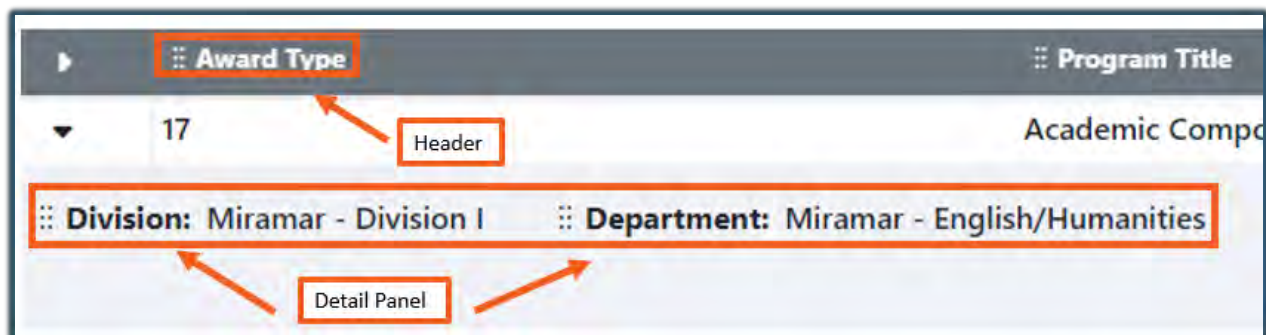


Figure 19.4-3

5. ↗ Once you have selected or unselected all the desired Fields, click the X button located at the top right of the window.  
In this case, your changes will not be Deleted as they typically would be when clicking the X icon. You can also click anywhere outside of the Output Fields selection box to exit.

**Information:**

To see the updated revisions to the Output Fields in Detail Panel view, you will have to re-open the Detail Panel view. However, Heading Output Field revisions will display automatically. (Figure 19.4-3)

## 19.5 Sort Options

Clicking on Sort Options located at the top right of the Search screen will allow you to arrange Fields by either Ascending or Descending order.

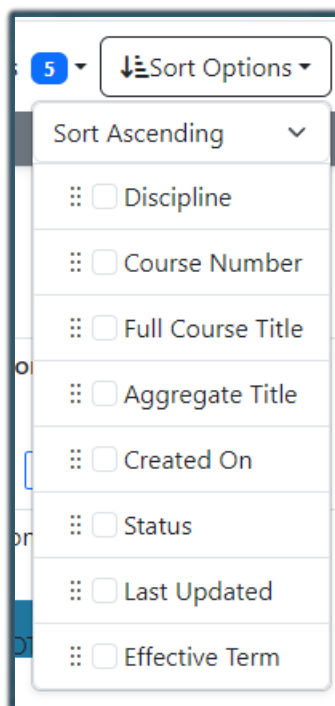


Figure 19.5-1

### Selecting 1 option under Search Options

If you tick one option, your sort will be prioritized by what you have selected.

For example, in Figure 19.5-2, Course Number has been selected, and the Sort Option is set to Ascending. As a result, the Search will be prioritized by Course Number.

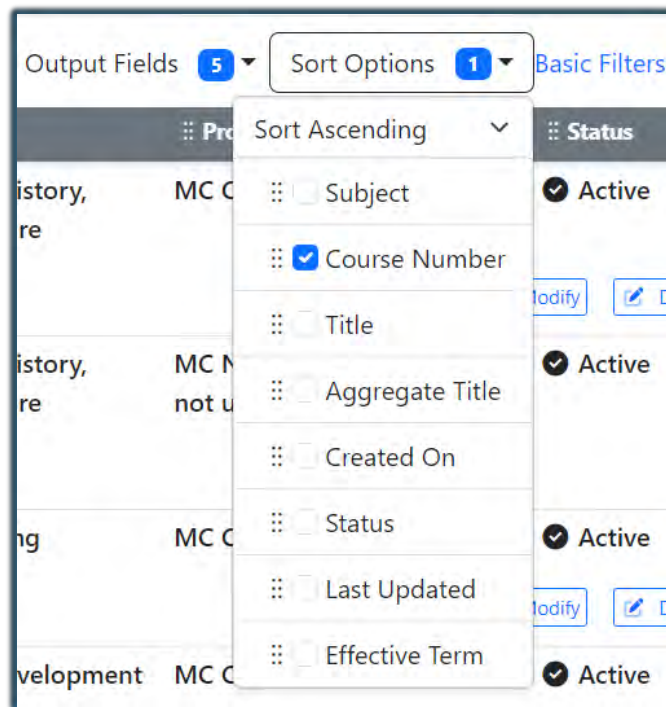


Figure 19.5-2

### Selecting multiple options under Search Options

In the example below, Course Number and Full Course Title were selected to Sort Descending. Since more than one Sort Option was selected, the order of selection from top to bottom takes priority. As a result, Course Number takes the primary priority, followed by Full Course Title taking secondary priority.

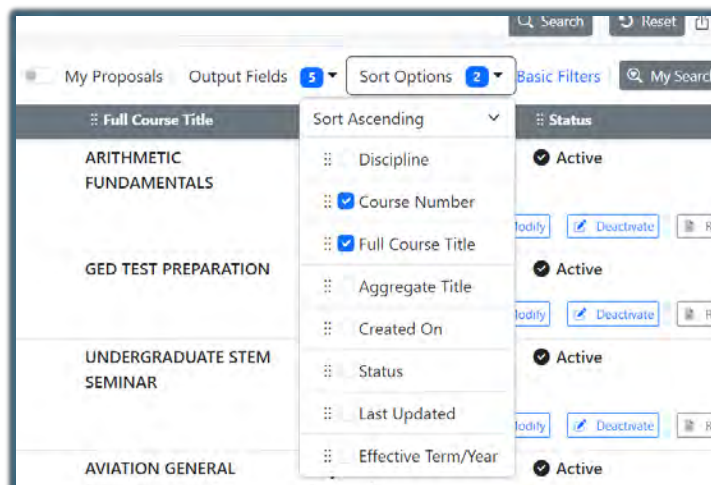


Figure 19.5-3

## Use case:

For example, a registrar or a curriculum committee may request a curriculum manager to provide a list of all Courses by Discipline and Status from 1993 to 2023, from oldest date to newest date, in order to see which Courses have not changed within that timeframe.

## 19.6 My Searches

Anytime you have complex Searches, for example with several Filters, it may be helpful for you to Save the Search for use at a later time.

Follow these steps to seamlessly Save a Search:

1. ↗ After you have conducted your Search, click on the Save Search button located on the right-hand side of the screen.

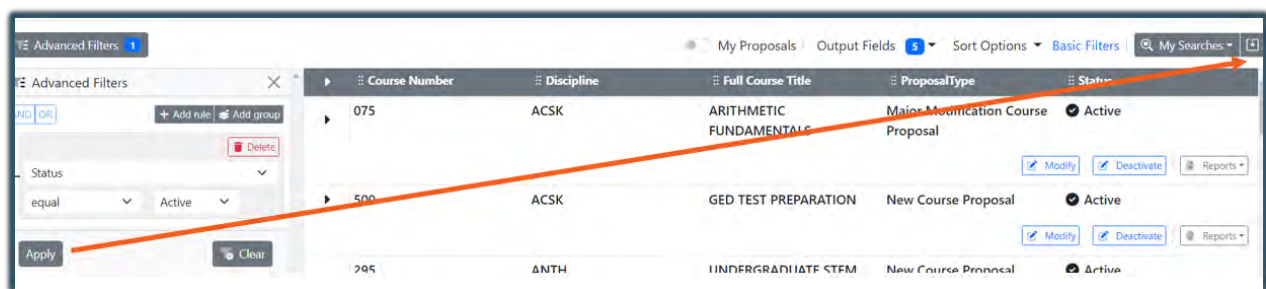


Figure 19.6-1

2. The Save Search window will now open.
  - ↗ Select the appropriate radio button for the Saved Search.
    - **Save this Search as the default Search for Courses**
    - **Save this Search to my Saved Searches** – This Search is saved for use when you are logged into your account.
    - **Save this Search as the Public Search for Courses** – The Saved Search will be accessible on the Public splash page.

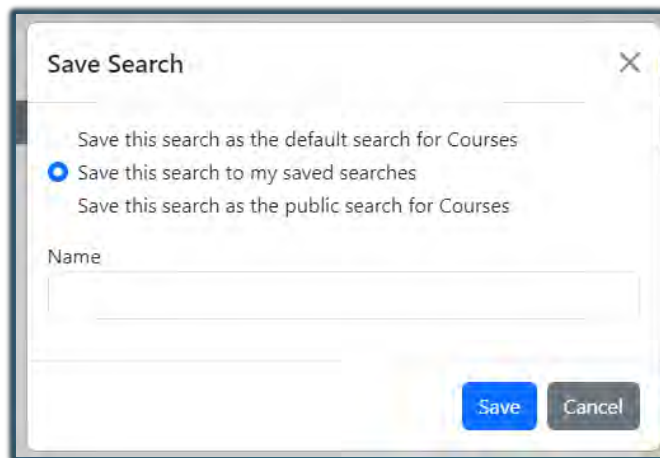


Figure 19.6-2

3. If you selected Save this Search to My Saved Searches, name your Search.
4. Last, click the Save button.  
Clicking Cancel will close the window without Saving any of your changes.
5. If you selected Save this Search to My Saved Searches and click the gray My Searches button located on the upper right-hand side of the screen, you will now see your Saved Search.

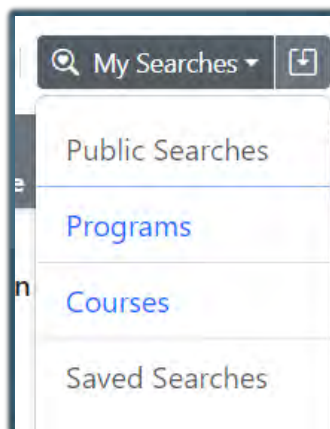


Figure 19.6-3

6. To run the Saved Search, simply click the Search Title from the My Searches menu, and that Search's results will now populate.

**Use case:**

*An example of a way Saved Searches could be useful would be if a Dean wanted to see how many Biology Courses there were in Draft Status every month. Rather than re-running the Filter each month, the Dean could simply re-run their Saved Search.*

## 19.7 Searching for Reports

Anytime you conduct a Search and [Reports](#) for that Proposal are available, the Reports button will display.

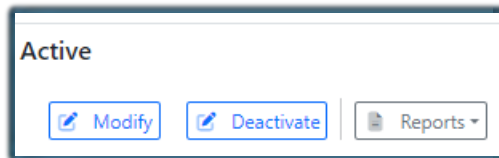


Figure 19.7-1

**Information:**

*Anywhere throughout the website that you see the Reports button as shown in Figure 18.8-1, you can access Reports*

To view Reports for a Searched for Proposal, simply click the Reports button that displays with the Proposal. A list of Reports you have access to viewing will appear in the drop-down menu.

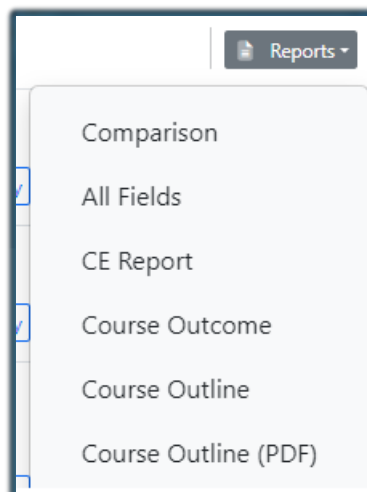
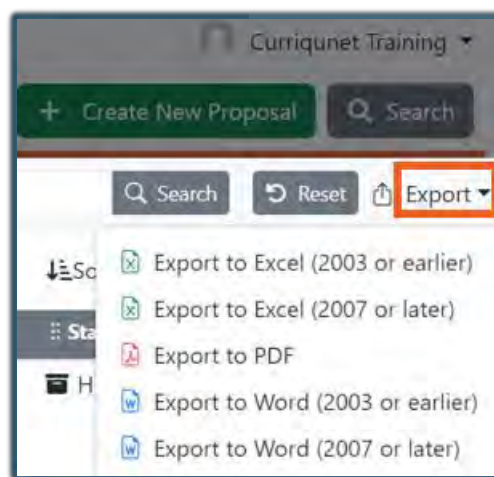


Figure 19.7-2

## 19.8 Exporting Search Results

You may want to Export your Search results and you can easily do so if you are logged into your institution's curriQūnet META account.

1. ↗ After the Search has been conducted, click the Export button located beneath the Search button.
2. A list of Export options will appear.
  - ↗ Select which format you would like the Export in.



*Figure 19.8-1*

Upon clicking the Export button, your file will show up in your computer's downloads folder.

## 19.9 Comparison between Public Search and Global Search

Overall, the Public Search and Global Search function very similarly, however the Public Search can be configured more restrictively to limit Searches for individuals who do not have platform login information.

# curriQūnet | meta

Below is a comparison chart between attributes of what can be done in a Public Search versus Global Search.

Feature	Public Search	Global Search
Keyword Search	Yes	Yes
Select Search Category	Yes	Yes
Output Fields	Yes - Limited	Yes
Advanced Filters	Yes	Yes
Sort Options	Yes	Yes
Export	No	Yes
Reset	Yes	Yes
Modify	No	Yes
Reports	Yes – Limited by client specifications	Yes
Deactivate	No	Yes
My Searches	No	Yes
Description	Yes	Yes
Save Searches	No	Yes

Figure 19.9-1

## 20 Approvals

The Approvals page can be accessed a few different ways – either from the Curriculum menu in the Global Navigation, via the main Search functionality, or to the right of the Reports menu within the Global Navigation in certain instances.

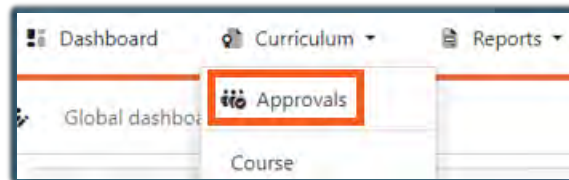


Figure 20-1

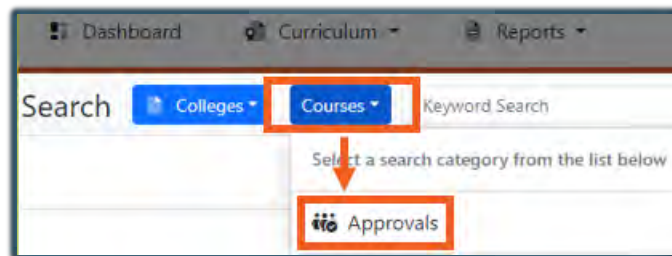


Figure 20-2

Once on the Approvals page, you will notice that you are also on the Search screen with all the Approvals populated. Essentially, this page shows all the Proposals you, the Admin or User, should be addressing.

All Approvals Pending your Changes will appear highlighted in red, as they require attention.

Proposal Type	Organization	Subject	Title	Position	Pending Changes
MC Assessment 1 - SLO Assessment	Miramar - Technology	BUS	BUS 20. SLO S'22	MC - Assessment Coordinator	No
MC Course Modification		ANTHR	ANTHR 013 - Urban Anthropology	MC - Assessment Coordinator	Yes
MC Course Modification		LRNRE	LRNRE 562 - Basic Math for Life and Career Success	MC - Assessment Coordinator	Yes
MC Course Modification		LRNRE	LRNRE 214 - Adaptive Technology for Web Page Design	MC - Assessment Coordinator	No
MC Course Modification		PSYCH	PSYCH 010 - Psychology and Life: Basic Principles	MC - Assessment Coordinator	No
MC Course Modification		ANTHR	ANTHR 003 - Introduction to Social and Cultural Anthropology	MC - Assessment Coordinator	Yes

Figure 20-3

Click into any Proposal Type and you will be directed to the Workflows History and Actions page.

### 20.1 Workflows History and Actions Page

On this page, you can see the History for your Proposals or take Action on Proposals for yourself

if you are a User or Administrator, or take Action for someone else if you are an Administrator. Examples of Actions you can take here include adding Comments or Attaching supporting documentation.

From here you can do/view the following:

**View Course Proposal** – Click here to navigate to the Course Proposal. You can see the Proposal’s status here.

**Take Action as an Administrator** – Administrators can take Action on behalf of other Users.

**Administratively Move the Proposal to a New Level** – Skip to other Levels within a Workflow without needing individual Position Approvals.

**History**– Clicking here shows the History of all the Actions within a Workflow including Comments.

**Status** – Clicking Status will show a visual representation of where the Workflow currently is. Available Statuses are Under Review, Review Pending, and Complete.

**Level Summary** – This tab shows a high-level summary of each section of the Workflow. Fields include Action Date, Username, Step Type (if Optional/Required), Action Comments, and Action Title.

**Notes** – This tab will only appear if Notes are enabled by curriQūnet.

**Attachments** – Click here to View and upload Attachments to the Workflow. An example Attachment would be an email which a person has sent requesting an Admin to take Action on their behalf.

As you can see in Figure 20.1-1, most recent Actions always appear at the top of the list descending to older Actions at the bottom of the list.

LANHT 851 - Dry-Summer Garden Design

[View Course Proposal](#)

History | Status | Level Summary | Attachments

Action Date	Step	Step Type	User Fullname	Action	Action Comment
-	MC - Technical Reviewer	Required	No users assigned	Skipped	-
12/1/2023 4:28:15 PM	MC - Curriculum Specialist	Required	CMCAAdmin User	Implement	Relaunch
12/1/2023 4:25:35 PM	MC - Curriculum Specialist	Required	CMCAAdmin User	Implement **Unapproved by CMCAAdmin User (12/01/23) **	Committing
12/1/2023 4:19:12 PM	MC - Assessment Coordinator	Required	CMCAAdmin User	Skipped	-
12/1/2023 4:19:12 PM	MC - Assessment Coordinator	Required	CMCAAdmin User	Approved	N/A 2
12/1/2023 4:14:01 PM	MC - Department Chair	Required	Chris Grampp *Inactive User*	Skipped	-
12/1/2023 4:14:01 PM	MC - Department Chair	Required	CMC Faculty User	Skipped	-
12/1/2023 4:14:01 PM	MC - Department Chair	Required	CMC Faculty User	Skipped	-
12/1/2023 4:14:01 PM	MC - Department Chair	Required	Laura Forlin *Inactive User*	Skipped	-
12/1/2023 4:14:01 PM	MC - Vice President of Instruction	Optional	CMC Faculty User	Skipped	-
12/1/2023 4:14:01 PM	MC - Division Dean	Optional	CMCAAdmin User	Skipped	-
12/1/2023 4:14:01 PM	MC - Vice President of Instruction	Optional	Denise Richardson *Inactive User*	Skipped	-
12/1/2023 4:14:01 PM	MC - Division Dean	Optional	Jason Holloway *Inactive User*	Skipped	-
12/1/2023 4:14:01 PM	MC - Department Chair	Required	CMCAAdmin User	Approved	N/A

Figure 20.1-1

As you can see in Figure 19.1-1 above, most recent items will display at the bottom of the list with older items displaying at the top of the list. If any dates are blank, like the top item on the list in Figure 19.1-1, The date will automatically populate dependent on the Action that takes place for that item.

**Information:**

*It is important to note that only Admins will see the Workflows Summary page. Both Users and Admins will be displayed the Approval Update page.*

## 20.2 Inactive Users

Inactive Users on the Workflow History page are indicated in the User Fullname column of the History tab.

User Fullname
CMC Faculty User
CMC Faculty User
CMCAAdmin User
Anthony Powell *Inactive User*

Figure 20.2-1

If there are Inactive Users on the Workflows History page and the Step they are assigned to in the Workflows is required, the Workflow cannot move until an Admin goes into the system and [manually moves](#) the Workflow, or Reassigns the Step to someone else. If there are multiple Users assigned to a Step in the Workflow and one of them is Inactive, the best Action to take as an Admin would be to remove the required Inactive User from the Workflow, and then the Workflow can continue to move as designed.

### 20.3 View Course Proposal

Click on the View Course Proposal button located beneath the Course Title.

**MC Course Modification: ANTHR 013 - Urban Anthropology**

[View Course Proposal](#)

**Take action as an administrator**

Select One

Figure 20.3-1

From this page, you can View the entire Course Proposal, including Forms. Beside the Course Title, you can see the Course Status. In the example below, the Course Status is In Review. To the right of the Course Status is the option to View Proposal History.

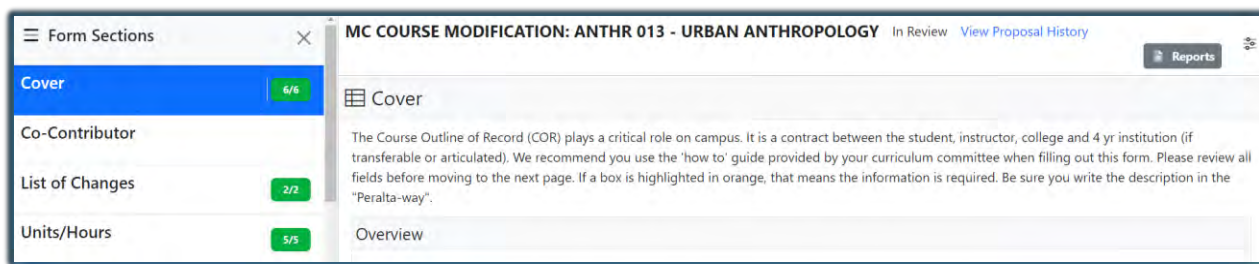


Figure 20.3-2

## 20.4 Notes

From this Tab, you can [Add](#), Edit, and View Approval Notes.

### **Information:**

*As previously mentioned, this tab will only appear if Notes are enabled by curriQūnet via a [support ticket](#). If Notes have been enabled in your account but you do not see the Notes tab, log out and log back in again.*

In the Figure below, Notes has not been enabled, and as a result the Notes tab does not appear.

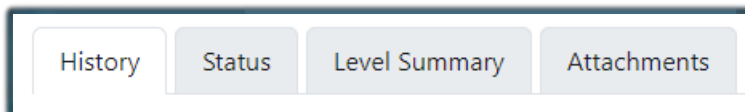


Figure 20.4-1

In the Figure below, Notes has been enabled, and as a result the Notes tab appears.

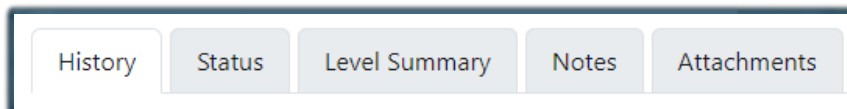


Figure 20.4-2

### 20.4.1 Add Notes

Follow these instructions to Add Notes:

1. ↗ First, click on the Notes Tab.
2. ↗ Click the Blue Add Note button.

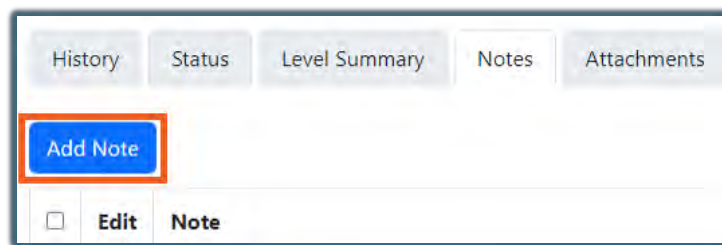


Figure 20.4.1-1

3. The Add Note window will pop-up.  
↗ First, select the appropriate Position Group.

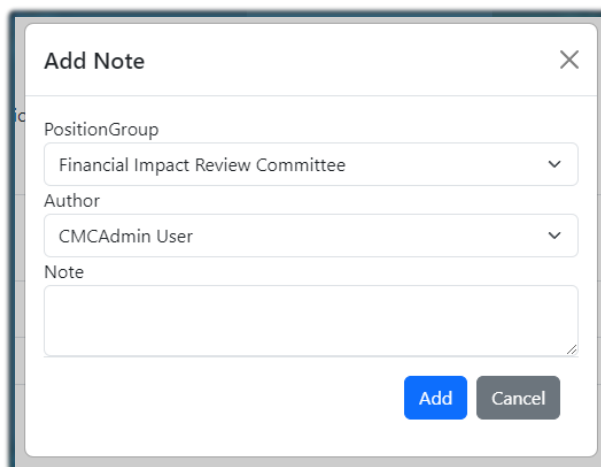



Figure 20.4.1-2

4. ↗ Next, select an Author.

**Information:**

*Remember, as an Administrator you can write a Note on behalf of someone else. As a result, Admins can assign a different person as the Author than themselves.*

5.  Now Type in the Note content.
6. ↗ Click the Add button located below the Note text box.

The Note will now appear in the body of the page.

#### Use case:

*An example of a Note in this case would be a faculty member requesting another faculty member take action on their behalf. A reply comment might be something like 'I received a request to take action on behalf of Janet Doe on 12/3/2023.'*

## 20.5 Take Action as an Administrator

Here are the steps to Take Action as an Administrator:

1. ↗ the Position who will Take Action as an Administrator from the drop-down menu. Admins can also select to Delete Proposal or Unlaunch the Proposal from here. Unlaunching the Proposal will put it back in Draft Status. If a Proposal is Unlaunched, the relevant Position can make the changes and Relaunch the Proposal.
2. ↗ Click the OK button.

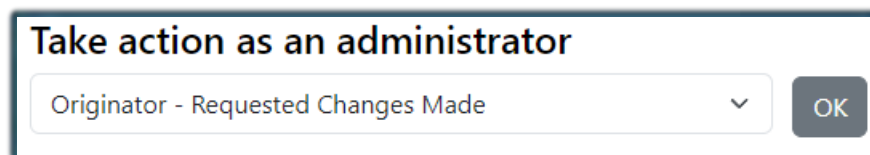


Figure 20.5-1

You will now be navigated to the Approval Update page.

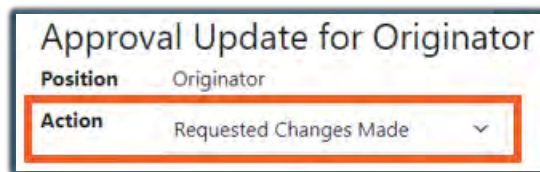
## 20.6 Approval Update

Follow these steps to use the Approval Update page:

1. ↗ Select the Action from the drop-down menu. The available options are Approve, Disprove, Request Changes, or Implement.

### Information:

- *Note that available Actions will vary depending on User assigned Permissions and if the person was a required or optional Step within the Workflow.*
- *If a Step is required in the Workflow, a Position must be assigned.*
- *If Changes are Requested, after the revisions are made, the Proposal will usually return back to the Originator in the Workflow's specified Step. However, this behavior is completely customizable.*






Approval Update for Originator

Position Originator

Action Requested Changes Made

Figure 20.6-1

3.  Type in any Comments. Comments are not required.
4.  Click the Commit button to Save the comment.  
These will display as Action Comments within the History tab.
5.  Select the Activation Date.  
This is the Date the update will occur on. If a future Date is selected, the Proposal will queue in an Approved state even though all of the Approvals have not yet been met.

**Use case:**

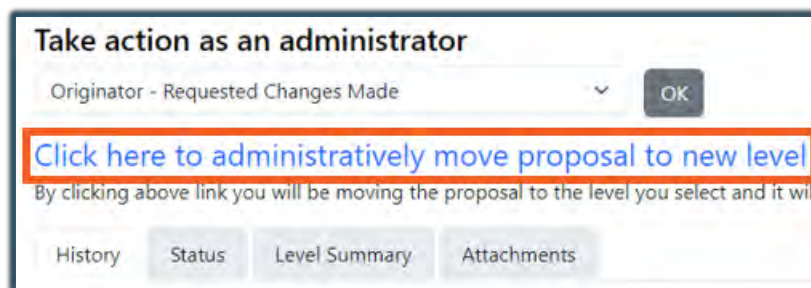
An example of when a future Date is selected is when a Dean knows something needs to move through the system. Perhaps they want to set this up a year in advance, to occur the following school year. Setting an advanced Date allows changes to be made prior to the actual Activation Date.

## 20.7 Administratively Move to New Level

Administrators can force the Workflow to go to any step.

Here's how to Administratively move the Workflow Approval to a New Level:

1.  Start by clicking the Administratively Move to New Level text.



Take action as an administrator

Originator - Requested Changes Made

OK

[Click here to administratively move proposal to new level](#)

By clicking above link you will be moving the proposal to the level you select and it will

History Status Level Summary Attachments

Figure 20.7-1

2. You will now be routed to the page where you can select which Level to move to, meaning any pending User Approvals will be skipped.  
The Level the Workflow is currently on is within the purple box as shown in the figure below.

↗ To select the respective Level to move to, click the radio button to the right of the Level.

The Selected Level will now appear in a gray box.

**Administratively move proposal to new level**

Select a level to move the proposal to. Any pending users will automatically be skipped. The action will be recorded.

**Level 2**

MC - Department Chair    MC - Division Dean    MC - Vice President of Instruction

**Level 3 (current level)**

MC - Articulation Officer    MC - Assessment Coordinator    MC - Distance Education    MC - Librarian

**Level 4**

MC - Technical Reviewer

OK    Cancel

Figure 20.7-2

### **Information:**

You can move backwards or forwards in the Workflow.

#### **Use case:**

You may want to go backwards in the Workflow if someone did something incorrectly, changed their mind, had a different opinion, or even changed Roles at the institution. In this case, the User can go in reverse and repeat Workflow Steps making the appropriate revisions. Essentially, if the Workflow did exactly what it was supposed to do, but the human component needed to be addressed, a User may want to move backwards in the Workflow.

3. A pop-up window will now appear confirming the move.

↗ Click Confirm.

### **Information:**

If you chose to move forward in the Workflow, you will notice Steps in the Workflow had been skipped, as Approvals have been bypassed.

## 21 Proposals

Throughout this User Guide you have been learning about the concept of Proposals. Now it's time to go into greater detail about Proposals and how they function, such as [Creating Proposals](#), Deactivating Proposals, [Proposal Forms](#), [Properties](#), etc.

### 21.1 Create New Proposal

Click on the Create New Proposal button to create new Courses and new programs. This button can also be used to Modify and Deactivate Proposals.

The Create New Proposal button is located at the top right of the screen just below your Name.



Figure 21.1-1

To see an example Proposal Form, click [here](#).

Here's how you Create a New Proposal:

1. ↗ Click on the Create New Proposal button located at the top right of the Global Navigation.
2. Now the Create Proposal Window will pop-up.
  - ↗ Select the Proposal Type from the drop-down menu.

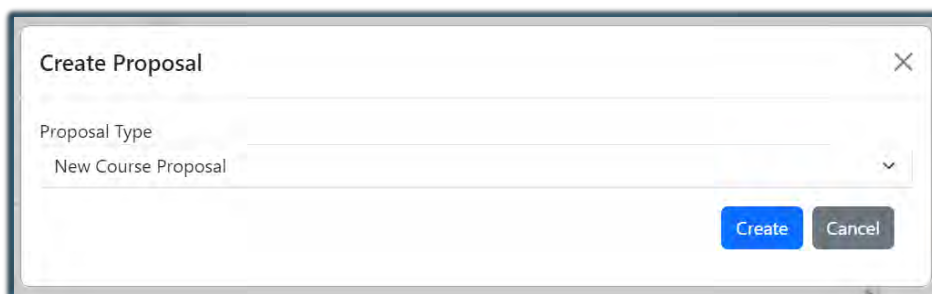
A screenshot of a 'Create Proposal' pop-up window. The window has a title bar with 'Create Proposal' and a close button (X). Below the title bar is a 'Proposal Type' label and a dropdown menu. The dropdown menu is open, showing 'New Course Proposal' as the selected option. At the bottom right of the window, there are two buttons: 'Create' (blue) and 'Cancel' (grey).

Figure 21.1-2

### **Information:**

Drop-down menu options will vary from one institution to another.

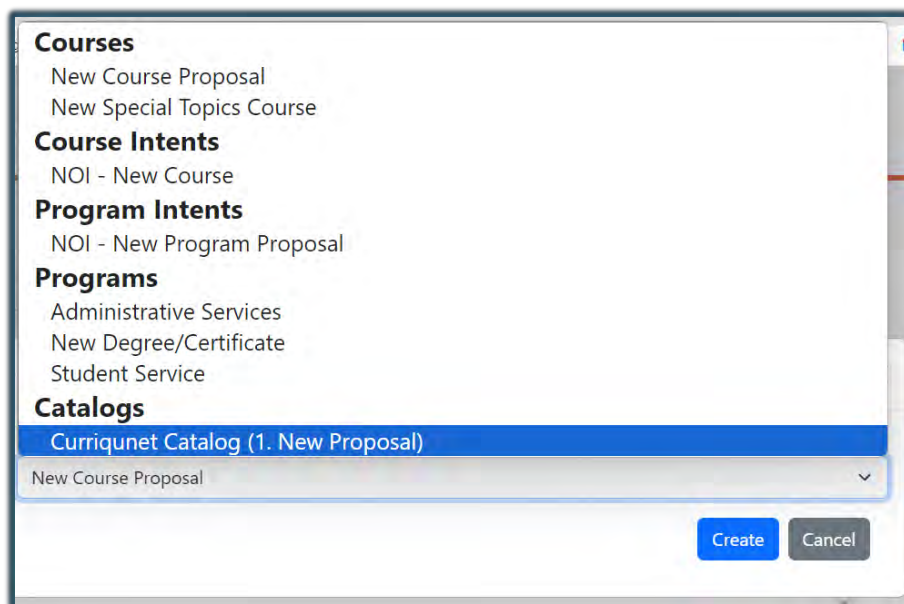


Figure 21.1-3

It is possible that your institution may need Approvals before Creating a New Proposal. The first step is letting curriQūnet META know you are thinking about creating the new Course, and the second step is acquiring Permission through the NOI (Notice of Intent) if required by your institution.

3. ↗ Next, click the Create button.  
You will now see the loading icon. On the back-end, META's system is populating the Proposal Form and the loading icon may be present for several seconds.

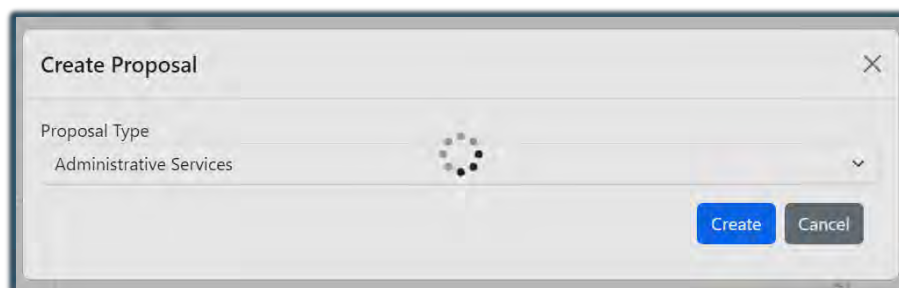



Figure 21.1-4

**Information:**

Be sure not to click the back button or refresh the page while the loading icon is present or else it may cause issues. As a result, you may need to Create the New Proposal from the first step again.

4.  Fill in all items throughout the Proposal. All required items will have an asterisk to the left of them and indicate 'This field is required' in red as shown in Figure 21.1-6 below the Program Title field.

You will also see in the yellow box on the right-hand side and upper left-hand side of the screen beside the Launch button how many required fields remain to be filled.

Once required fields are filled out, those fields will have a checkmark next to each of them.

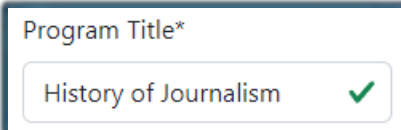


Figure 21.1-5

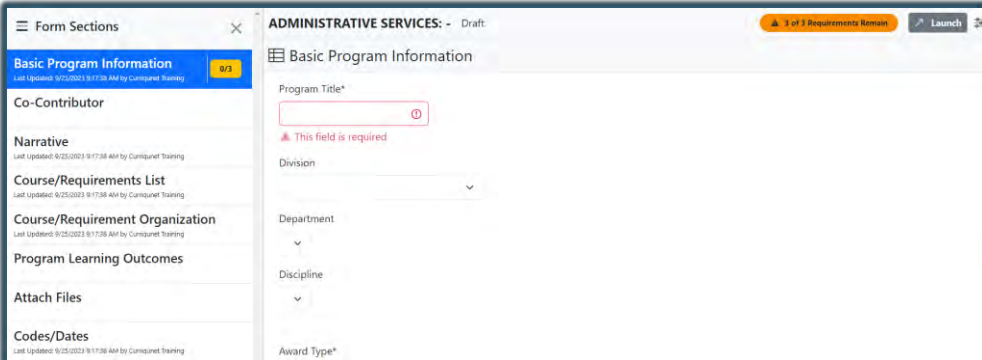



Figure 21.1-6

5.  Last, hit the Launch button located at the top right of the screen just below the Search button.

### **Information:**

Once all required information has been filled out, the Launch button will turn green.

After the New Proposal is Launched, it will now be in the Workflow where it will begin the institution's internal review and analysis process.

### **Information:**

Every institution has custom Forms. No two institutions will have identical Forms.

## 21.2 Example Proposal Form

Below is an example Proposal Form. Reference this to help you understand the Form you are filling out.

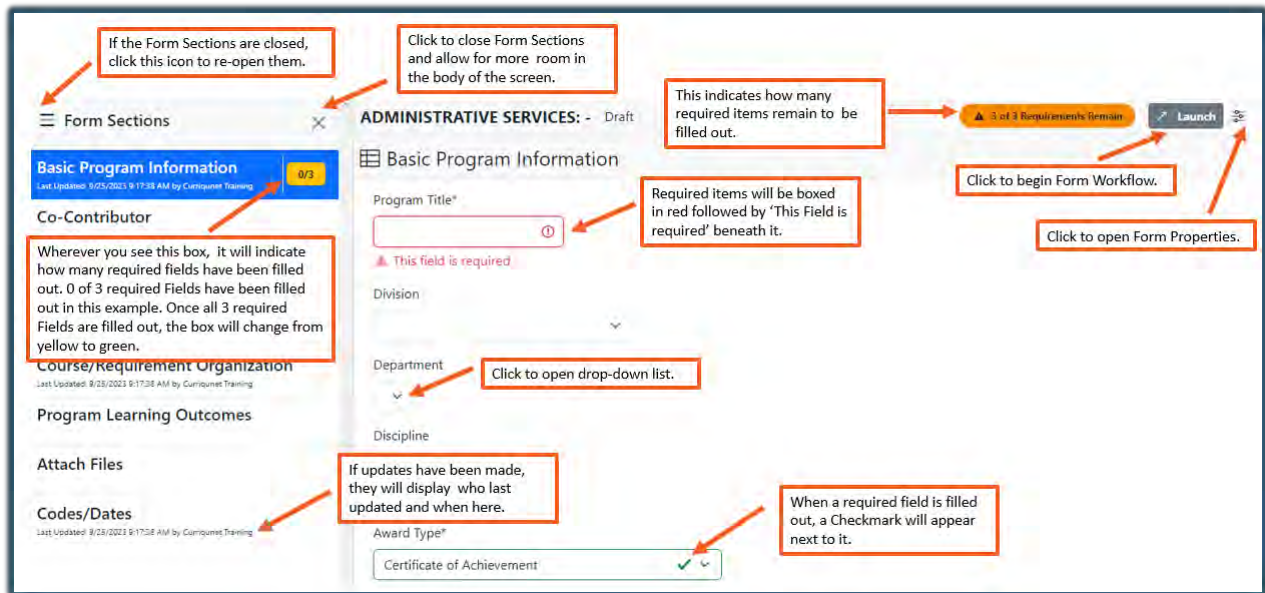


Figure 21.2-1

### 21.3 Form Properties

When you are Editing a Proposal Form, you may have the option to Edit Form Properties. Most of the time, there will not be Form Properties to Edit, but if there are you would see them after clicking the Properties icon located on the right-hand side of the screen to the right of the Launch button

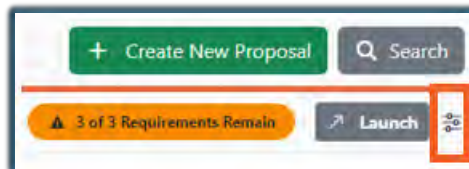


Figure 21.3-1

### 21.4 Modify a Proposal

If you would like to make changes to an existing Proposal, you must first Search for the Proposal. Once you have found the proposal you would like to make changes to, simply click the Modify button located within that Proposal line.

## 22 Help

After clicking on your Name, click the Help button to bring up curriQūnet's Resource Library.

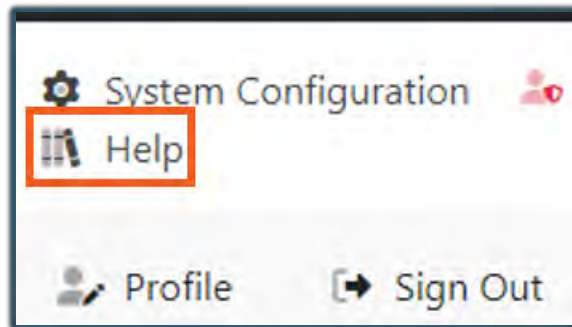


Figure 22-1

- **User Guides and Tutorials** – Navigate here to find helpful documentation, like a consolidated and partitioned User Guide, and other interactive tutorials.
- **Release Notes** – Navigate here to view and review release notes.

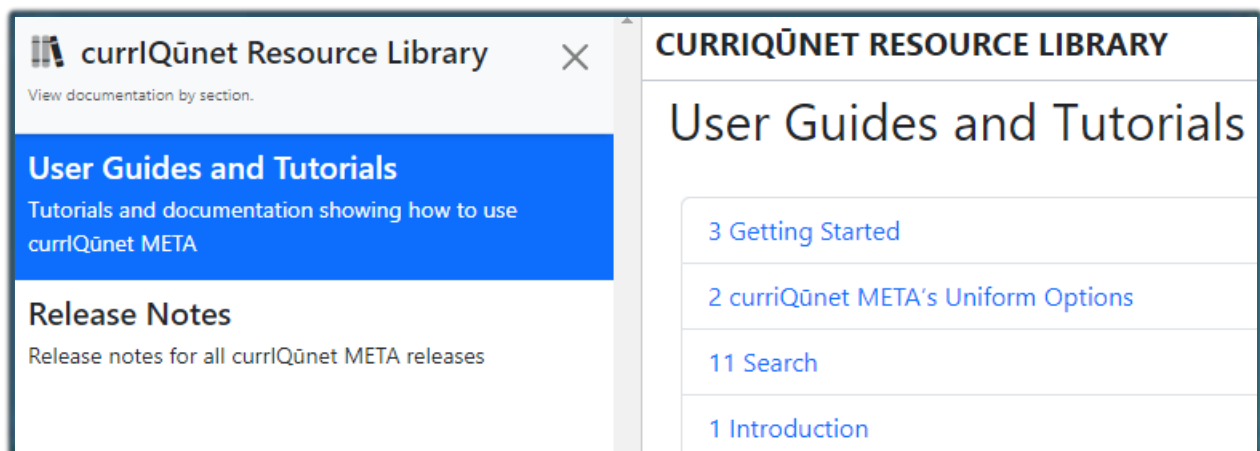


Figure 22-2

---

## Introduction

curriQūnet is now offering a new way to create and modify catalogs for institutions. The new catalog feature is more user-friendly and intuitive, and functions such as adding and editing pages and content have been greatly improved and streamlined.

Users are also able to view what their catalog will look like as they are working on it, rather than having to wait to view the finished product.

---

## Conventions in This Tutorial

Actions to be taken in this tutorial include either actions by keyboard or actions by pointing device. Where possible these actions are shown as follows:

 *Keyboard Action*

 *Pointing Device Action*

Information of particular importance is shown as:

 NOTE: Additional information of note.

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# Terminology

## Content Panels

Content panels can be shown or hidden. There are five types of content panels that can be shown on a page (also see below diagram):

### Header

A heading at the top of a page. Text is much larger and bolder by default than any other text.

### Body

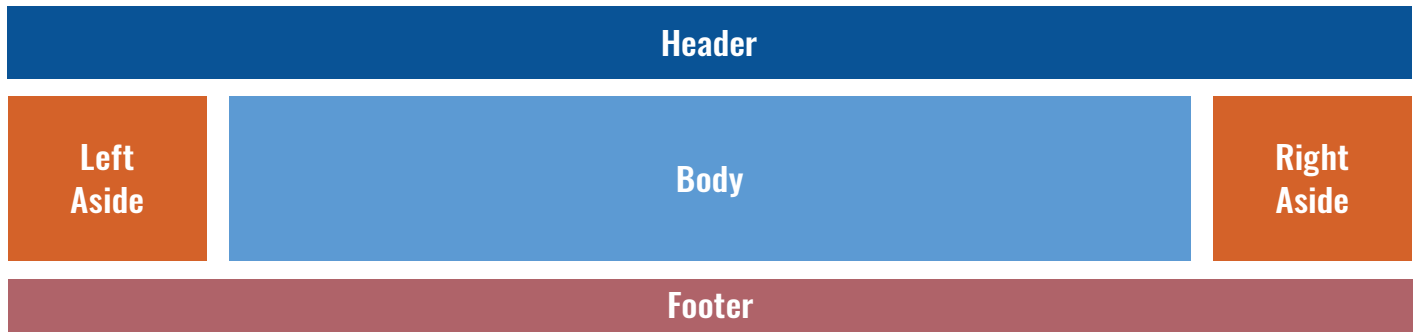
The main body of text on a page.

### Left & Right Aside

Text in its own section off to the side of the page (either on the left or the right, depending on which aside is chosen).

### Footer

A line of text at the bottom of a page. This could include any additional information about the institution, such as contact or copyright information.



## Terminology - continued

### Content Types

Content types can be added to content panels. The following content can be added to content panels:

#### Curriculum

Allows the user to add programs or courses from META. Types of curriculum panels include **Course Summary** (a summary of courses - these can be all courses in a **Subject** or all courses that have a certain **Course Number**), **Program Requirements** (all courses required to complete a program), and **Program Summary** (a summary of a specific program).

#### Formatted Text

Text that the user can format. Text can be bolded or italicized, and the font and size of the text can be changed; links, images, and tables can be added, etc.

#### Link List

Allows the user to add a list of links to a page which is organized in alphanumerical order. Each link comprises its own page.

#### Plain Text

Simple text which cannot be formatted by the user.

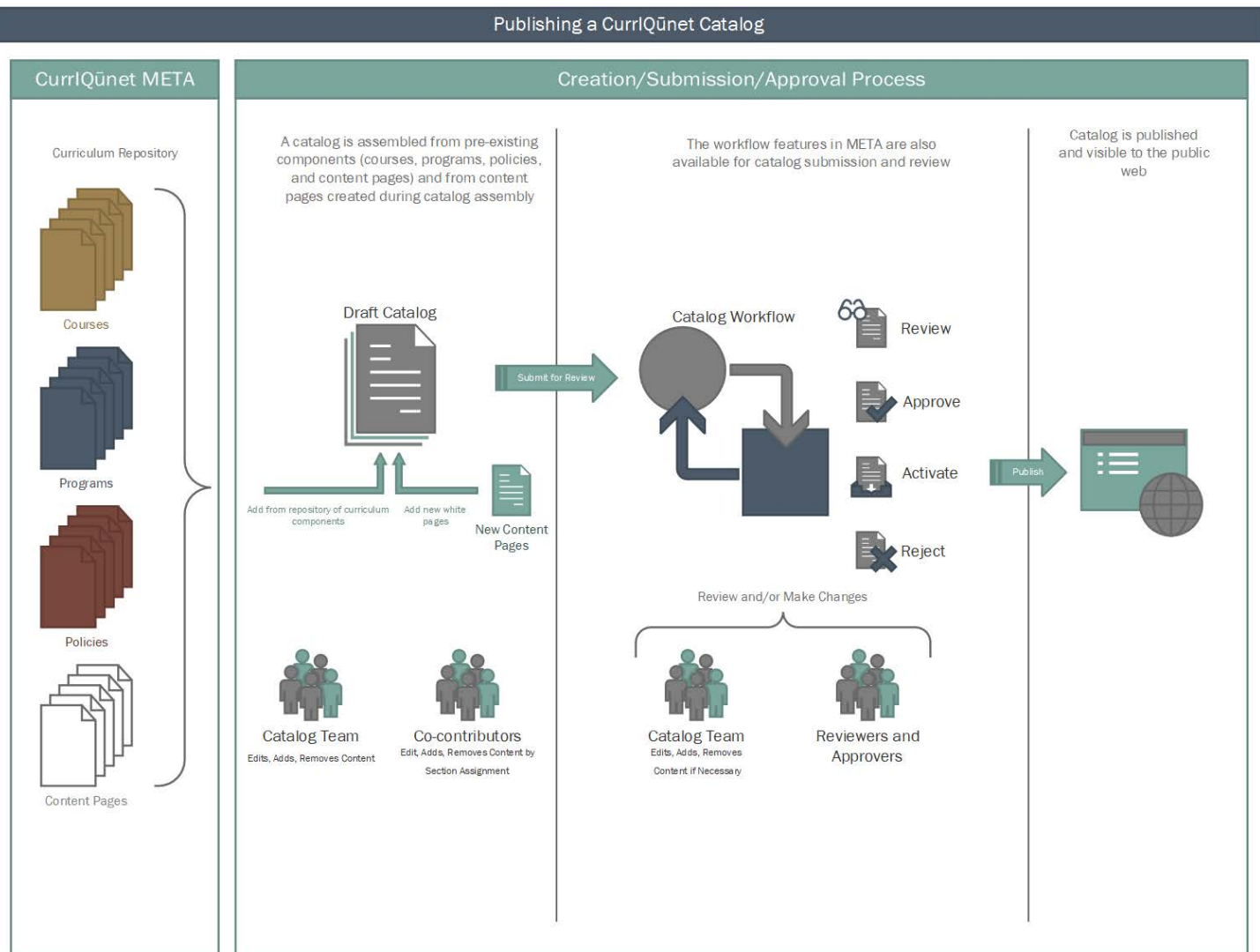
#### Tab Panel

Allows the user to add and organize content on a page into different tabs, each of which show different content when clicked. Each tab is functionally a page-within-a-page.

Content panels, content types, and how to add, edit, or delete them will be discussed in greater detail later in the guide.

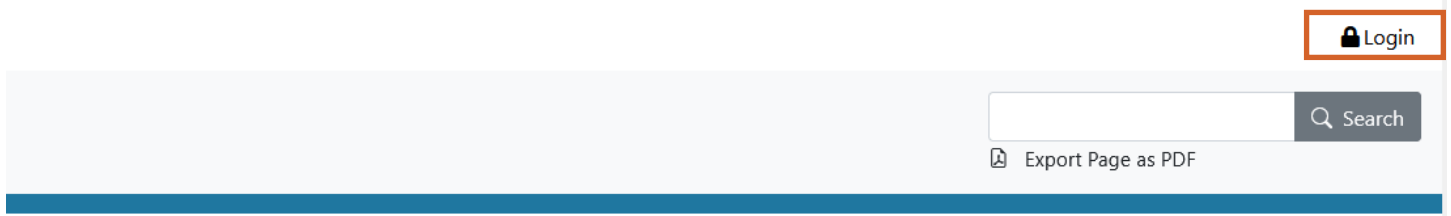
## Terminology - continued

Below is a diagram which illustrates the process a catalog proposal will go through in META before being published. These steps will be discussed in greater detail later in the guide.



## Logging In and Out

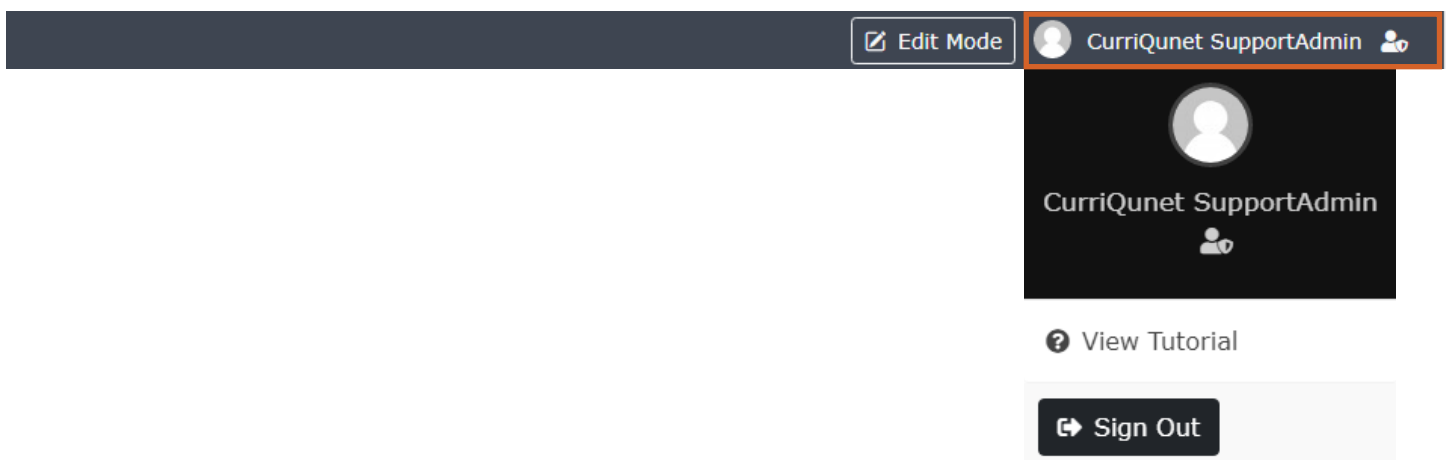
It is possible for anyone to view the most recent active catalog for your institution without logging in by simply navigating to your institution's catalog URL. However, if you want to modify an existing catalog, view past versions of the catalog, or create a new catalog, you must be logged in to do so.



➤ When you reach your institution's catalog page, click **Login** at the top righthand corner.

A screenshot of a login form titled 'Sign in to curriQūnet META Catalog Editor'. The form has a close button (X) in the top right corner. It contains two input fields: 'Email' with the placeholder text 'email@domain.com' and 'Password' with the placeholder text 'Password'. Below the password field is a blue 'Sign in' button. At the bottom of the form, there are two links: 'Forgot your password?' on the left and 'Request access' on the right.

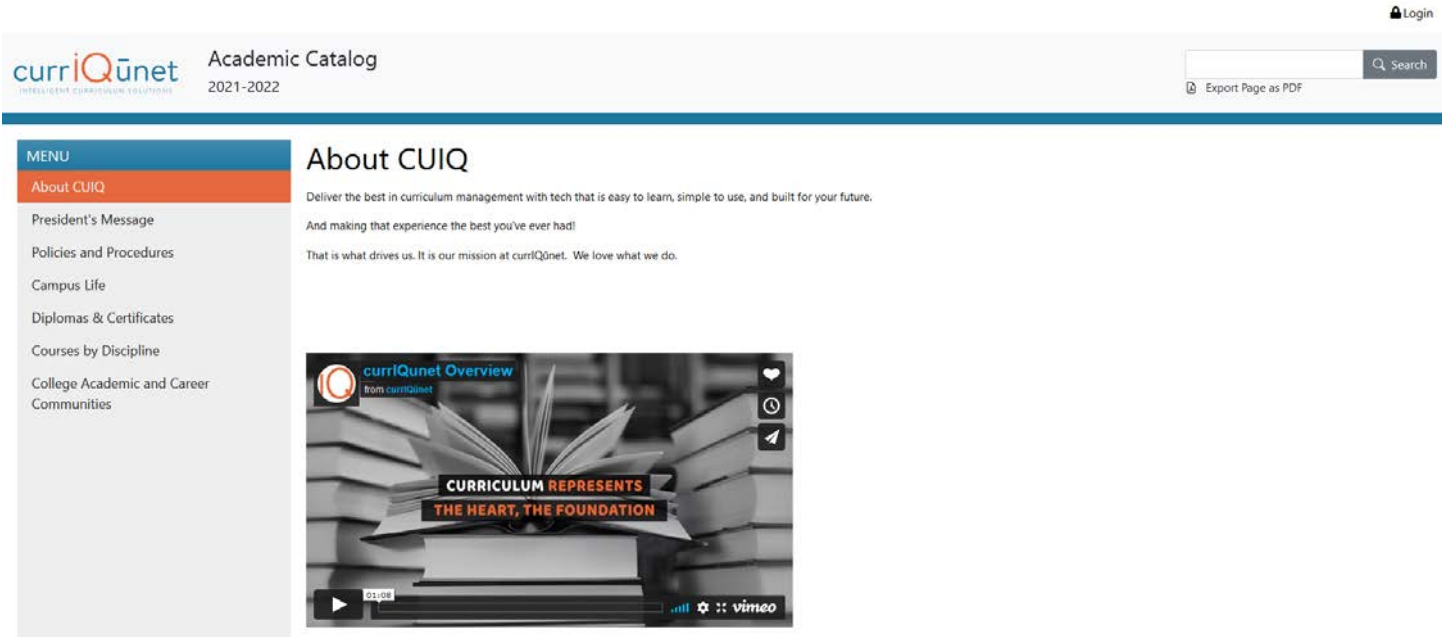
➤ Just as you would when logging into META, enter your email address and password and click **Sign in**.



➤ To log out once you are logged into the catalog, click your profile name and picture at the top righthand corner of the page and choose **Sign Out** from the dropdown.

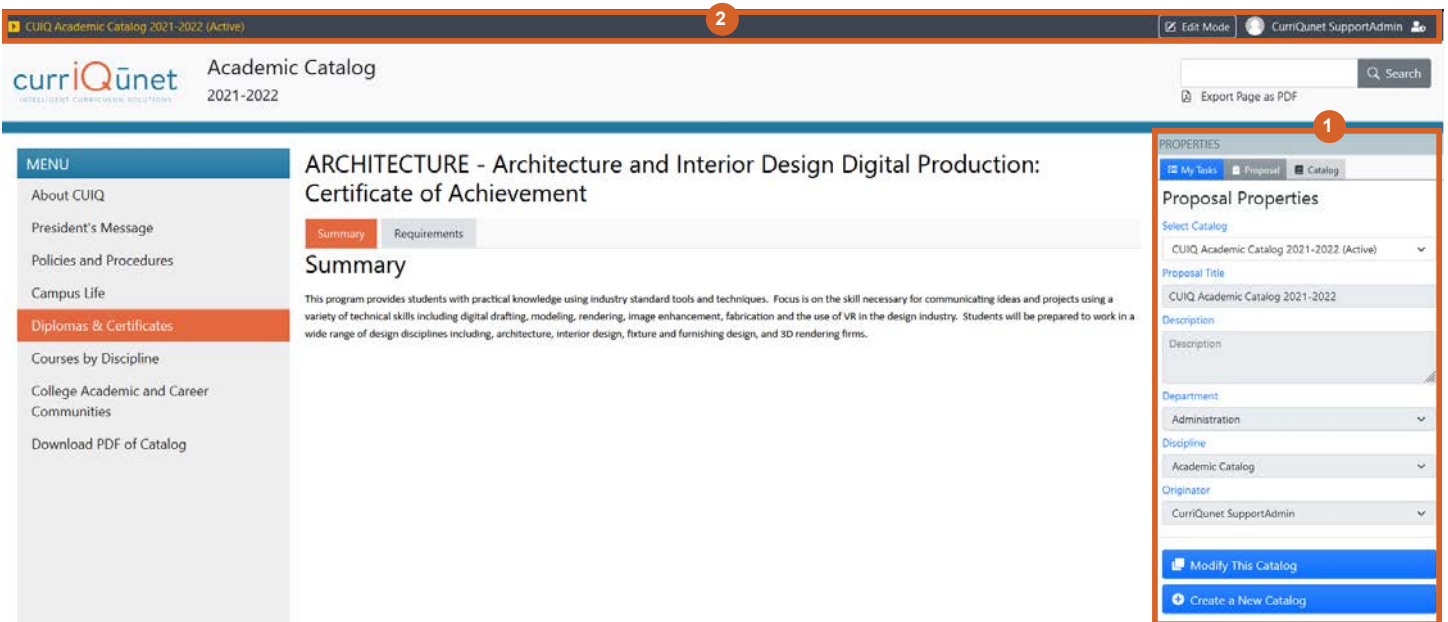
# View the Catalog

Below is an example of what the main catalog page would look like when accessed directly by URL without logging in:



Below is what the main catalog page would look like when logged in. By default, the main page is still that of the current active catalog for the institution, but there is an additional **Properties** sidebar (1) with several options for users to view past and current catalogs, modify an existing catalog, and create a new catalog. There is also a gray bar at the very top of the page (2) which lets you know which catalog version you are currently viewing. It also contains an **Edit Mode** button and the user's username and profile picture.

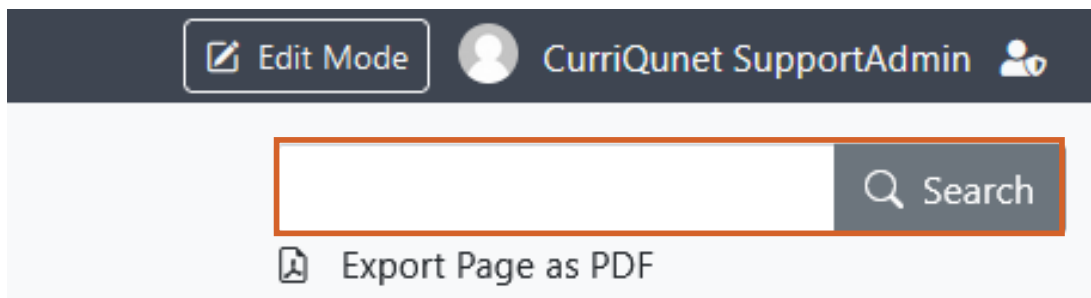
The **Properties** sidebar is explained in more detail on pp. 12-14, and **Edit Mode** is explained in more detail on pp. 15-16.



## View the Catalog - continued

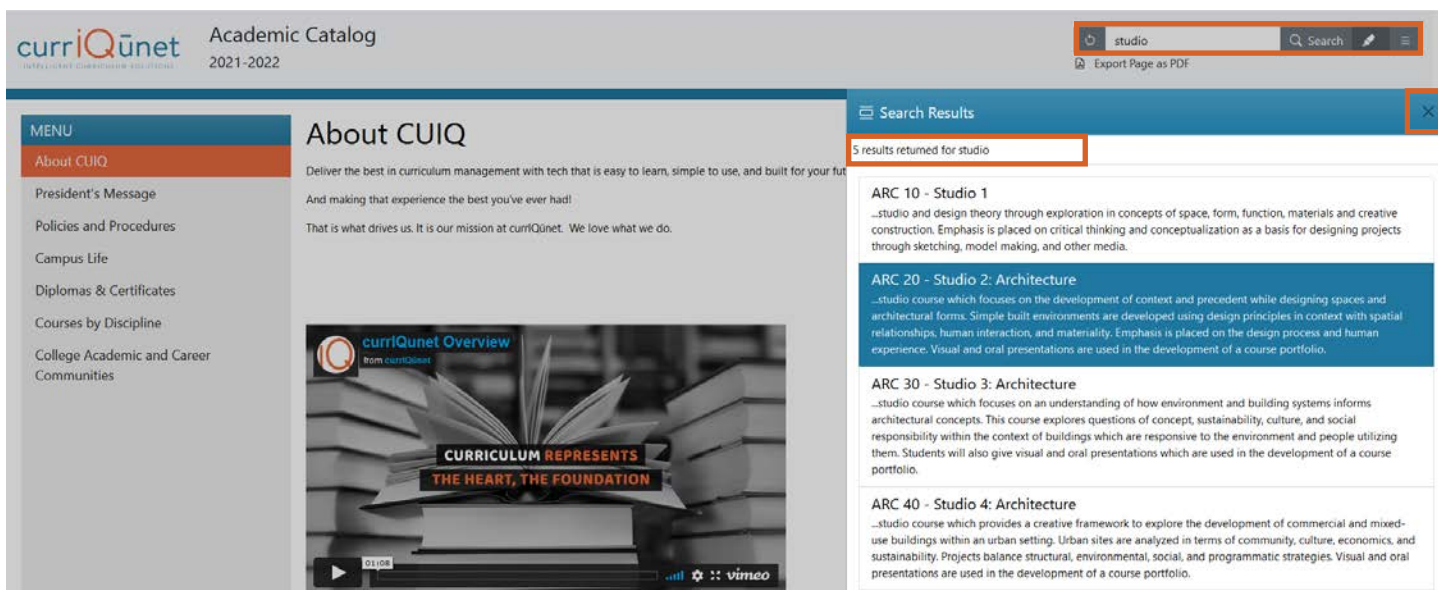
### Search Function




You can search for a specific word, phrase, page title, etc. in the catalog. This can be useful when you are not sure what page contains the information you are looking for and you need to find it quickly without browsing through every page.



 In the upper right corner, type what you are looking for in the **Search bar** and click **Search**.

Your search results will populate in a slide-out menu on the right side of the page. The number of results will show near the top of the menu.



 In the **Search Results** menu, click the result that has the information you want to view. To exit out of the **Search Results** menu without selecting a result, click the **X** at the top righthand corner of the menu. To clear search results and refresh the page, click the refresh button (  ) on the left side of the Search bar at the top of the page. To show or hide search results, click the menu button (  ) on the far right side of the Search bar.

# View the Catalog - continued

## Search Function - continued

After clicking on a search result, you will be taken to that page, where your search term(s) will be highlighted on the page for quick access.

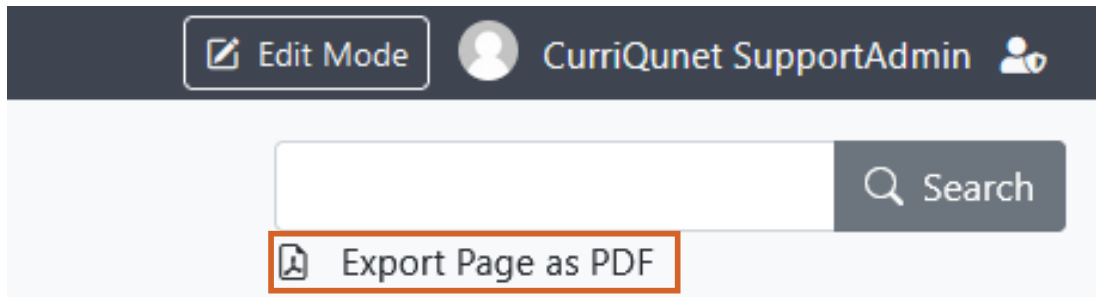
The screenshot shows the 'curriQūnet' Academic Catalog for 2021-2022. A search bar at the top right contains the term 'studio' and is highlighted in orange. Below the search bar, a 'MENU' sidebar on the left lists navigation options, with 'Courses by Discipline' selected. The main content area is titled 'ARC-ARCHITECTURE' and lists several courses. The search term 'studio' is highlighted in orange within the course titles and descriptions. For example, 'ARC 10—Studio 1 (3)' and 'ARC 20—Studio 2: Architecture (3)'. The descriptions for these courses mention 'studio' and 'design theory'. Other courses listed include 'ARC 11—Design Communication 1 (3)', 'ARC 21—Design Communication 2 (3)', 'ARC 30—Studio 3: Architecture (3)', 'ARC 31—Design Communication 3 (3)', 'ARC 88B—Independent Studies in Architecture (2)', 'ARC 88C—Independent Studies in Architecture (3)', 'ARC 90A—Architecture Internship (1)', and 'ARC 90B—Architecture Internship (2.5)'. The descriptions for these courses detail their focus on independent research, design theory, and professional settings.

Toggle the highlighter on or off by clicking the highlighter button (  ) next to the Search button at the top of the page. To show or hide search results, click the menu button (  ) next to the highlighter button.

## View the Catalog - continued

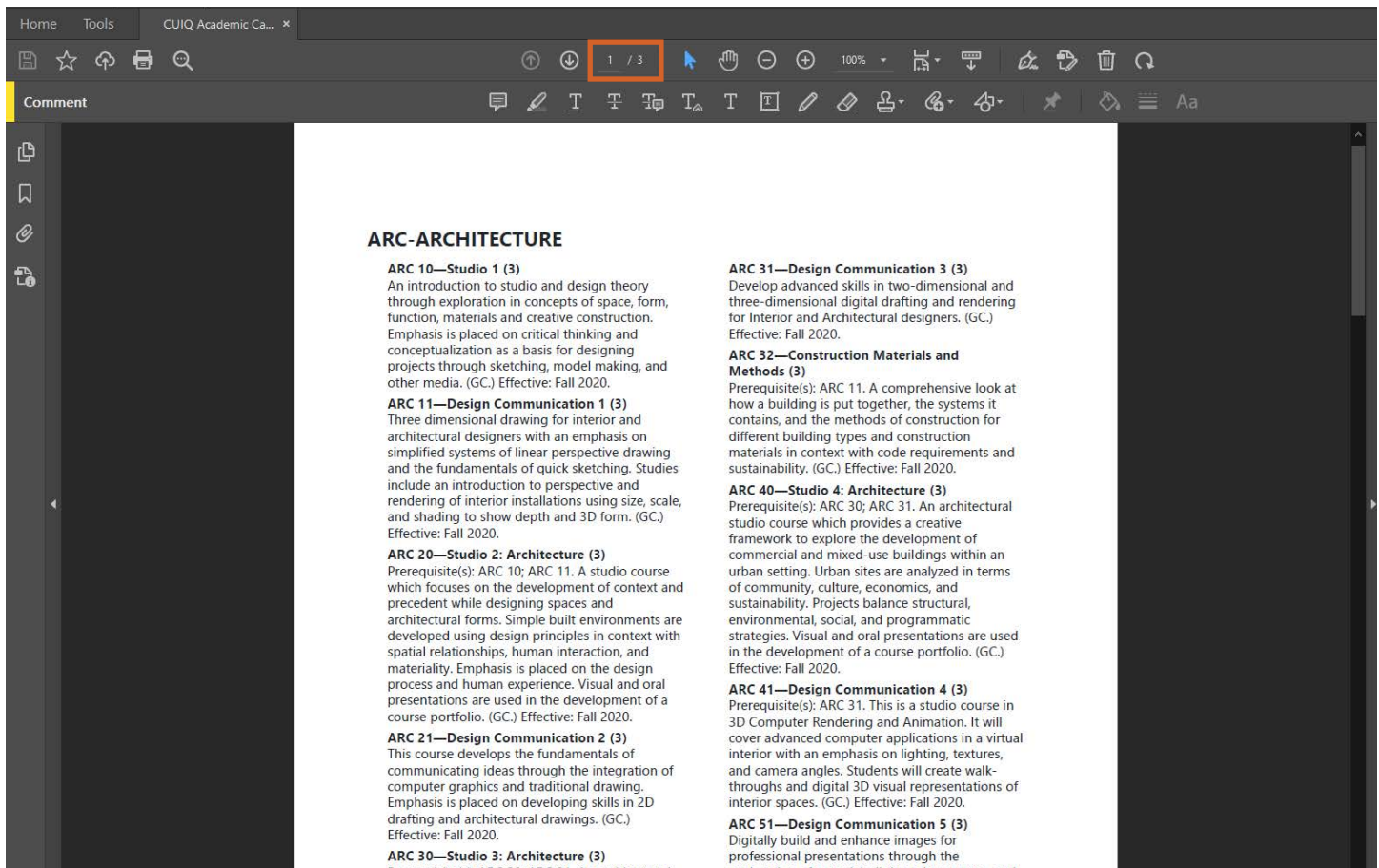
### Export Page as PDF/Download Entire Catalog

Any page in the catalog can be exported as a PDF. This can be useful if you need to save a particular page or pages for offline view.



➤ In the upper right corner, below the **Search bar**, click '**Export Page as PDF**'.

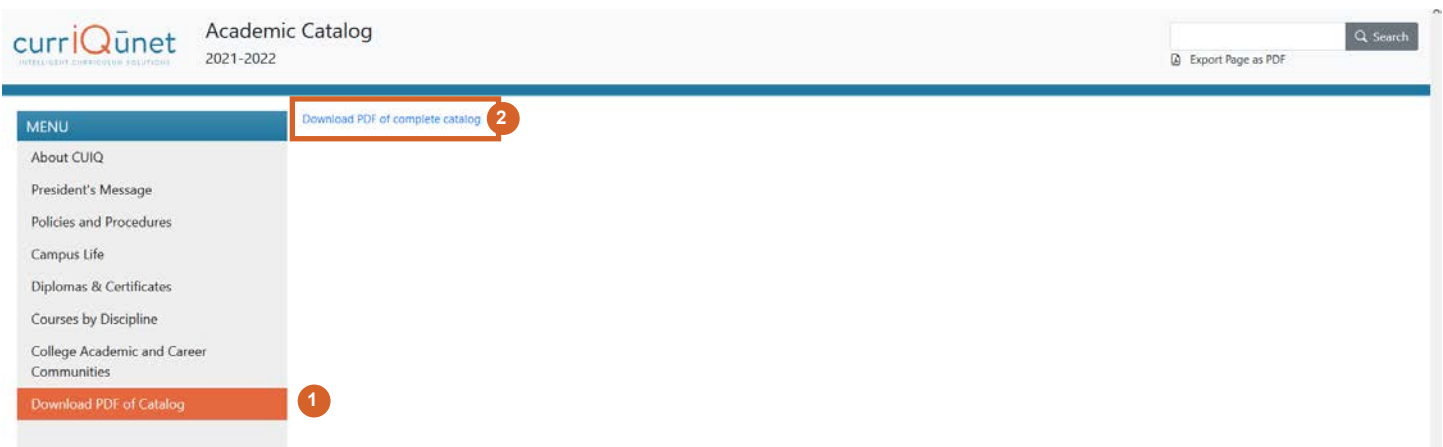
The PDF will download in the browser, and when clicked, will open in the browser. The number of pages is shown at the top. The PDF can be downloaded to your local device and can be printed.



# View the Catalog - continued

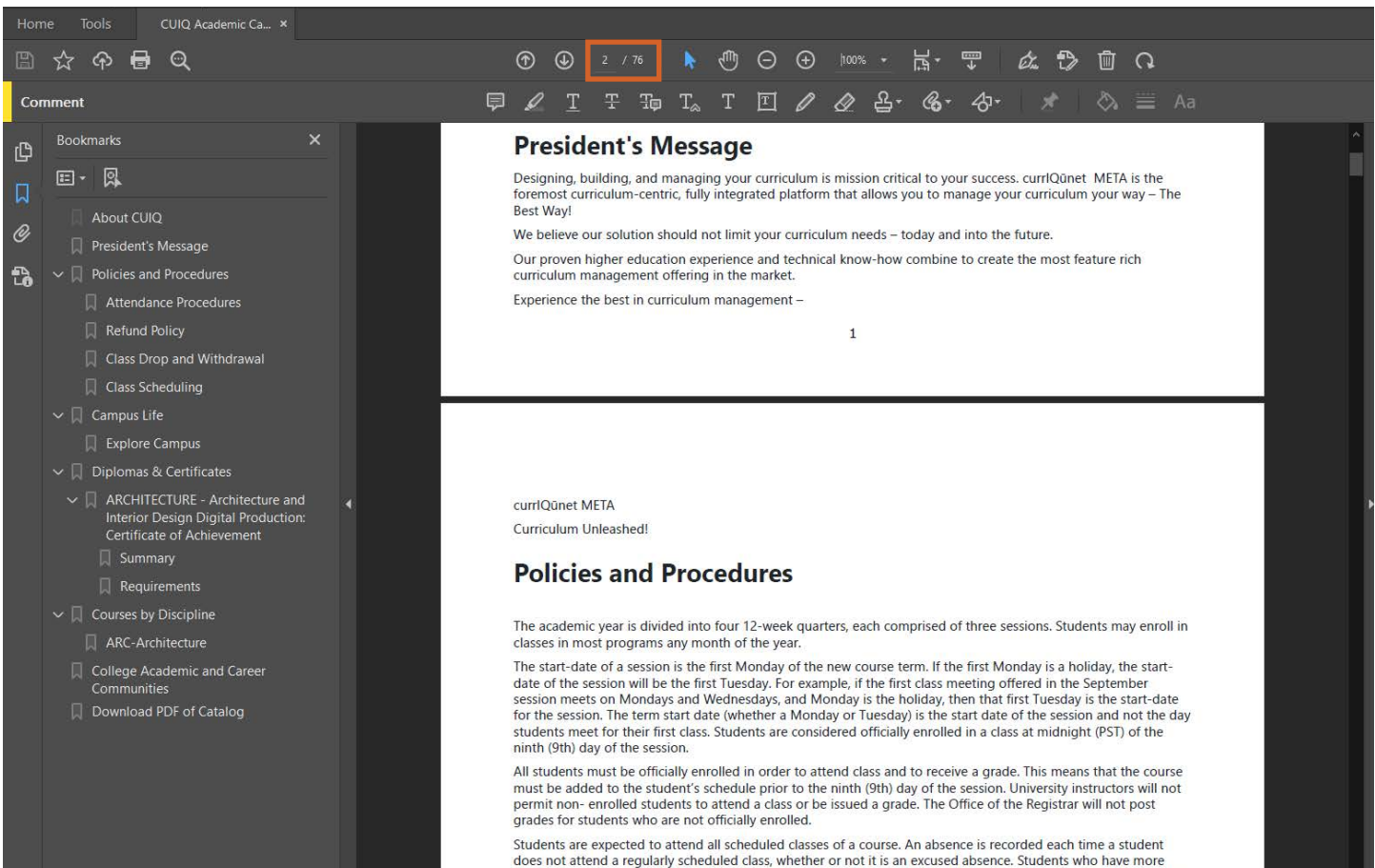
## Export Page as PDF/Download Entire Catalog - continued

Many institutions have an option to download the entire catalog as a PDF. This option will generally be on a specific page.



➤ Navigate to the correct page (1). Your institution's catalog download page may have a different name. Click the link (2) to download the entire catalog. It may take several minutes for the catalog to download in your browser because of the size of the file.

The PDF will download in the browser, and when clicked, will open in the browser. The number of pages is shown at the top. The PDF of the entire catalog can be downloaded to your local device and can be printed.

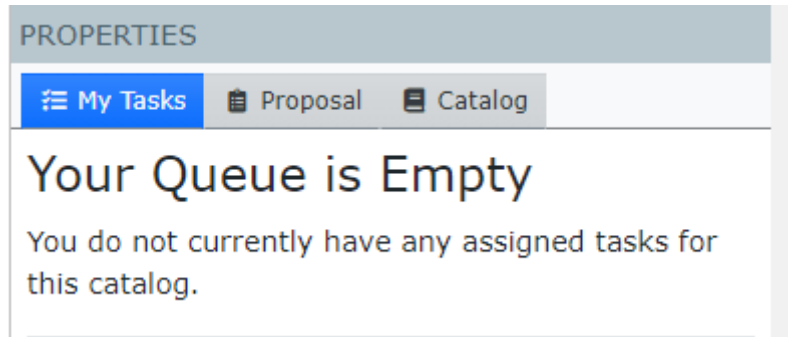


## Properties

The **Properties** sidebar has three tabs: **My Tasks**, **Proposal**, and **Catalog**.

### My Tasks

The **My Tasks** tab shows a logged-in user any tasks that have been assigned to them for the selected catalog. When there are currently no tasks assigned to the user for the selected catalog, the queue will show as empty (see below).



When there are one or more tasks assigned to the user (e.g. review or approval is needed for a catalog or section of a catalog), those tasks will be listed in the tab.

## Properties - continued

### Proposal

The **Proposal** tab allows you to select a certain catalog to view or edit. It also allows you to **modify** an existing active catalog (see pp. 68-71) or to **create** a new catalog (see pp. 17-20).

The grayed-out fields cannot be edited unless you are in **Edit Mode** (see pp. 15-16).

PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

Select Catalog

CUIQ Academic Catalog 2021-2022 (Active) ▼

Proposal Title

CUIQ Academic Catalog 2021-2022

Description

Description

Department

Administration ▼

Discipline

Academic Catalog ▼

Originator

CurriQunet SupportAdmin ▼

Modify This Catalog

Create a New Catalog

## Properties - continued

### Catalog

The **Catalog** tab shows the Catalog Title (note that this is different from the Proposal Title), subtitle, footer, and start and end date for the catalog. The grayed-out fields cannot be edited unless you are in **Edit Mode** (see next page).

PROPERTIES

My Tasks Proposal Catalog

### Catalog Properties

Catalog Title

Academic Catalog

Catalog Sub Title

2021-2022

Catalog Footer

CUIQ Academic Catalog

Catalog Start Date

09 / 01 / 2021

Catalog End Date

mm / dd / yyyy

Below is an example of the difference between the **Catalog Title** (something everyone will see when they access the current catalog) and the **Proposal Title** (something only logged-in users can see).

The **Proposal Title** (1) is shown in the gray bar at the top of the page, indicating which *version* of the catalog (i.e. which catalog proposal) is being viewed. This could be an active proposal, a historical proposal, or a draft or in review proposal.

The **Catalog Title** (2), the name of the catalog itself, is shown a little farther down. The **subtitle** (3) is beneath it and in this example indicates which school year this particular version of the catalog is for.

CUIQ Academic Catalog 2021-2022 (Active) 1

curriQūnet INTELLIGENT CURRICULUM SOLUTIONS

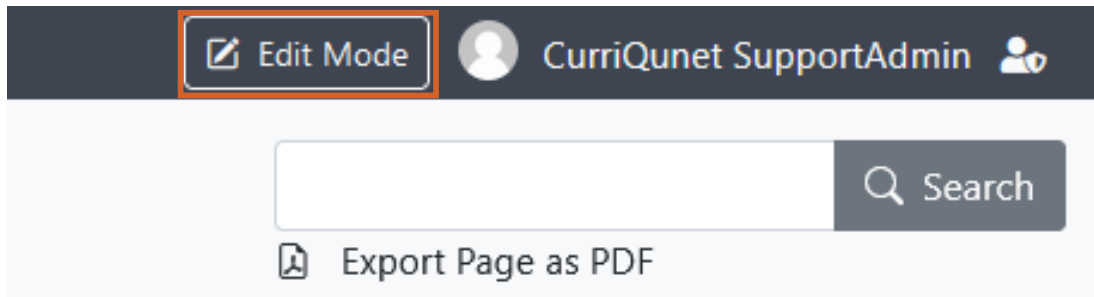
Academic Catalog 2

2021-2022 3

## Edit Mode

There are two modes in the new catalog: **View Mode**, which is the default setting and allows users to view but not edit, and **Edit Mode**, which allows users to view and edit. **Edit Mode** must be activated in order to add content or make any changes.

Any time the browser is refreshed while in Edit Mode, the entire catalog will default to View Mode, and Edit Mode must be activated again in order to continue adding content or making changes.



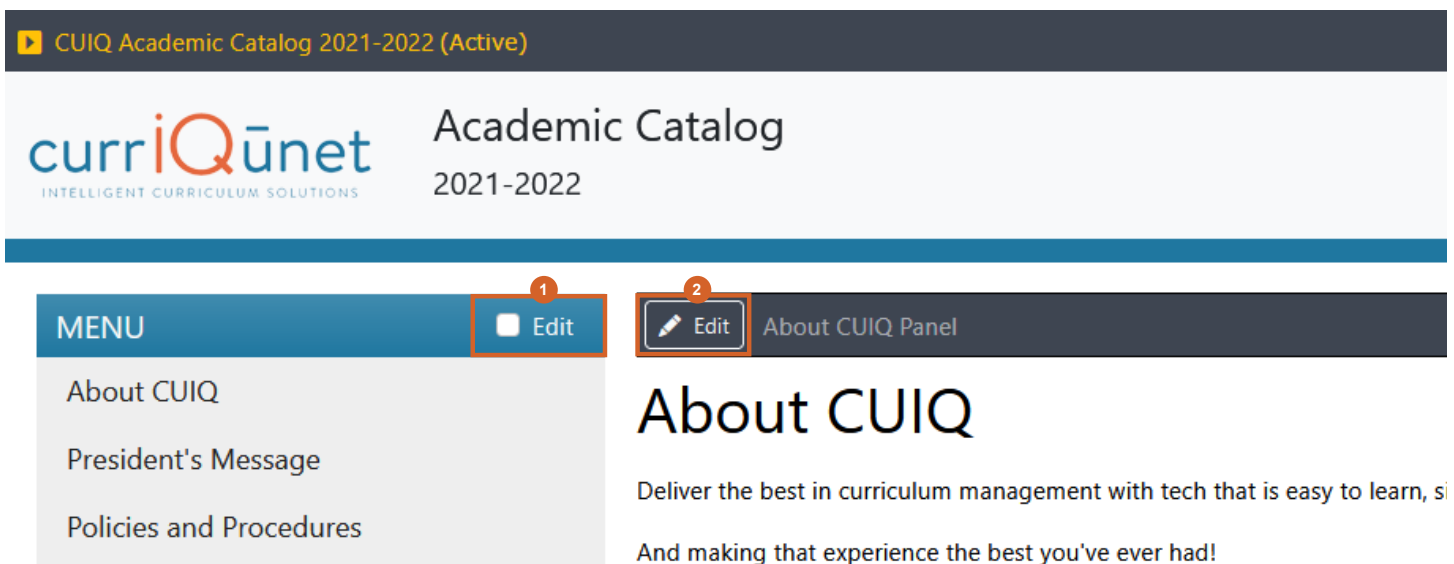
➤ *To activate Edit Mode for the catalog, click the Edit Mode button at the very top of the screen next to your profile picture and name. To deactivate Edit Mode for the catalog and return to View Mode, click the Edit Mode button again or refresh your browser.*

To access **Edit Mode** for the menu or pages, Edit Mode must be activated for the entire catalog and then individually activated for the menu and/or pages.

An **Edit checkbox** (1) will appear in the **Menu** on the far left side, which when checked will activate Edit Mode for the menu and allow you to add new pages and/or edit page titles. Unchecking the box will deactivate Edit Mode for the menu.

If any pages exist, an **Edit button** (2) will also appear within each page. Clicking this button within a page will activate Edit Mode for all pages and allow you to add new content to pages and/or edit any existing content. Clicking the button again on a page will deactivate Edit Mode for all pages.

When **Edit Mode** is deactivated for the catalog or the browser is refreshed, the entire catalog will revert to **View Mode** and the **Edit buttons** and **Edit checkbox** will disappear from the pages and menu until catalog Edit Mode is activated again.



▶ CUIQ Academic Catalog 2021-2022 (Active)

curriQunet  
INTELLIGENT CURRICULUM SOLUTIONS

Academic Catalog  
2021-2022

MENU

- About CUIQ
- President's Message
- Policies and Procedures

Edit

About CUIQ Panel

## About CUIQ

Deliver the best in curriculum management with tech that is easy to learn, s

And making that experience the best you've ever had!

## Edit Mode - continued

While in Edit Mode, the **Proposal** and **Catalog** tabs in the Properties sidebar no longer have grayed-out fields; all fields can be edited.

PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

Select Catalog

Proposal Title

Description

Division

Department

Originator

[Modify This Catalog](#)

[Create a New Catalog](#)

PROPERTIES

My Tasks Proposal Catalog

### Catalog Properties

Catalog Title

Catalog Sub Title

Catalog Footer

Catalog Start Date

Catalog End Date

In the next section, we will discuss creating a new catalog and filling out these fields while using Edit Mode. Adding and editing pages and content will be discussed later in the guide.

## Create a New Catalog

A new catalog can be created from the **Properties** sidebar in the **Proposal** tab.

PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

Select Catalog

CUIQ Academic Catalog 2021-2022 (Active) ▼

Proposal Title

CUIQ Academic Catalog 2021-2022

Description

Description

Department

Administration ▼

Discipline

Academic Catalog ▼

Originator

CurriQunet SupportAdmin ▼

Modify This Catalog

Create a New Catalog

Click 'Create a New Catalog' to create a brand-new catalog proposal.

## Create a New Catalog - continued

Once a new catalog proposal is created by clicking 'Create a New Catalog', a new draft proposal will appear in the **Select Catalog** dropdown, with a default name of "null" (this can be changed in **Edit Mode**).

A new catalog proposal is completely empty until content is added. All fields in the Proposal and Catalog tabs are blank, and there are no pages. Fields can be edited and pages and content can be added in **Edit Mode**.

When you are in a draft catalog proposal, the options at the bottom of the **Proposal** tab are now **Submit for Approval** (which launches the draft proposal into the workflow and should only be selected when the draft is completed) and **Delete This Draft** (which deletes the draft proposal without launching it).

The screenshot shows the 'Proposal Properties' form with the following fields and controls:

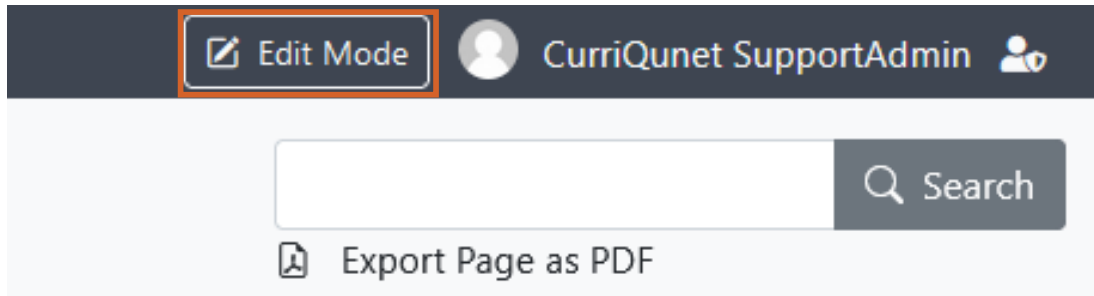
- Select Catalog:** A dropdown menu showing 'null (Draft)' with a downward arrow. This field is highlighted with a red box.
- Proposal Title:** A text input field containing 'Proposal Title'.
- Description:** A text area containing 'Description'.
- Division:** A dropdown menu.
- Department:** A dropdown menu.
- Originator:** A dropdown menu showing 'CurriQunet SupportAdmin'.
- Buttons:** At the bottom, there are two buttons: a blue 'Submit for Approval' button and a red 'Delete This Draft' button. Both buttons are highlighted with a red box.

At the top of the screen, the **Proposal Title** (1) is now showing as "null" and has a status of (Draft), indicating that this catalog is a brand-new draft proposal. The **Catalog Title** (2) and **subtitle** (3) are blank until they are edited in **Edit Mode**.

This close-up shows the top header area with three numbered callouts:

- 1:** Points to the 'null (Draft)' text in the top right corner.
- 2:** Points to a blank text input field on the right side.
- 3:** Points to a blank text input field below the one in callout 2.

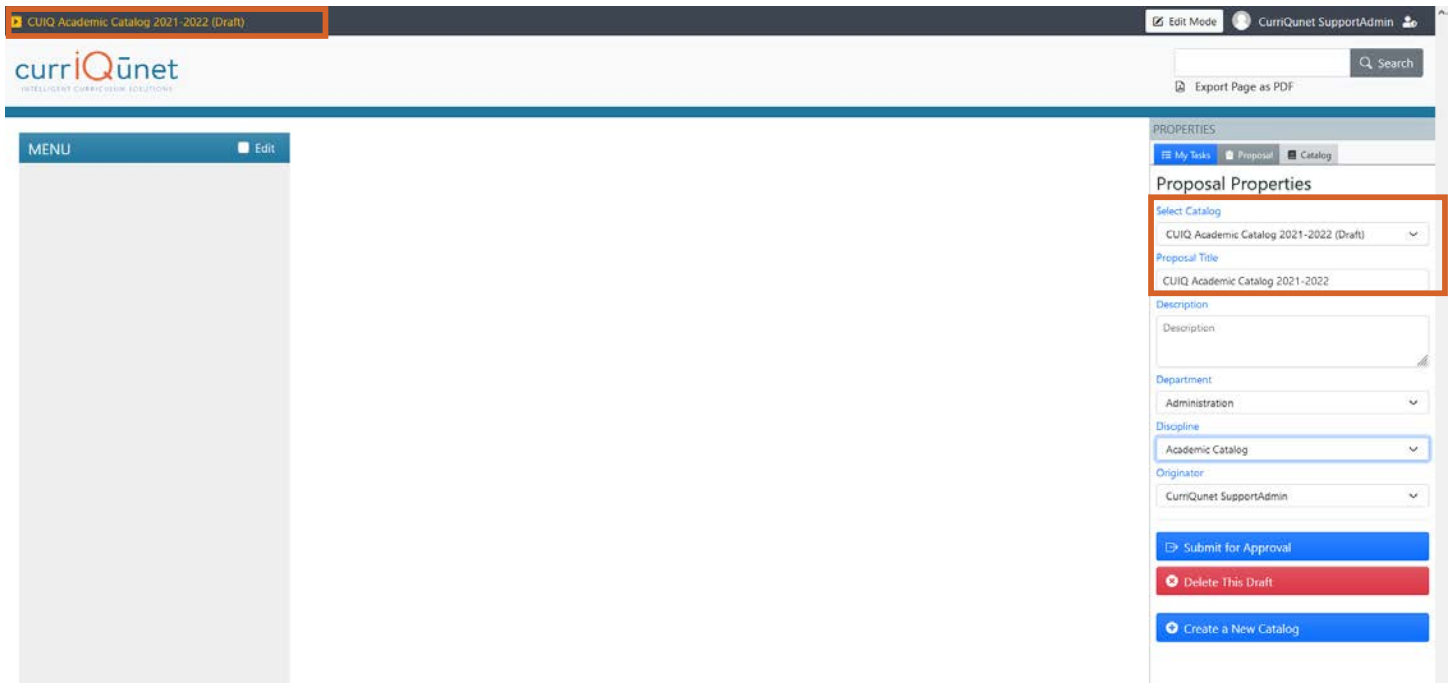
## Create a New Catalog - continued



➤ To activate *Edit Mode* for the catalog, click the *Edit Mode* button at the very top of the screen next to your profile picture and name.

Once you are in **Edit Mode**, you can fill out the fields in the Proposal and Catalog tabs in the Properties sidebar.

When you have filled out the Proposal Title field and refreshed the page, the proposal name for your draft in the Select Catalog dropdown - and the gray bar - will update (see below).



➤ Fill out the fields and select from the dropdowns in the Proposal tab.

## Create a New Catalog - continued

When you have filled out the Catalog Title and Catalog Sub Title fields, the catalog name and subtitle will also update at the top (see below).

The screenshot displays the CurriQūnet interface for editing an academic catalog. The top navigation bar shows the title "Academic Catalog 2021-2022" in a box. The right sidebar contains the "Catalog Properties" section, also boxed, with fields for "Catalog Title" (Academic Catalog), "Catalog Sub Title" (2021-2022), "Catalog Footer" (CUIQ Academic Catalog), "Catalog Start Date" (09/01/2021), and "Catalog End Date" (mm/dd/yyyy). A "MENU" section is visible on the left.

 *Fill out the fields and select start and end dates in the Catalog tab.*

In the next section, we will discuss adding and editing pages in the main navigation **Menu**.

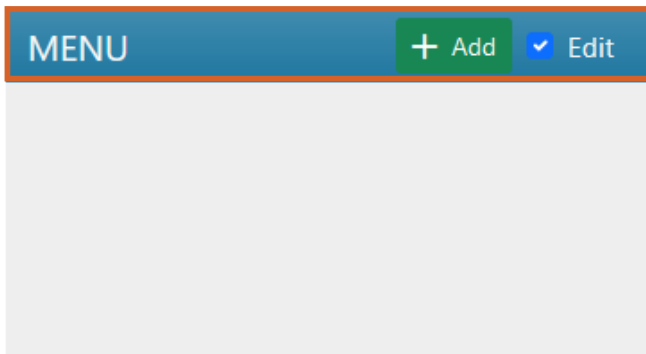
## Main Navigation (Menu)

The **Menu** is the navigation sidebar where pages in the catalog are added, edited, and accessed.

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

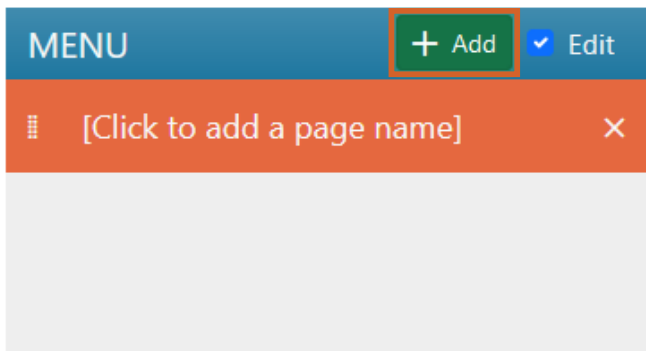


➤ When **Edit Mode** is activated for the catalog, click the **Edit checkbox** in the **Menu** to activate Edit Mode for the menu. An **'+Add'** button for adding pages will appear.

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022



➤ Click the **'+Add'** button to add a page. The page will be blank with placeholder text that says '[Click to add a page name]'.  
➤

## Main Navigation (Menu) - continued

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

MENU + Add ✓ Edit

About CUIQ

Click the page to edit the page title. Enter a name for the page. Add and name as many pages as necessary.

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

MENU + Add ✓ Edit

- President's Message ×
- Policies and Procedures ×
- Campus Life ×
- Diplomas & Certificates ×
- Courses by Discipline ×
- About CUIQ ×

Edit About CUIQ Panel

To move a page up or down the list, hold the drag button () and drag the page to a different spot in the list. To delete the page, press the X button next to the page name ()

## Main Navigation (Menu) - continued

When the **Edit checkbox** in the menu is unchecked, Edit Mode for the menu will be deactivated and the **'+Add'** button will disappear along with the ability to edit page titles or to drag or delete pages.

The Edit checkbox can be checked at any time while in catalog Edit Mode to make changes to the order of the pages or to their titles, or to delete or add more pages.

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

MENU

Edit



Edit

About CUIQ Panel

About CUIQ

President's Message

Policies and Procedures

Campus Life

Diplomas & Certificates

Courses by Discipline

College Academic and Career  
Communities

In the next section, we will discuss adding different types of content to pages.

## Adding Content to Pages

To add content to an empty page, make sure **Edit Mode** is enabled for the catalog and that the **Edit checkbox** at the top of the **Menu** is *unchecked*. (When the box is checked, clicking on a page in the menu will give you the ability to edit the page title. When the box is unchecked, clicking on a page in the menu will navigate you to that page in the catalog.)

▶ CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

MENU  Edit

- About CUIQ 1
- President's Message
- Policies and Procedures
- Campus Life

Edit 2 About CUIQ Panel

Click on a page in the menu to navigate to it (1). When you are at the correct page, click the **Edit button** at the top of the page panel (2).

# Adding Content to Pages

## Creating a Page with a Heading and Formatted Text

When the **Edit** button on the page panel is clicked, a **Body content panel** will appear by default on the page. (See **Terminology** on pp. 3-5 for definitions of content panels and content types.)

CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022



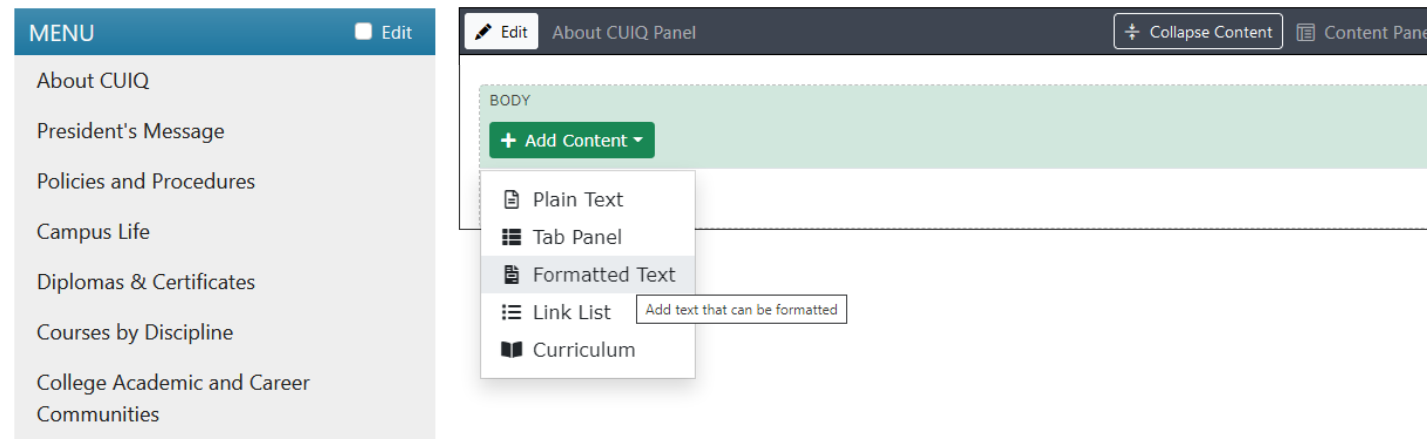
Click the '+Add Content' button in the **Body** panel to add a content type.

The '+Add Content' button has a dropdown containing content types that can be added to the panel. Hovering over each content type with your mouse will cause a tooltip to appear explaining what the content type is for (see below).

CUIQ Academic Catalog 2021-2022 (Draft)



Academic Catalog  
2021-2022

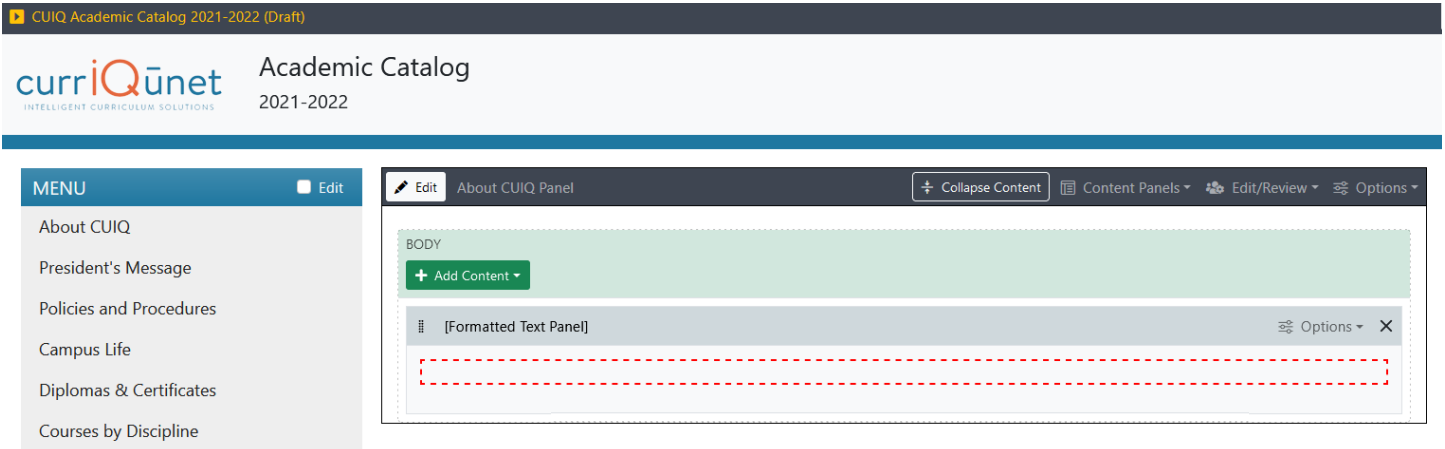


Click on a content type in the dropdown to add it. For this example, we'll be adding a **Formatted Text** panel.

# Adding Content to Pages - continued

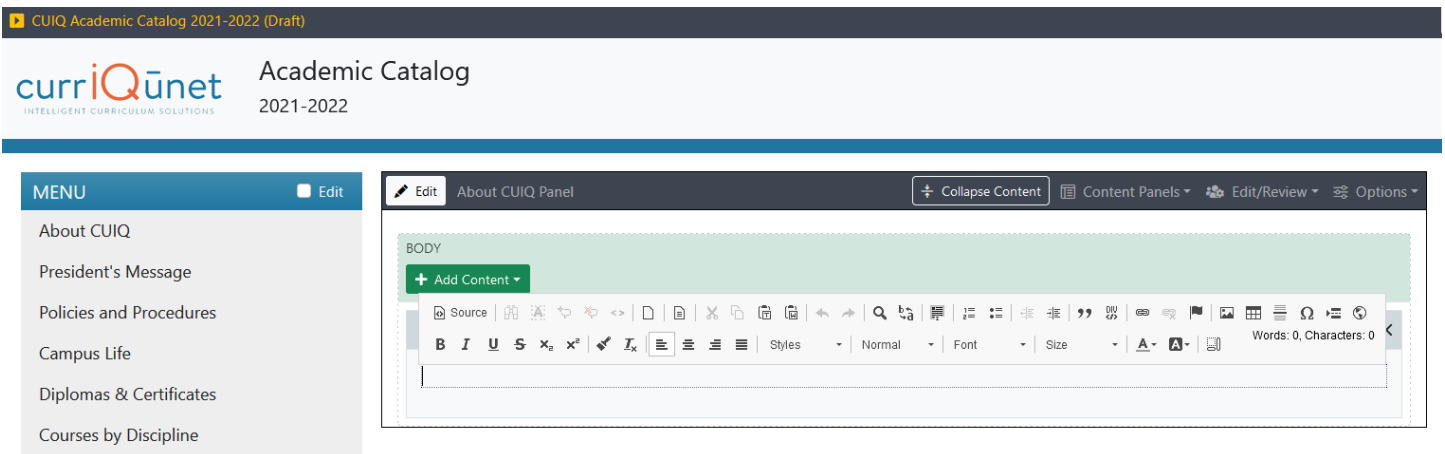
## Creating a Page with a Heading and Formatted Text - continued

This is how a **formatted text** panel will initially appear when added to the **Body** panel (or any other content panel).



Click inside the red dotted line to add text.

When you click inside the formatted text panel, a menu with several different formatting options and tools will appear above the cursor.

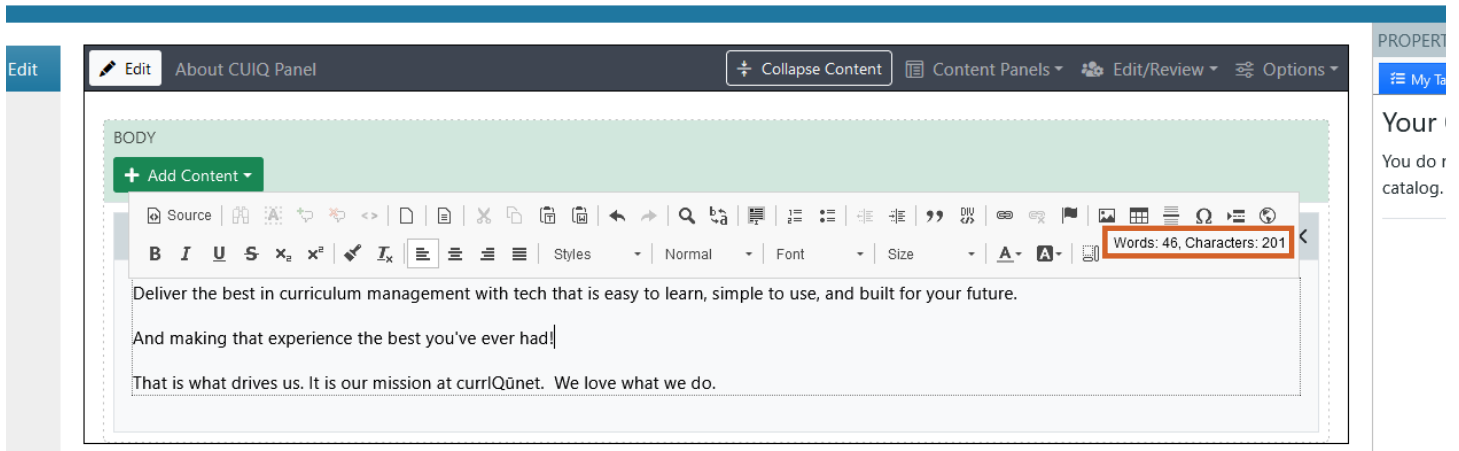


Type the desired text and format as needed using the tools in the menu.

## Adding Content to Pages - continued

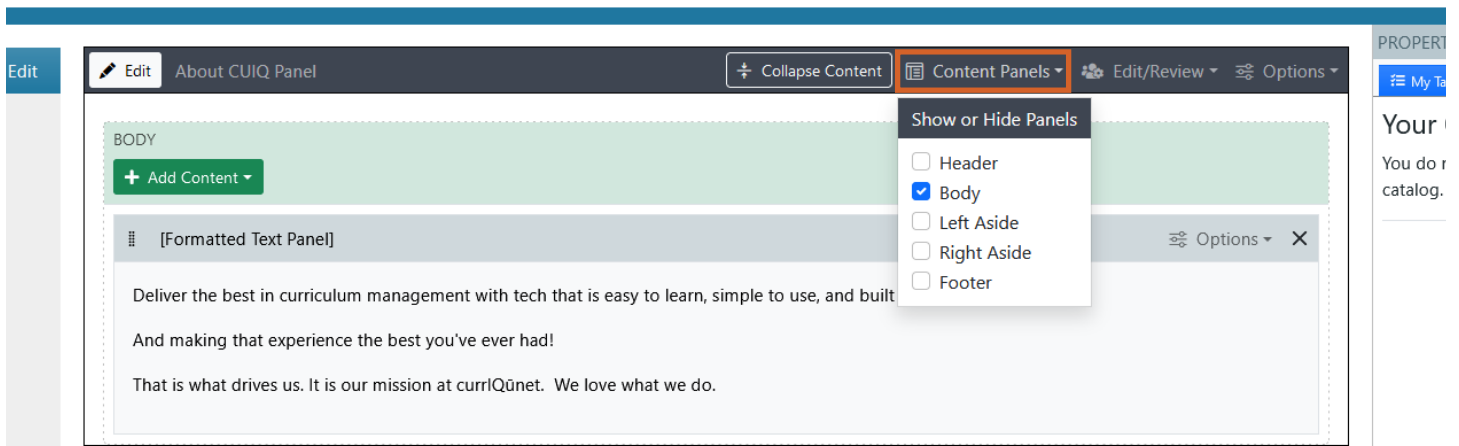
### Creating a Page with a Heading and Formatted Text - continued

As you type, you will see a **Word and Character count** in the menu above your text.



The screenshot shows the CUIQ Panel editor interface. At the top, there is a toolbar with buttons for 'Edit', 'Collapse Content', 'Content Panels', 'Edit/Review', and 'Options'. Below the toolbar is a green 'BODY' content panel with an 'Add Content' button. A rich text editor toolbar is visible, containing various formatting options like bold, italic, underline, strikethrough, subscript, superscript, link, unlink, bulleted list, numbered list, indent, outdent, text color, and background color. A status bar at the bottom right of the editor shows 'Words: 46, Characters: 201'. The text in the editor reads: 'Deliver the best in curriculum management with tech that is easy to learn, simple to use, and built for your future. And making that experience the best you've ever had! That is what drives us. It is our mission at curriQūnet. We love what we do.'

More content panels can be accessed by clicking **Content Panels** at the top of the page you are editing, which will give you the option to show or hide each content panel by checking or unchecking the checkbox next to each panel type.



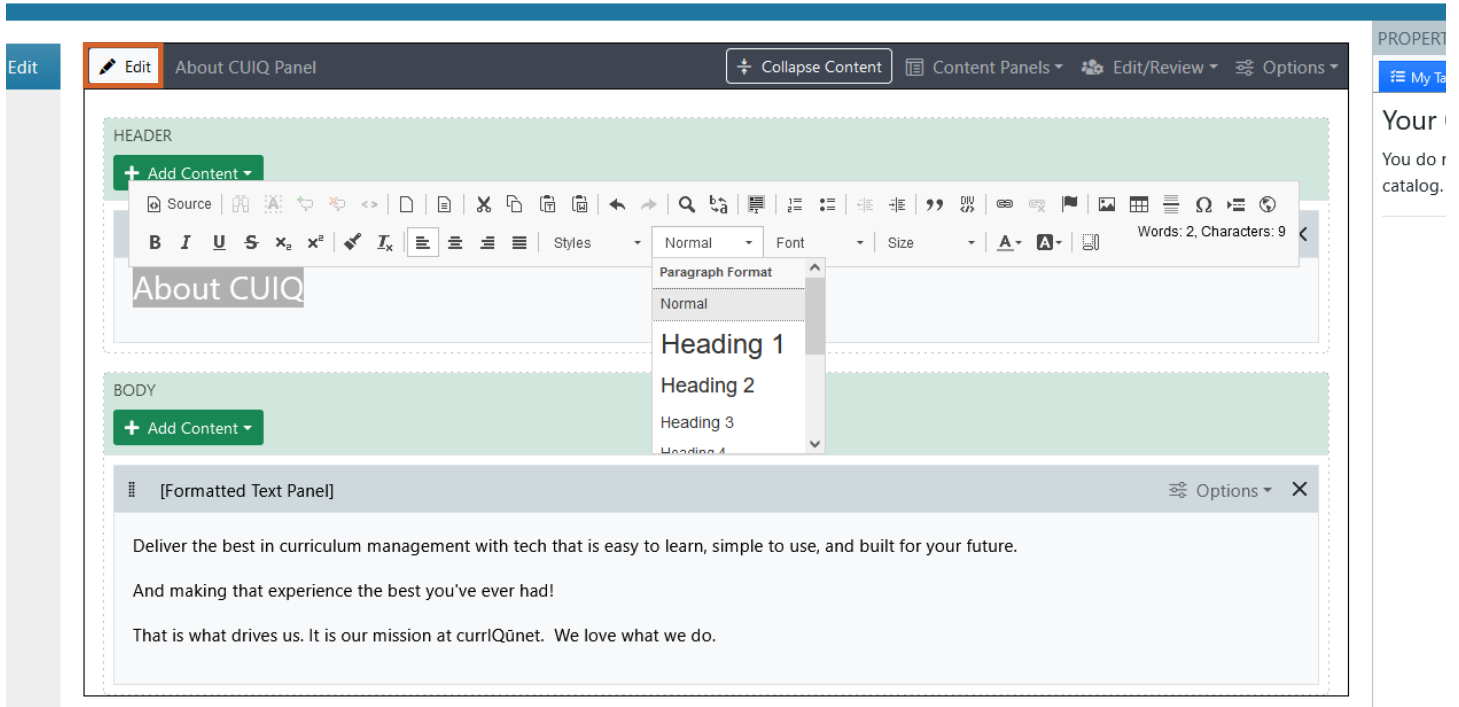
The screenshot shows the CUIQ Panel editor interface with the 'Content Panels' dropdown menu open. The dropdown menu is titled 'Show or Hide Panels' and contains the following options: 'Header' (unchecked), 'Body' (checked), 'Left Aside' (unchecked), 'Right Aside' (unchecked), and 'Footer' (unchecked). The main editor area shows the same text as the previous screenshot, but with a grey bar at the top of the content area labeled '[Formatted Text Panel]'. The 'Content Panels' button in the top toolbar is highlighted with a red box.

Click on **Content Panels** to show the dropdown containing all content panel types. Check or uncheck boxes next to each panel type to show or hide panels.

## Adding Content to Pages - continued

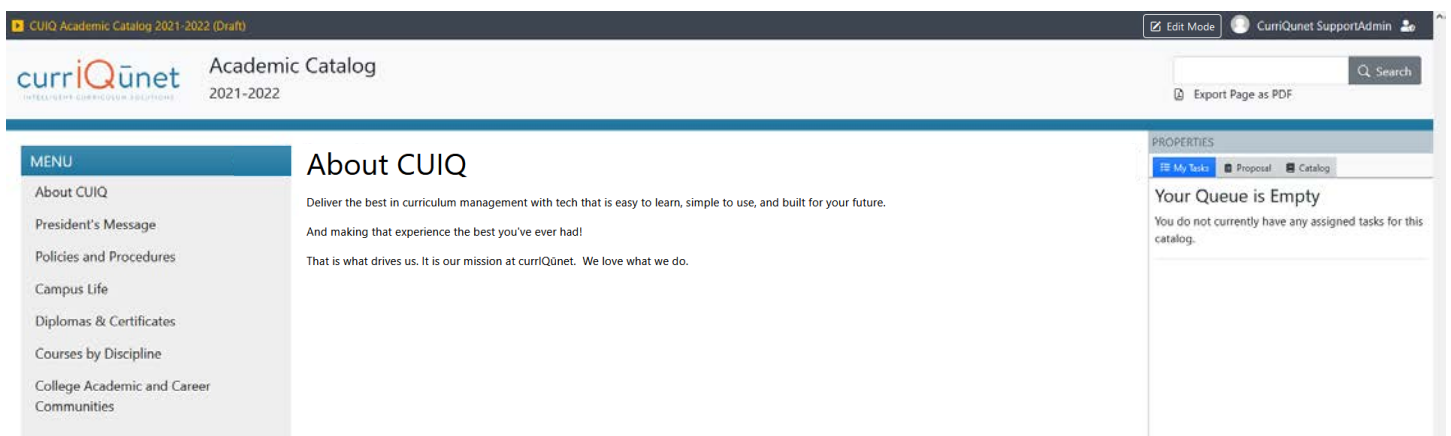
### Creating a Page with a Heading and Formatted Text - continued

In the below example, we've shown the **Header content panel** on the page and added a **formatted text panel** to it with some header text. The Header content panel always shows above the Body content panel.



 *Type the desired text and format as needed using the tools in the formatted text menu. To exit out of Edit Mode for the page and to view what the finished page will look like, click the **Edit** button at the top of the page.*

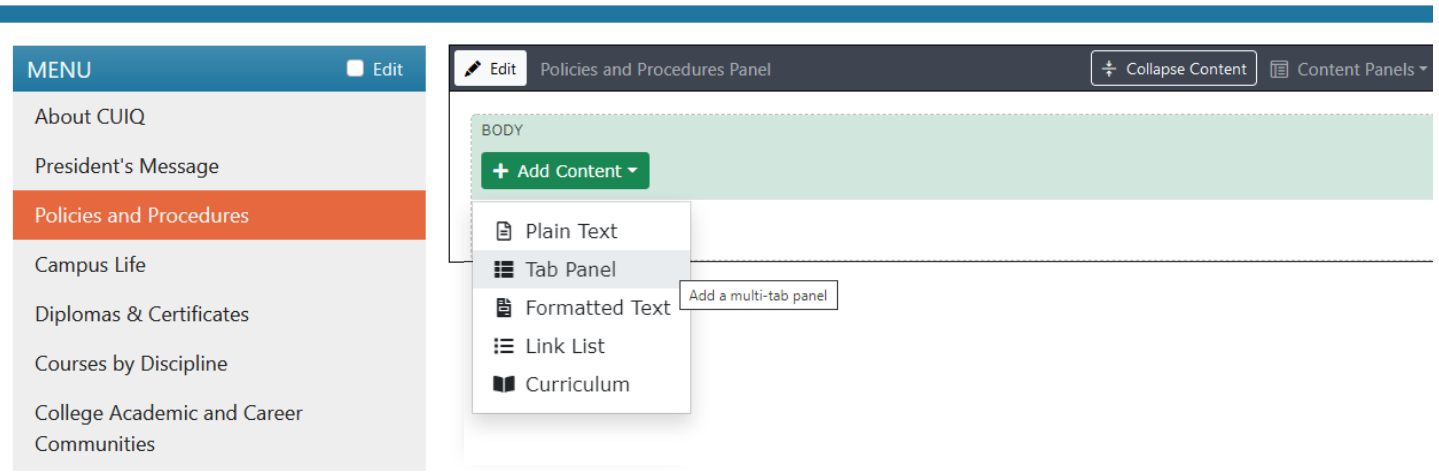
After exiting out of Edit Mode, the page will look like the following:



# Adding Content to Pages - continued

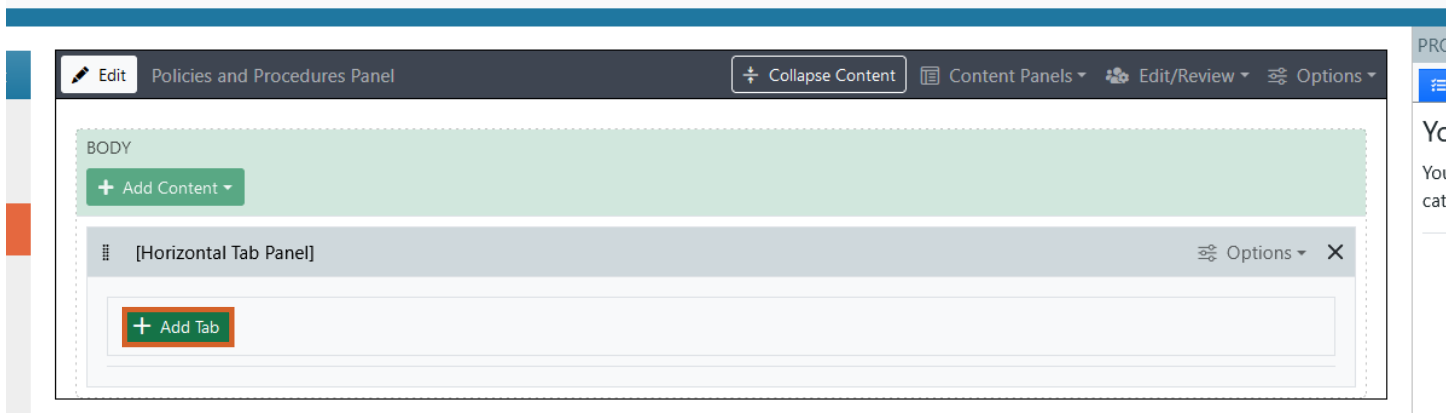
## Creating a Tabbed Page

In this example, we will add a **Tab Panel** content type to a **Body content panel**.



Click the '+Add Content' button in the **Body** panel to add a content type. Click on a content type in the dropdown to add it. For this example, we'll be adding a **Tab Panel**.

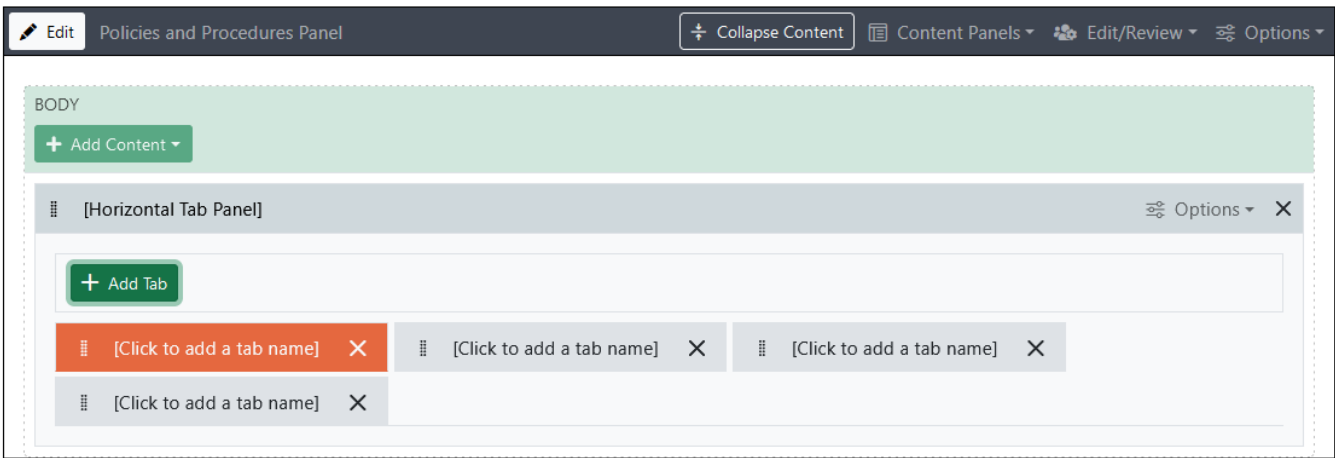
Once a **Tab Panel** content type is added to a content panel, no other content types can be added to that content panel. (See the below example - once the Tab Panel has been added, the '+Add Content' button in the **Body content panel** is no longer clickable.)



Click the '+Add Tab' button in the **Body** panel to add a tab to the Tab Panel. You may add multiple tabs.

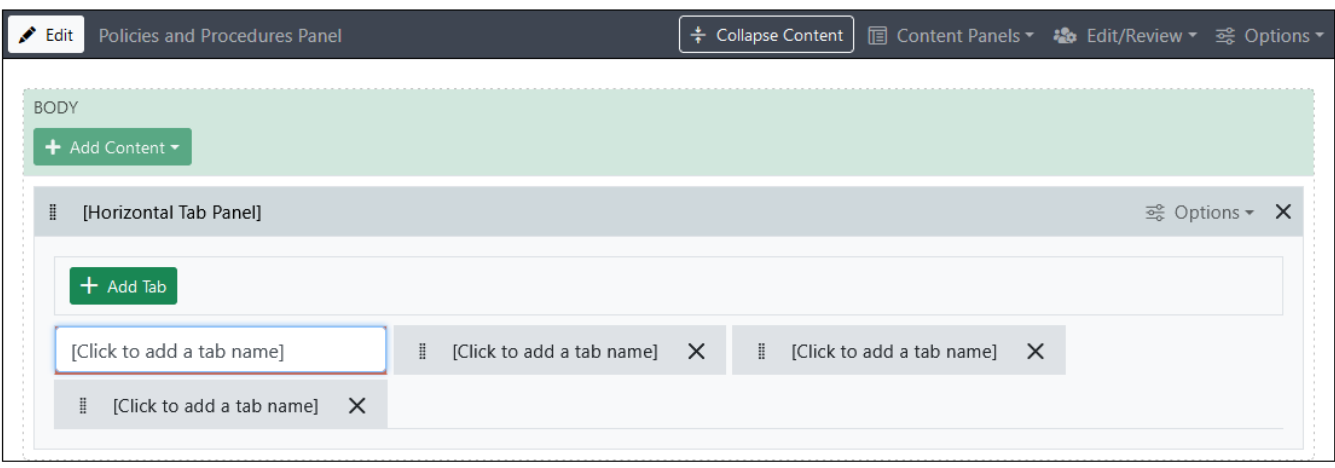
## Adding Content to Pages - continued

### Creating a Tabbed Page - continued



The screenshot shows a web editor interface for a "Policies and Procedures Panel". At the top, there is an "Edit" button, a "Collapse Content" button, and a "Content Panels" dropdown menu. Below this is a "BODY" section with an "Add Content" button. The main content area is a "[Horizontal Tab Panel]" with an "Add Tab" button and four tabs. Each tab has a placeholder text "[Click to add a tab name]" and a close button. The first tab is highlighted in orange.

 The tab(s) will be blank with placeholder text that says '[Click to add a tab name]'. Click a tab to edit the tab title.



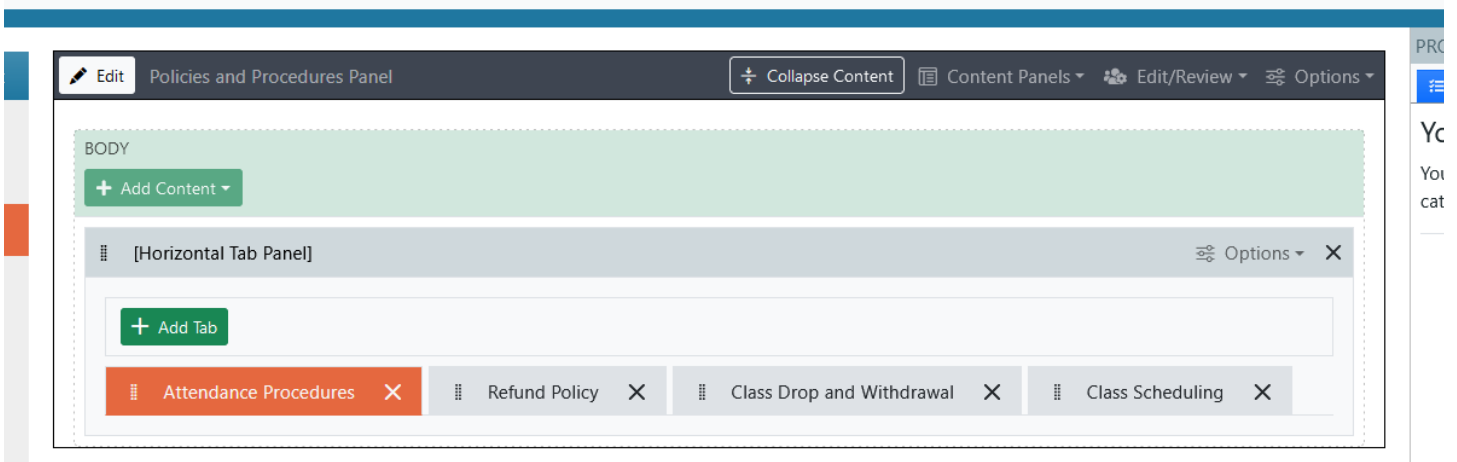
The screenshot shows the same web editor interface. The first tab is now named "Click to add a tab name" and is highlighted with a blue border. The other three tabs remain blank with the placeholder text.

 Enter a name for each tab.

 **NOTE:** All tabs must be named in order to display properly on a page. If a tab is not named, it will display on the page as 'Invalid Tab'.

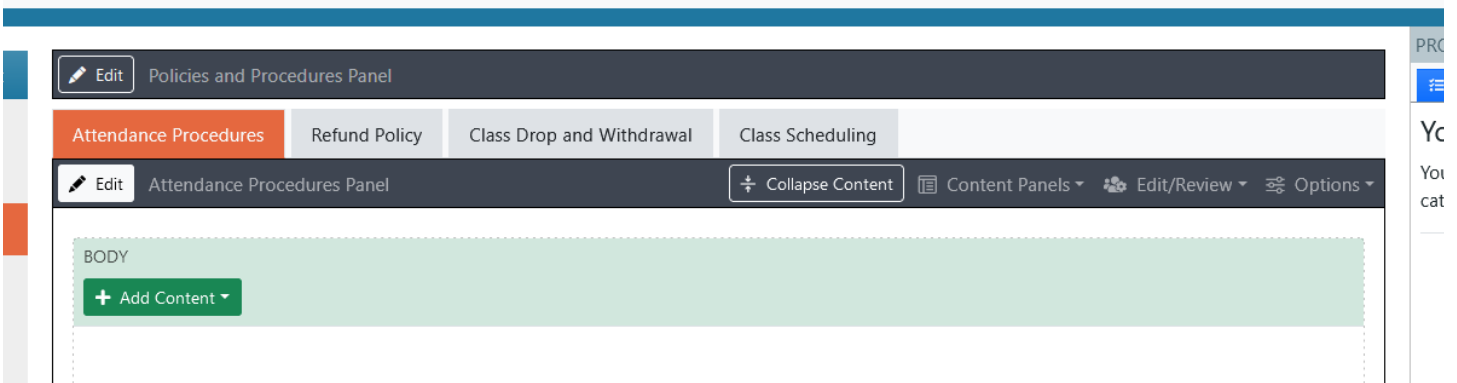
## Adding Content to Pages - continued

### Creating a Tabbed Page - continued



➤ To move a tab to a different position, hold the drag button (☰) and drag the page to a different spot in the list. To delete the tab, press the X button next to the tab name (✕).

Each tab functions as a nested page, and content panels and types can be shown and added to tabs just as with normal pages. **Edit Mode** must be individually activated for each tab in order to add or edit content within the tabs.



➤ Click on a tab and activate **Edit Mode** for the tab page. Just as with a normal page, a Body content panel will appear. Click **+Add Content!**.

## Adding Content to Pages - continued

### Creating a Tabbed Page - continued

In the below example, a formatted text panel has been added to the 'Attendance Procedures' tab.

The screenshot displays a web editor interface for a tabbed page. The top navigation bar includes an 'Edit' button, the page title 'Attendance Procedures Panel', and several utility buttons: 'Collapse Content', 'Content Panels', 'Edit/Review', and 'Options'. Below the navigation bar is a green 'BODY' header with a '+ Add Content' button. A rich text editor toolbar is visible, featuring icons for source, undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, quote, insert, table, and other standard editing functions. The main content area contains six paragraphs of text regarding academic procedures, including session start dates, enrollment requirements, attendance expectations, and dispute resolution. The text is formatted with standard paragraph styling. On the right side of the editor, a status bar shows 'Words: 555, Characters: 2791'.

➤ *Add content panels and types to each tab the same way you would add content to a normal page. Additional content panels (such as a Header) can also be added to the parent page.*

# Adding Content to Pages - continued

## Creating a Tabbed Page - continued

After adding a heading to the page and exiting out of Edit Mode, the tabbed page will look like the following:

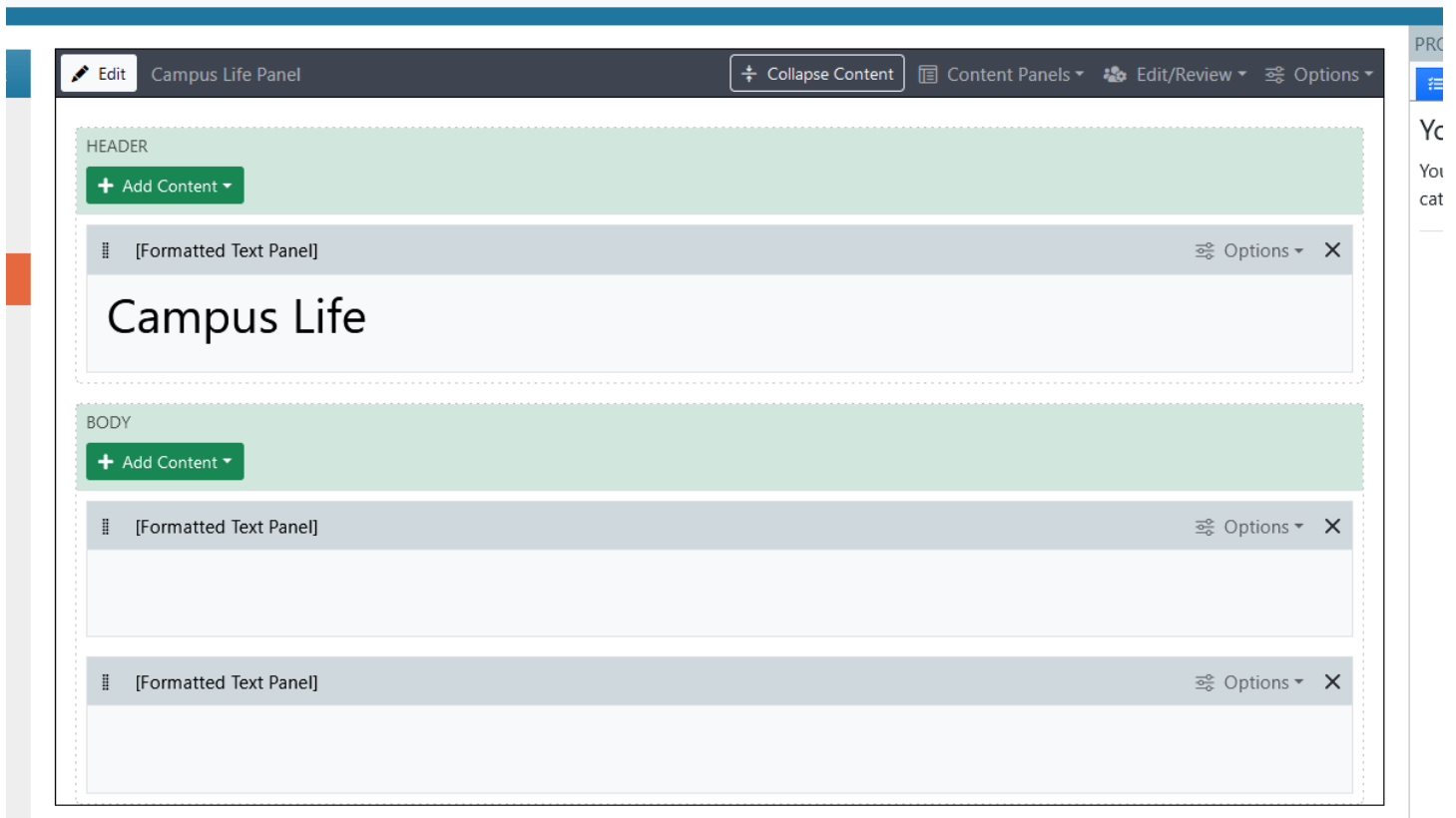
The screenshot displays the CurriQūnet Academic Catalog interface. At the top, there is a navigation bar with the site name, the current page title 'Academic Catalog 2021-2022', and user options like 'Edit Mode' and 'CurriQūnet SupportAdmin'. A search bar is also present. Below the navigation bar, a 'MENU' sidebar on the left lists various site sections. The main content area is titled 'Policies and Procedures' and features a tabbed interface with four tabs: 'Attendance Procedures' (which is the active tab), 'Refund Policy', 'Class Drop and Withdrawal', and 'Class Scheduling'. The 'Attendance Procedures' tab contains several paragraphs of text detailing academic policies. On the right side of the page, there is a 'PROPERTIES' panel with a 'My Tasks' section that says 'Your Queue is Empty'.

➡ *The default view on the page will be the first tab. Click on each tab to view the content in each of the tabs.*

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page

While smaller images may be pasted into a formatted text panel, larger images in the catalog should be linked from a URL. This can be done using the Image tool in a formatted text panel.

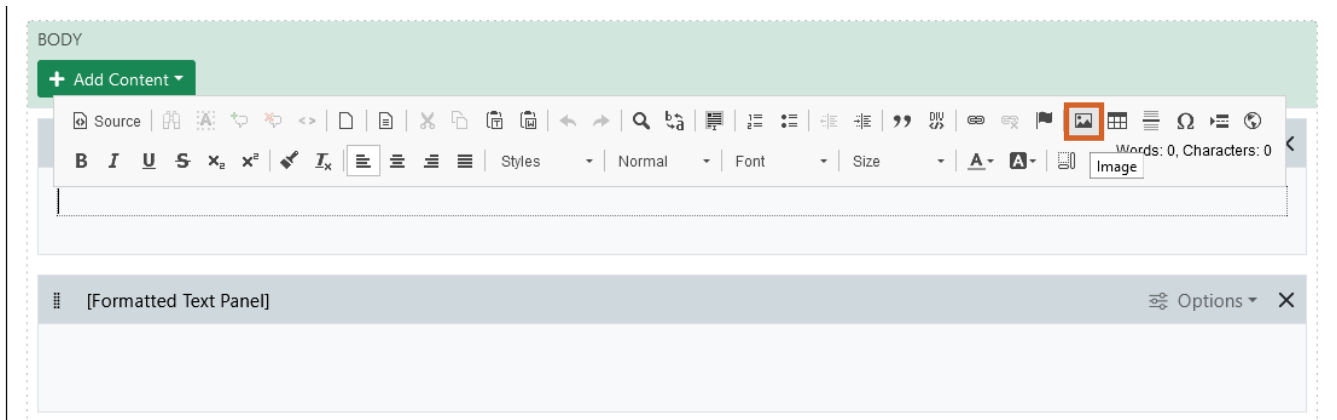


The screenshot shows a content editor interface for a 'Campus Life Panel'. At the top, there is a dark header bar with 'Edit Campus Life Panel', 'Collapse Content', 'Content Panels', 'Edit/Review', and 'Options' menus. Below this, the page is divided into a 'HEADER' section and a 'BODY' section. Each section has a green '+ Add Content' button. The 'HEADER' section contains a single 'Formatted Text Panel' with the text 'Campus Life' and an 'Options' menu. The 'BODY' section contains two 'Formatted Text Panel' elements, each with an 'Options' menu. A mouse cursor is pointing at the first 'Formatted Text Panel' in the body section.

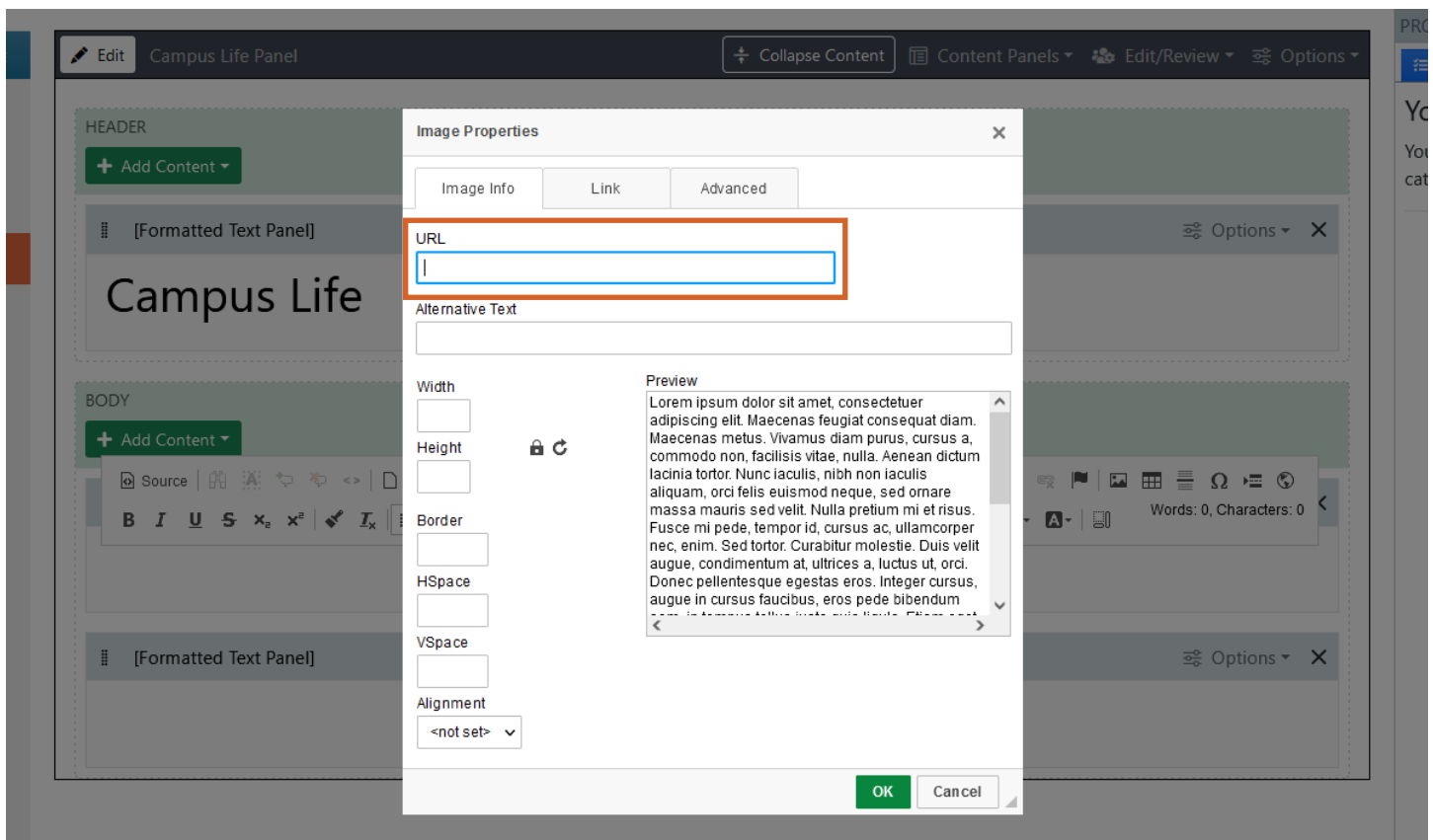
➡ Add one or more formatted text panels to a page. Click on one of the formatted text panels to bring up the tools and options menu.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued



Click on the **Image** tool to access the **Image Properties** manager.

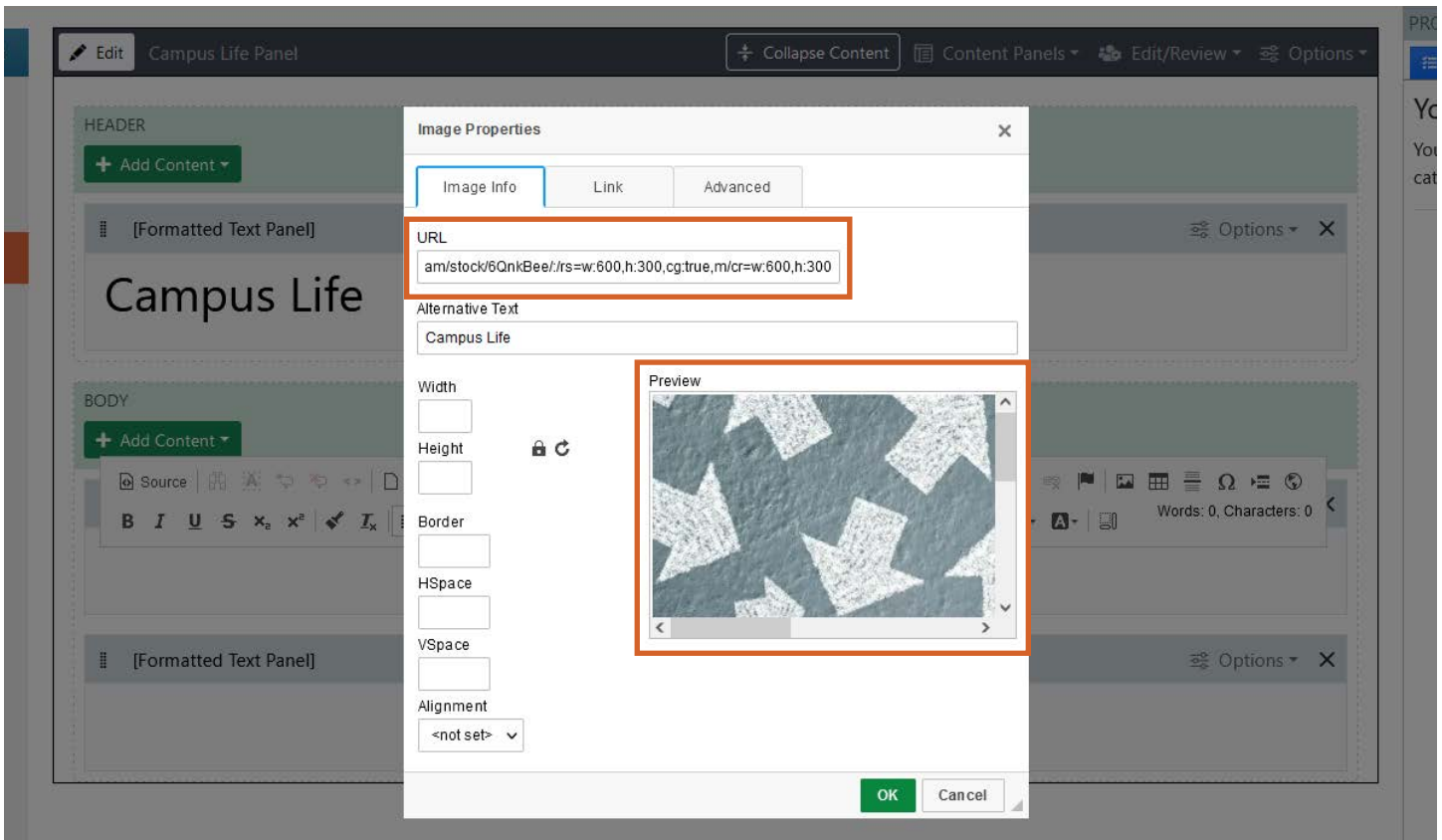




In the **Image Info** tab, type in the **URL** of the image you are linking to the page.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued

After you have typed the URL, a preview of the image will appear.

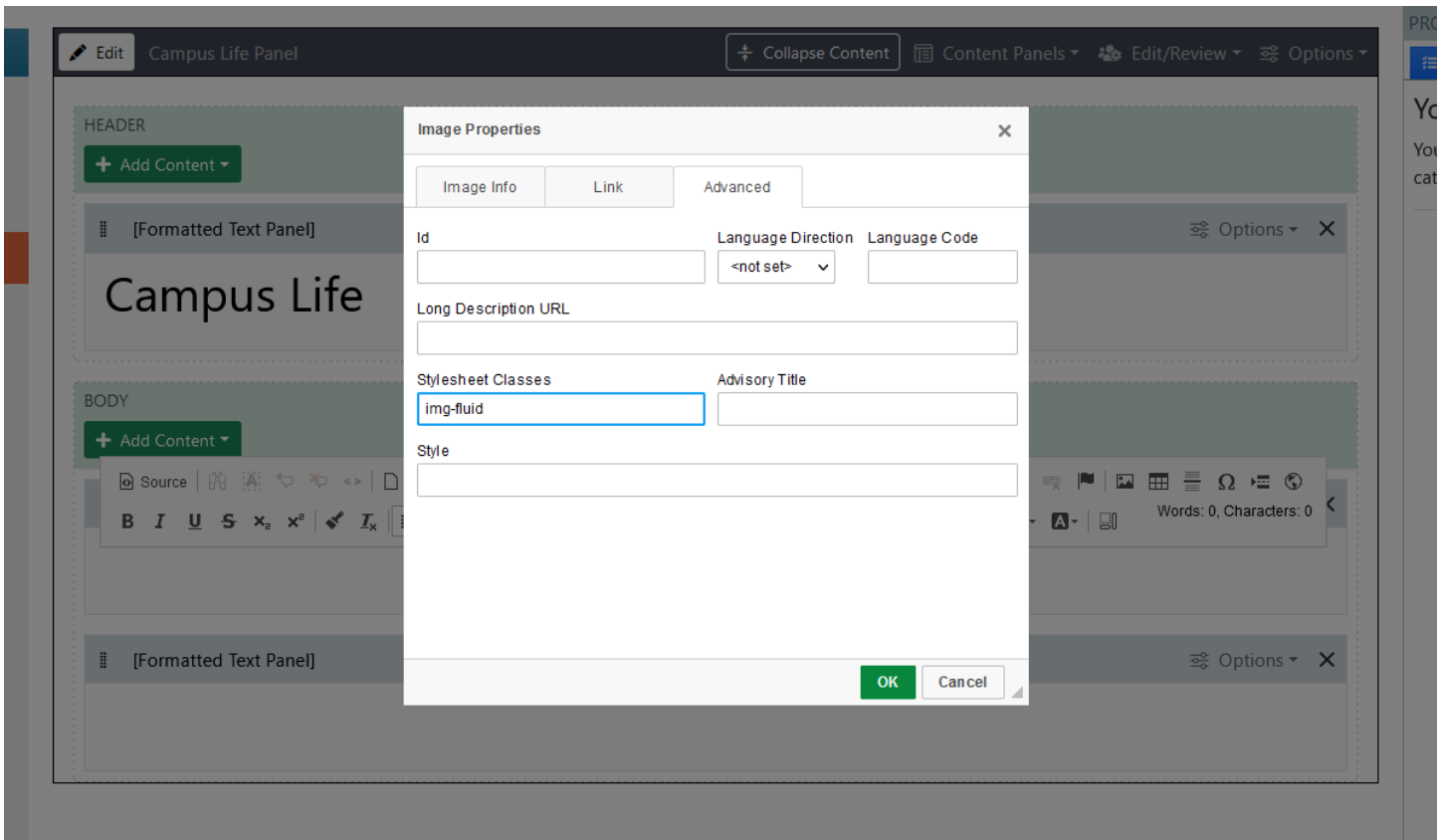


  *Make any necessary adjustments to the image using the Width, Height, Border, HSpace (horizontal space around the image), VSpace (vertical space around the image), and Alignment tools. Add alt text for screen readers in the Alternative Text textbox.*

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued

The Advanced Options can be used if you are familiar with HTML and CSS. In the below example, a stylesheet class has been added to the image.

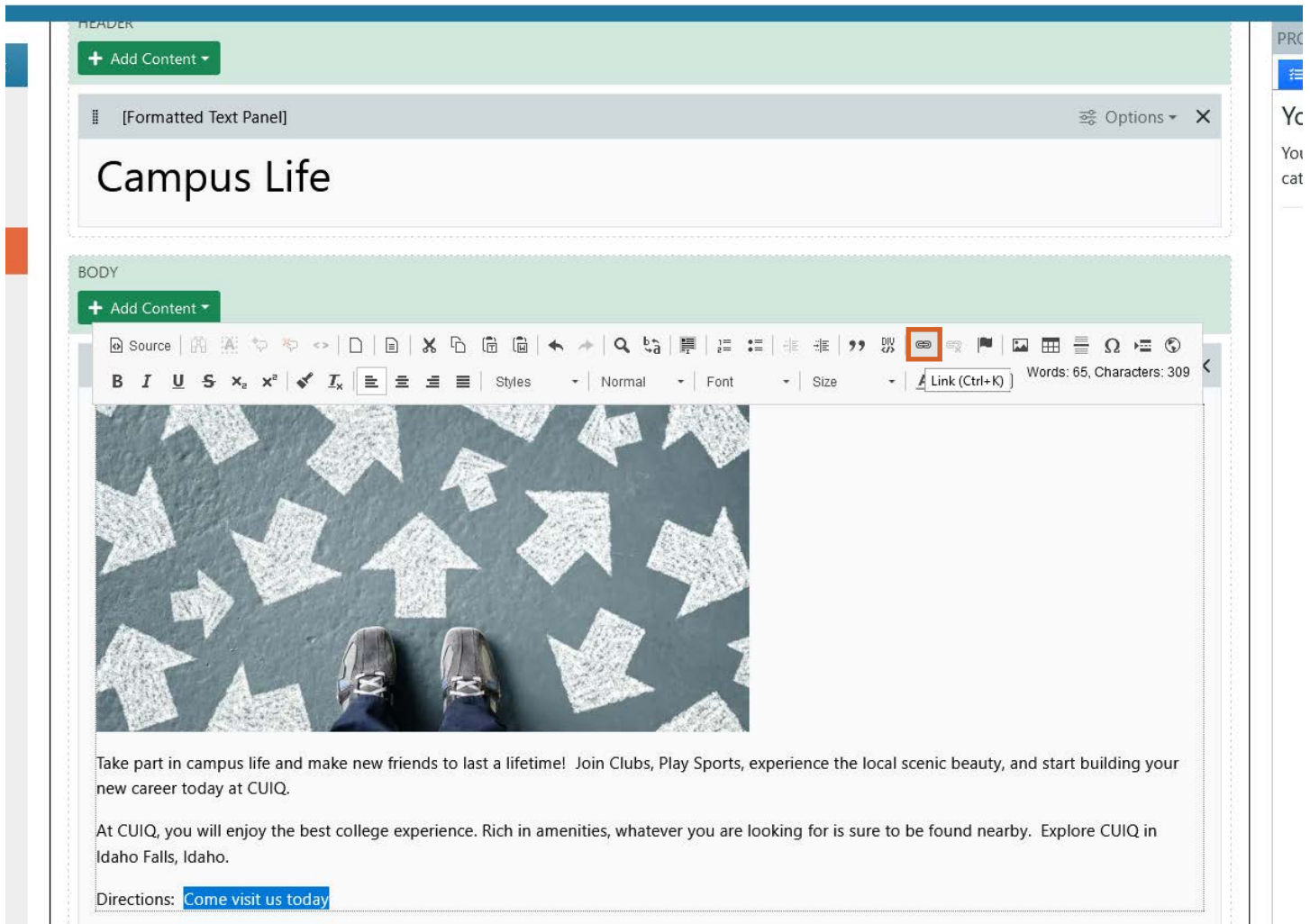


 Use the Advanced tab to add more specifications to the image.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued

A link can be added to the formatted text panel using the Link tool.



The screenshot shows a web editor interface. At the top, there is a 'HEADER' section with a '+ Add Content' button. Below it is a 'Formatted Text Panel' containing the title 'Campus Life'. The main content area is labeled 'BODY' and also has a '+ Add Content' button. A rich text editor toolbar is visible, with the 'Link' tool (represented by a chain link icon) highlighted with a red box. Below the toolbar is an image of a person's feet standing on a dark carpet with white arrows pointing in various directions. Underneath the image, there is text: 'Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ.' followed by 'At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho.' and 'Directions: [Come visit us today](#)'.

 Highlight the text you would like to turn into a link and click on the **Link** tool to access the **Link** manager.

## Adding Content to Pages - continued

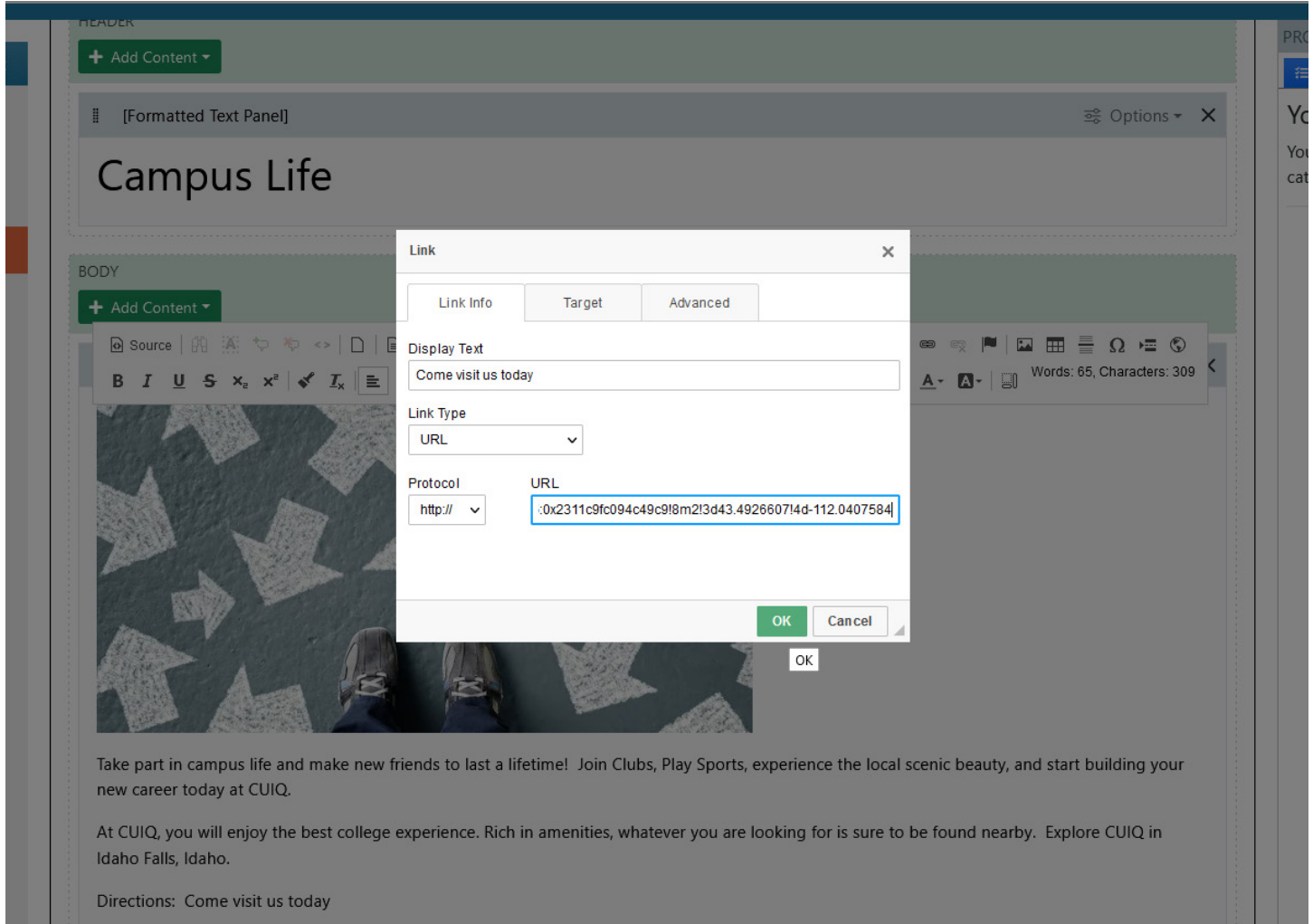
### Adding an Image, Link and Inline Frame to a Page - continued

The screenshot shows a web editor interface. At the top, there's a 'HEADER' section with a '+ Add Content' button. Below it is a '[Formatted Text Panel]' containing the text 'Campus Life'. The main content area is labeled 'BODY' and contains a large image of a patterned carpet. Below the image, there's text: 'Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ. At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho. Directions: Come visit us today'. A 'Link' dialog box is open in the center, with tabs for 'Link Info', 'Target', and 'Advanced'. The 'Link Info' tab is selected. It shows 'Display Text' as 'Come visit us today', 'Link Type' as 'URL', and 'Protocol' as 'http://'. The URL input field is highlighted with an orange border. The dialog has 'OK' and 'Cancel' buttons at the bottom.

 If you highlighted text before clicking on the **Link** tool, the **Display Text** will automatically populate. (You can also add or edit the Display Text.) Type the **URL** for the link.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued



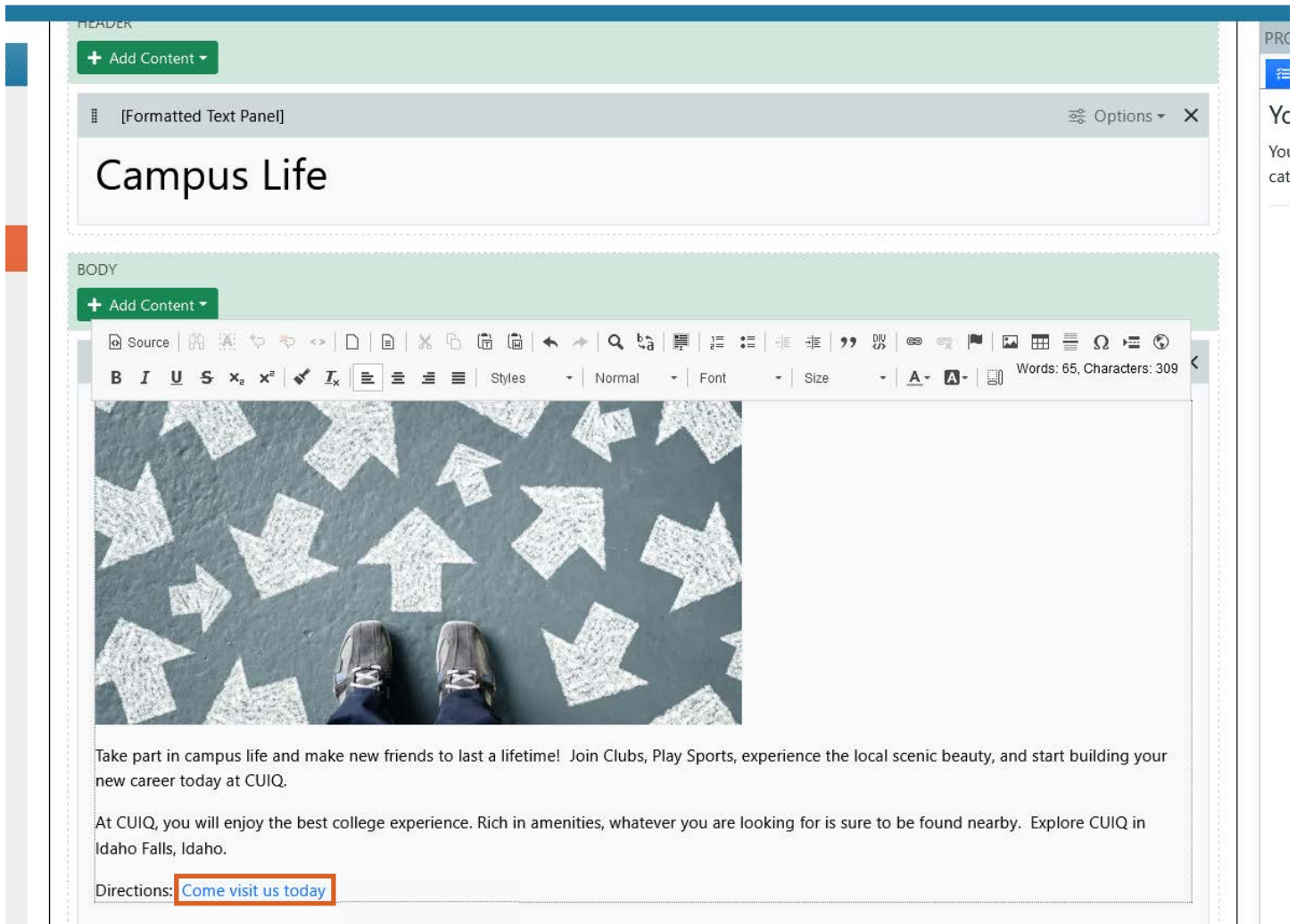
The screenshot shows a web editor interface. At the top, there's a header area with a green '+ Add Content' button and a '[Formatted Text Panel]' with an 'Options' dropdown. The main content area is titled 'Campus Life'. Below the title, there's a 'BODY' section with another '+ Add Content' button and a rich text editor toolbar. The editor contains an image of a person's feet on a patterned carpet. A 'Link' dialog box is open, showing the 'Link Info' tab. The 'Display Text' field contains 'Come visit us today'. The 'Link Type' is set to 'URL'. The 'Protocol' is 'http://'. The 'URL' field contains a long alphanumeric string: '0x2311c9fc094c49c9f8m2l3d43.4926607l4d-112.0407584'. The dialog box has 'OK' and 'Cancel' buttons. Below the image, there's text: 'Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ. At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho. Directions: Come visit us today'.

➤ After the URL has been added, click **OK**.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued

After adding the URL, the link text on the page will look like the following:

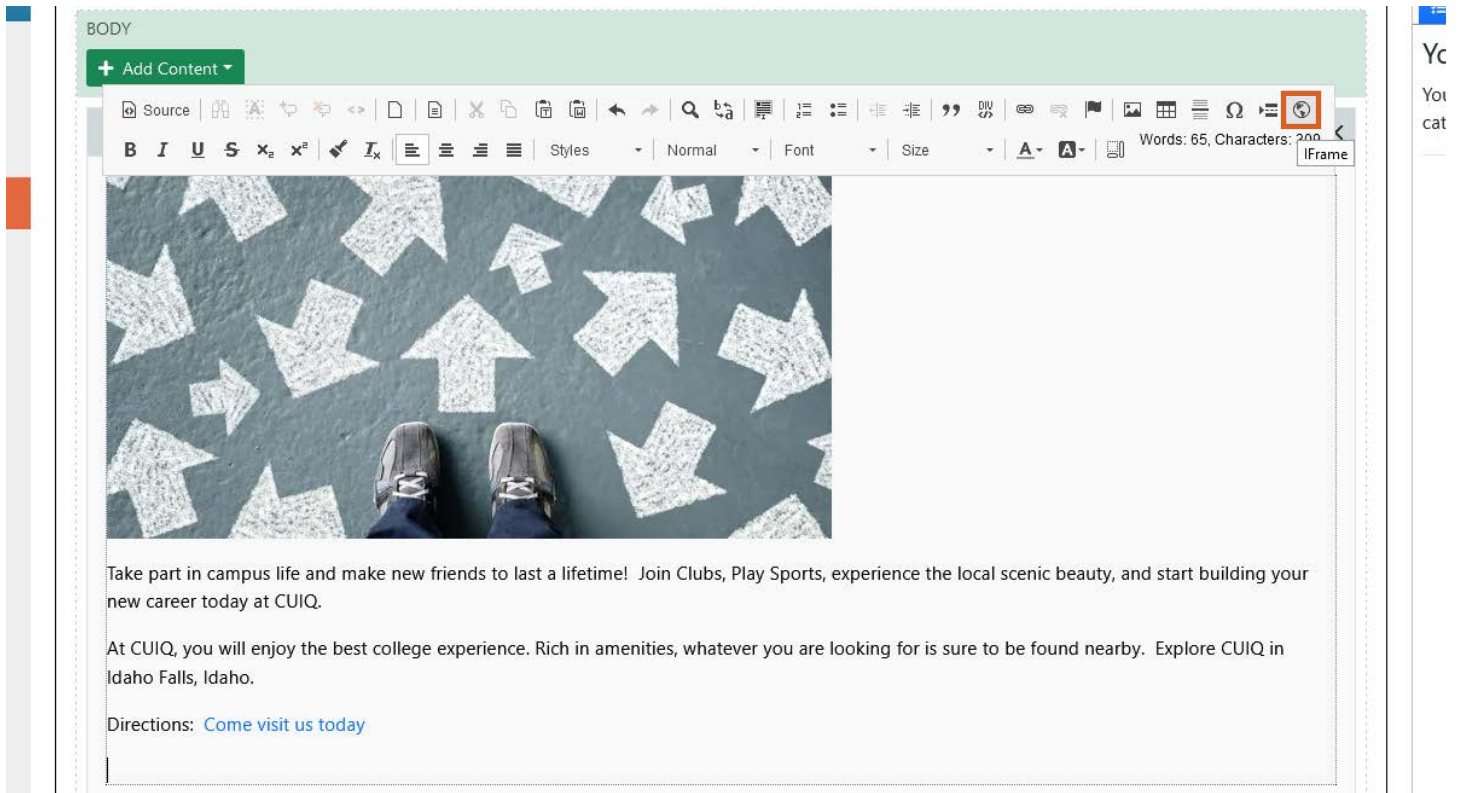


The screenshot displays a web editor interface. At the top, there is a 'HEADER' section with a green background and a '+ Add Content' button. Below this, a '[Formatted Text Panel]' is visible, containing the text 'Campus Life'. The main content area is labeled 'BODY' and also features a '+ Add Content' button. A rich text editor toolbar is present, showing various formatting options like bold, italic, underline, and font color. The body content includes an image of a person's feet standing on a dark carpet with a pattern of white arrows. Below the image, there are two paragraphs of text: 'Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ.' and 'At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho.' The final line of text is 'Directions: [Come visit us today](#)', where the link text is highlighted with a red border.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued

An inline frame can be added to the page using the IFrame tool.

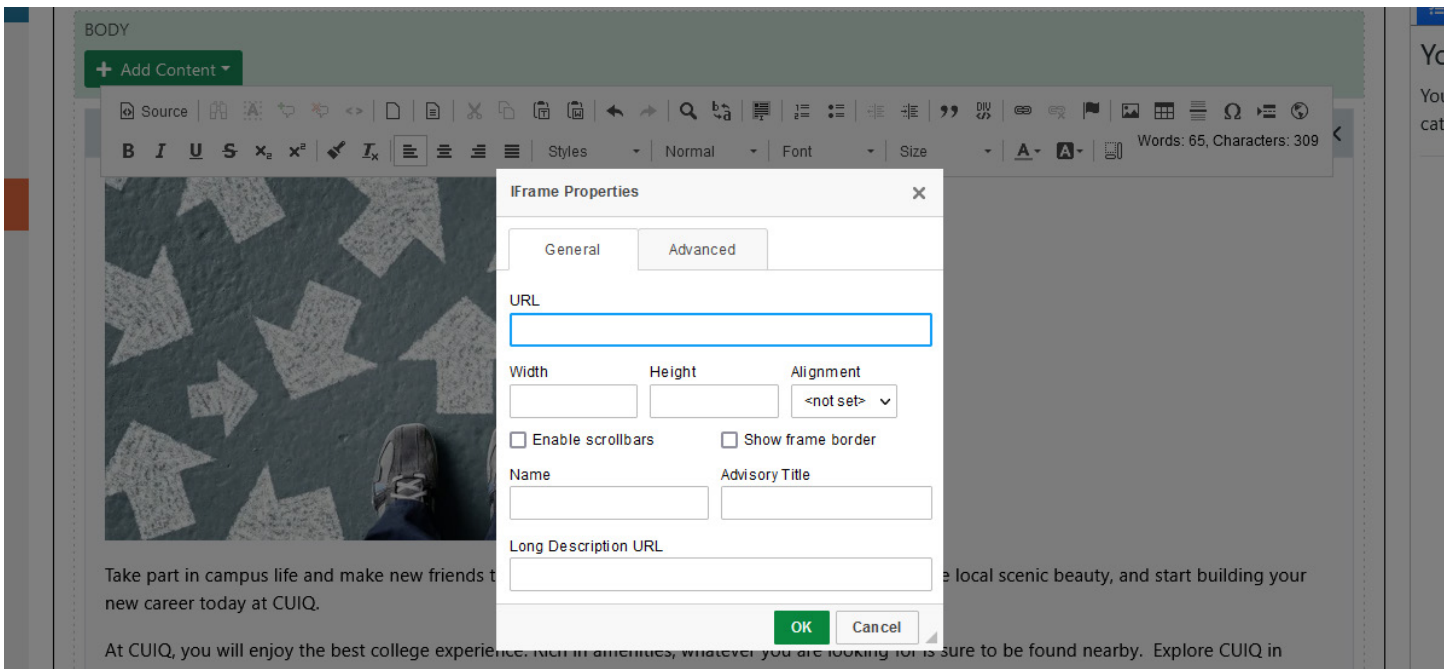


The screenshot shows a web editor interface. At the top, there is a green bar with the text "BODY" and a "+ Add Content" button. Below this is a toolbar with various icons for editing content. The "IFrame" icon, which is a square with a circular arrow, is highlighted with a red box. Below the toolbar, there is a large image of a person's feet standing on a floor with a pattern of white arrows pointing in various directions. Below the image, there is a text area containing the following text: "Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ." followed by "At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho." and "Directions: [Come visit us today](#)".

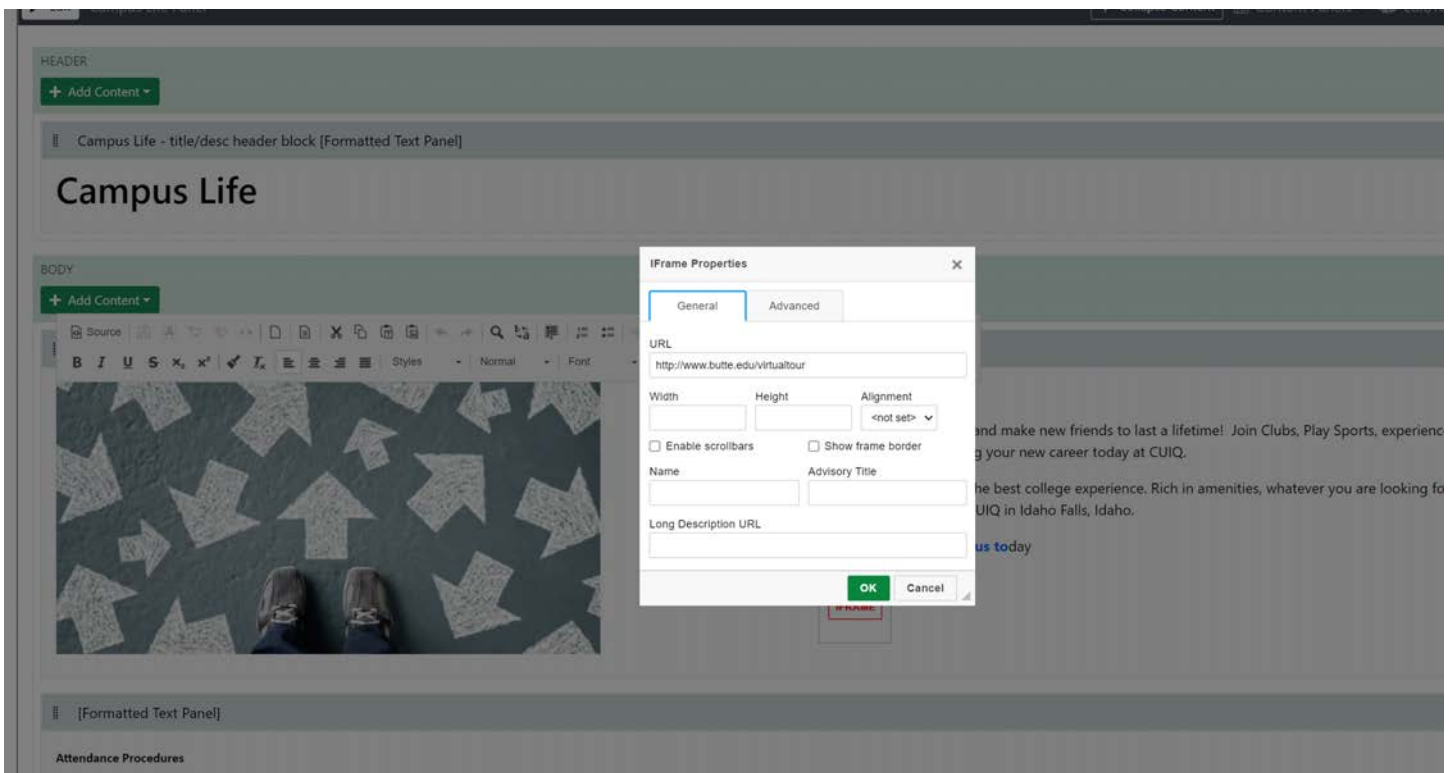
Click the **IFrame** tool to access the **IFrame Properties** manager.

## Adding Content to Pages - continued

### Adding an Image, Link and Inline Frame to a Page - continued



 In the **General** tab, type the **URL** for the IFrame you are linking to the page.



 Make any necessary adjustments to the IFrame using the other options, and click **OK**.

# Adding Content to Pages - continued

## Adding an Image, Link and Inline Frame to a Page - continued

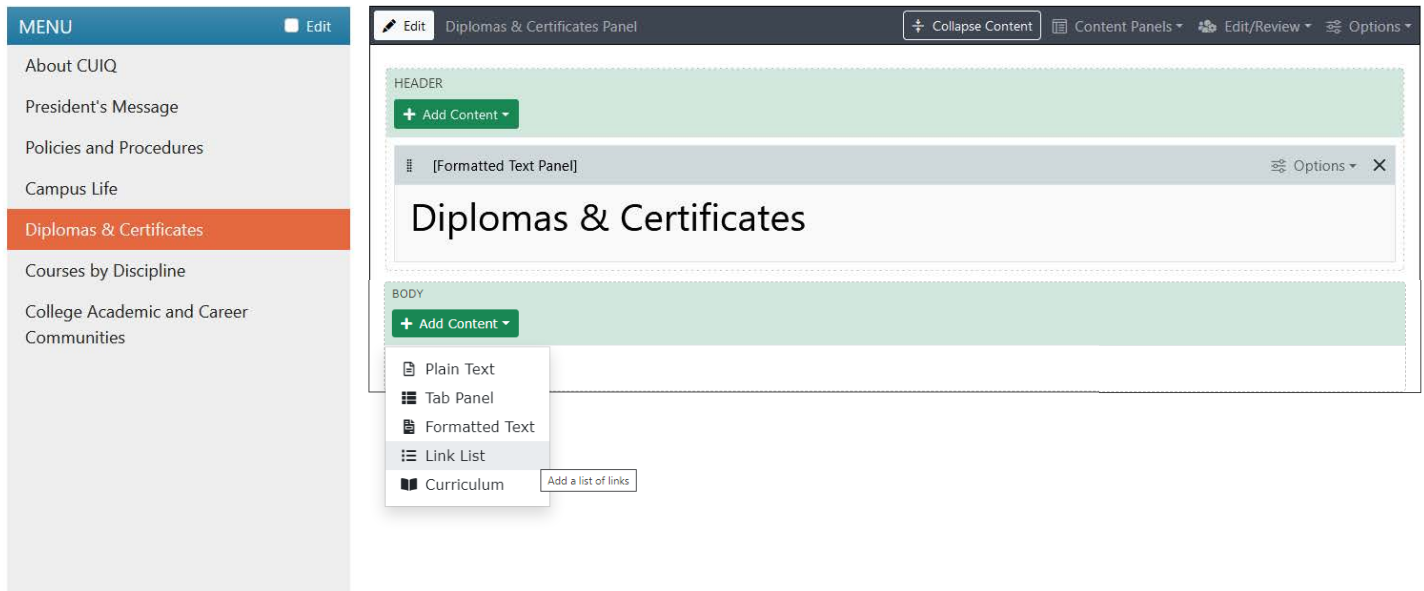
After exiting out of Edit Mode, the page will look like the following:

The screenshot shows the CurriQūnet Academic Catalog 2021-2022 interface. At the top, there is a navigation bar with 'Edit Mode' and 'CurriQūnet SupportAdmin' options. The main header includes the CurriQūnet logo and 'Academic Catalog 2021-2022'. A search bar and 'Export Page as PDF' button are also present. On the left, a 'MENU' sidebar lists various categories, with 'Campus Life' highlighted. The main content area is titled 'Campus Life' and features a large image of a person's feet on a patterned carpet. Below the image, there is a paragraph of text encouraging participation in campus life, followed by a link for directions. A black box with white text at the bottom of the main content area reads: 'Winter/Spring 2022 Registration for Currently Enrolled Students is open!'. On the right, a 'PROPERTIES' sidebar shows 'My Tasks' and a message: 'Your Queue is Empty. You do not currently have any assigned tasks for this catalog.'

# Adding Content to Pages - continued

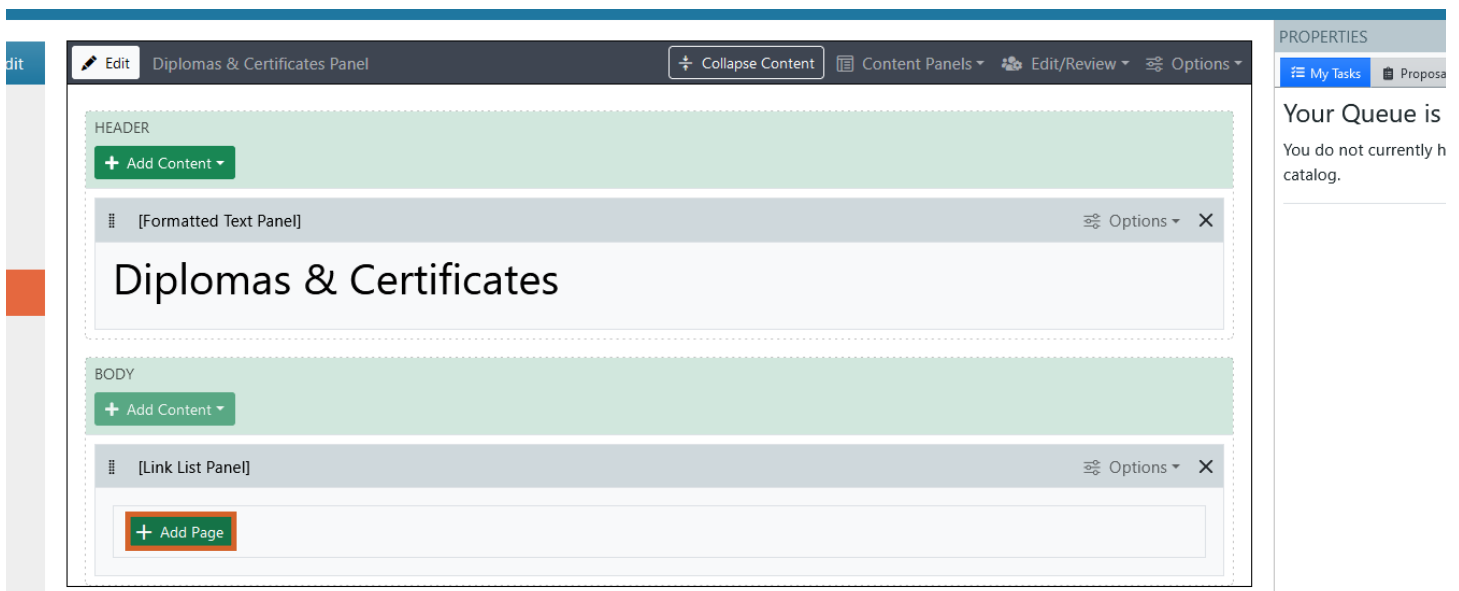
## Creating a Page with a Link List

In this example, we will add a **Link List** content type to a **Body content panel**.



Click the **'+Add Content'** button in the **Body** panel to add a content type. Click on a content type in the dropdown to add it. For this example, we'll be adding a **Link List**.

Like the Tab Panel, once a **Link List** content type is added to a content panel, no other content types can be added to that content panel. (See the below example - once the Link List has been added, the **'+Add Content'** button in the **Body content panel** is no longer clickable.)



Click the **'+Add Page'** button in the **Body** panel to add a linked page to the Link List Panel.

## Adding Content to Pages - continued

### Creating a Page with a Link List - continued

 *The link will be blank with placeholder text that says '[Click to add a page name]'. Click the link to edit the link title.*

Link lists are organized and displayed in alphanumerical order according to the first character in a link title.

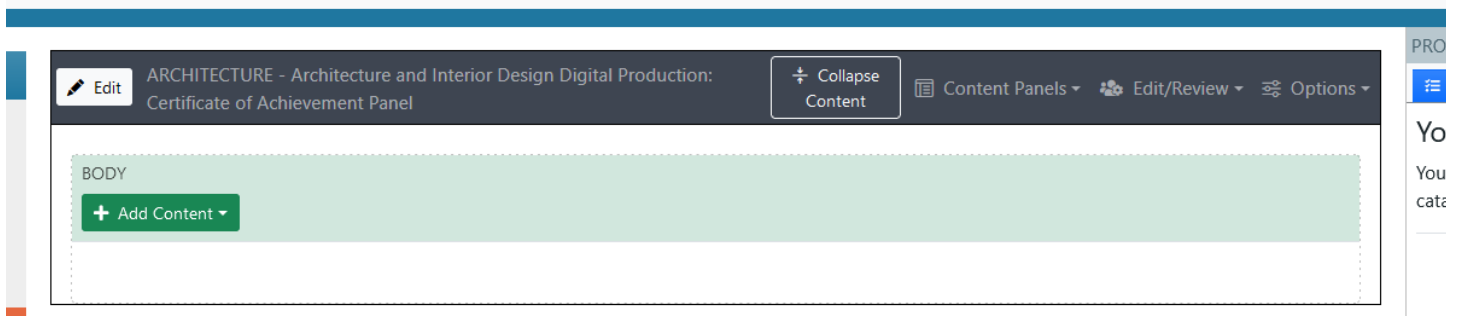
As in the below example, if a link title starts with "A", it will be displayed under an "A" section which will include all links which start with "A." In this case, the linked page is for a certificate program.

 *Click the link to add content to the linked page.*

## Adding Content to Pages - continued

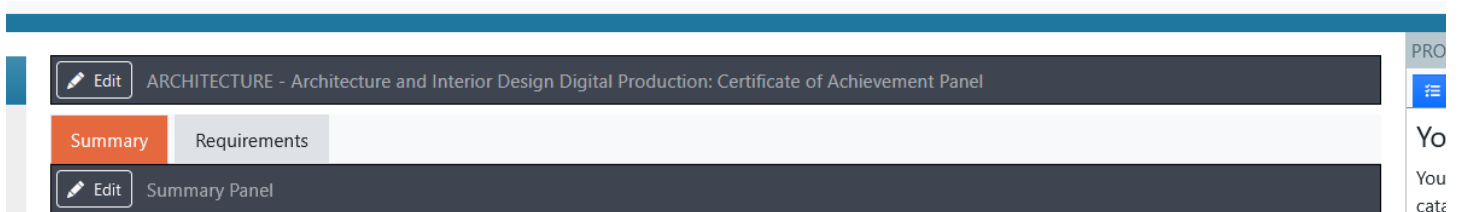
### Creating a Page with a Curriculum Panel

In this example we will be adding curriculum panels to the linked page created in the previous example.



➤ *Activate Edit Mode for the page. Click the '+Add Content' button in the **Body** panel to add a content type to the linked page.*

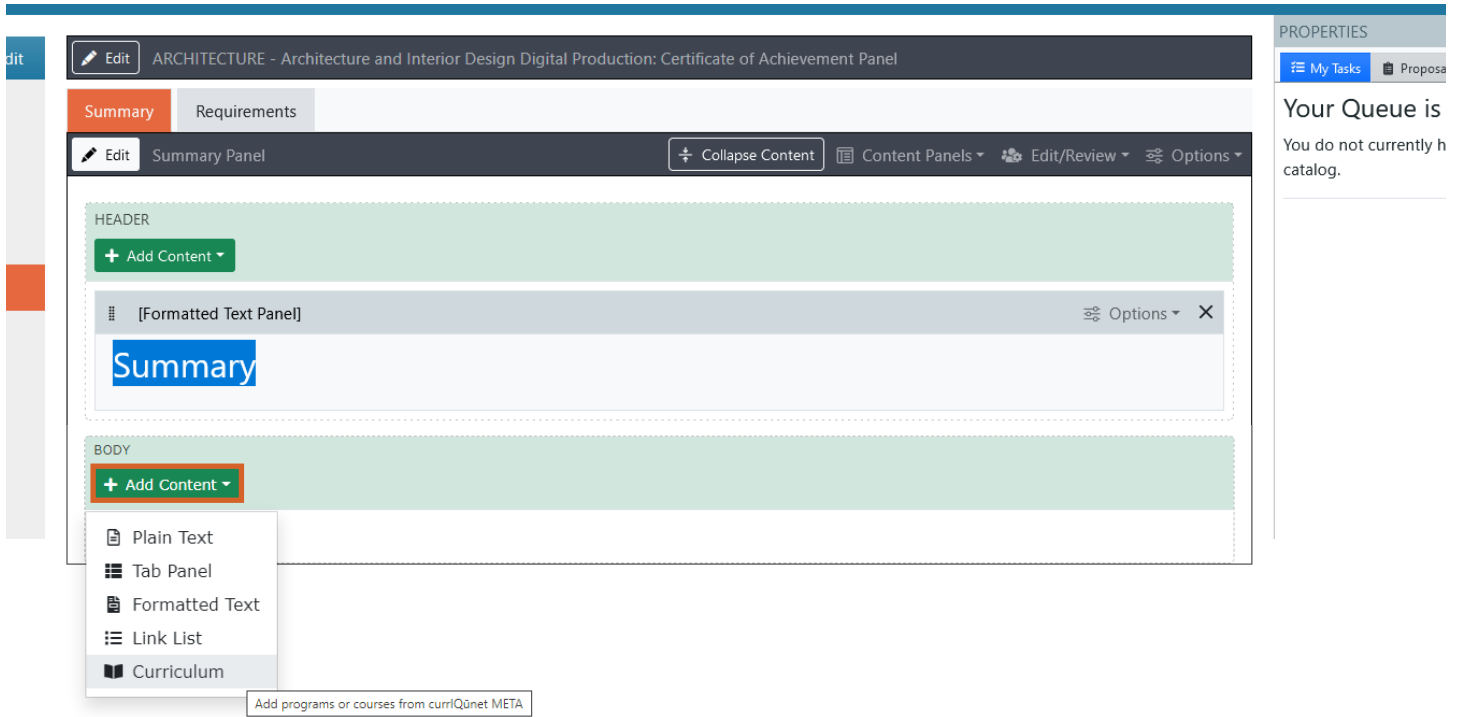
In the below screenshot, a tab panel with two tabs has been added to the linked page - 'Summary' and 'Requirements'.



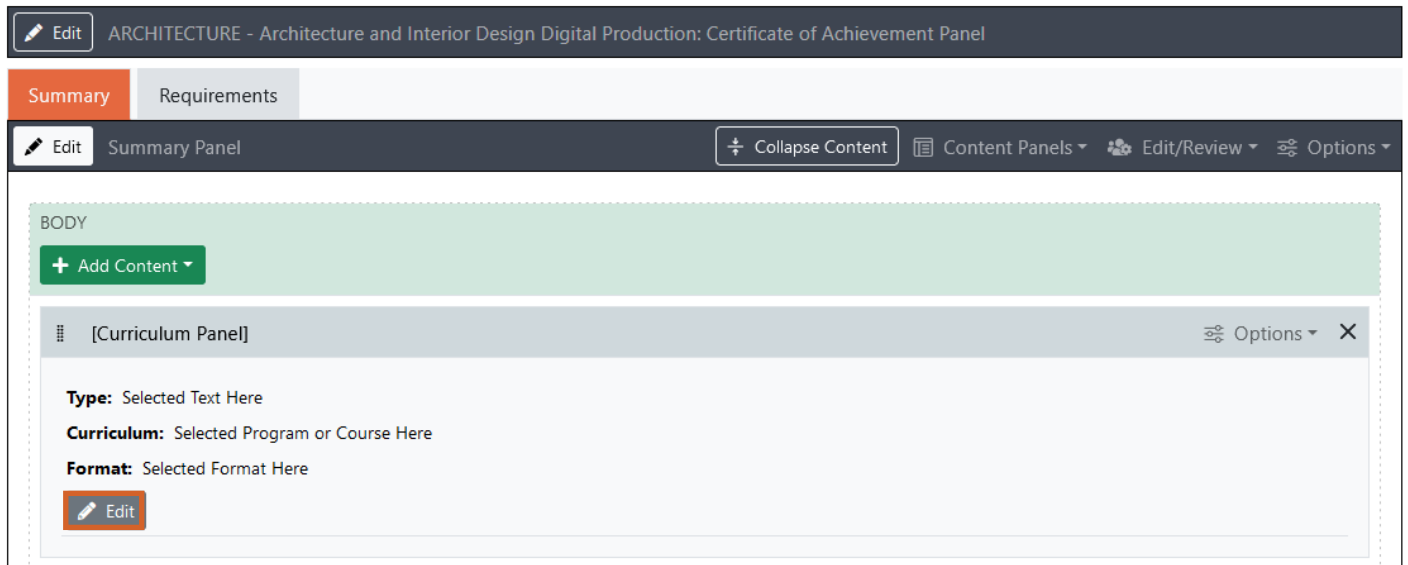
➤ *Click on one of the tabs to add content to it, and activate Edit Mode for the tab.*

# Adding Content to Pages - continued

## Creating a Page with a Curriculum Panel - continued



Click the '+Add Content' button in the **Body** panel to add a **Curriculum** panel.



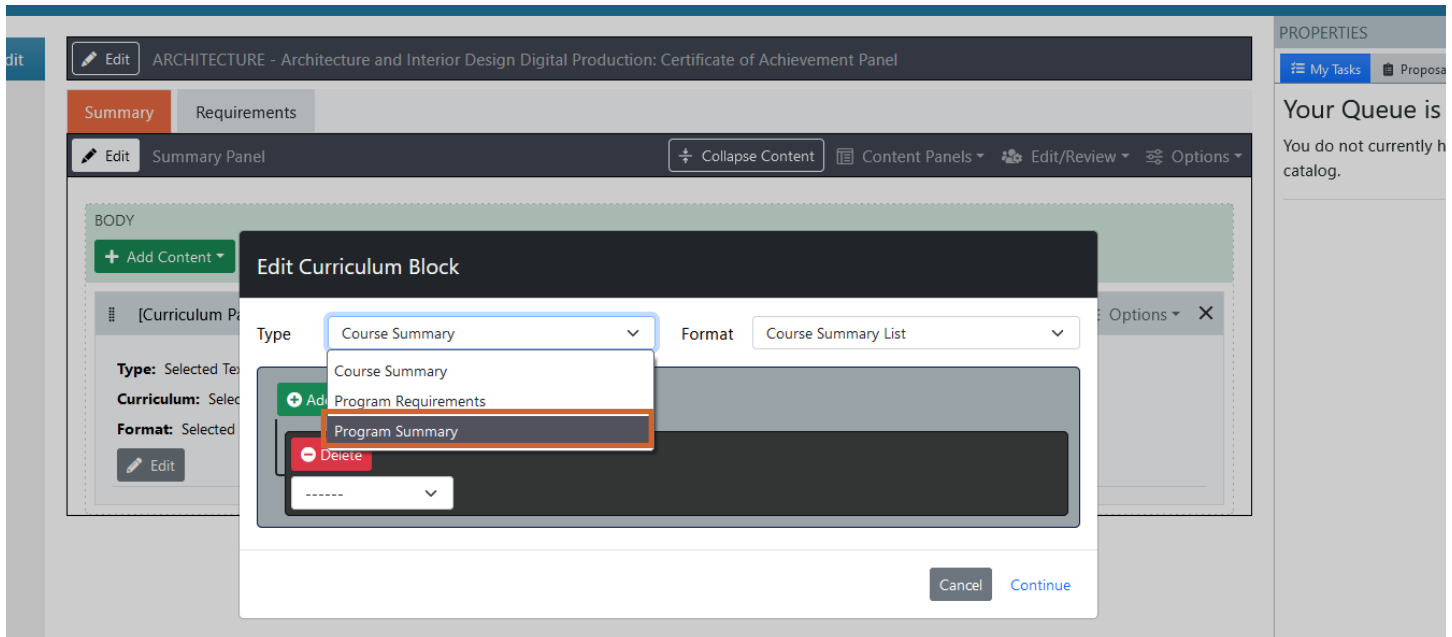
Click the 'Edit' button in the **Curriculum** panel to add a specific curriculum.

## Adding Content to Pages - continued

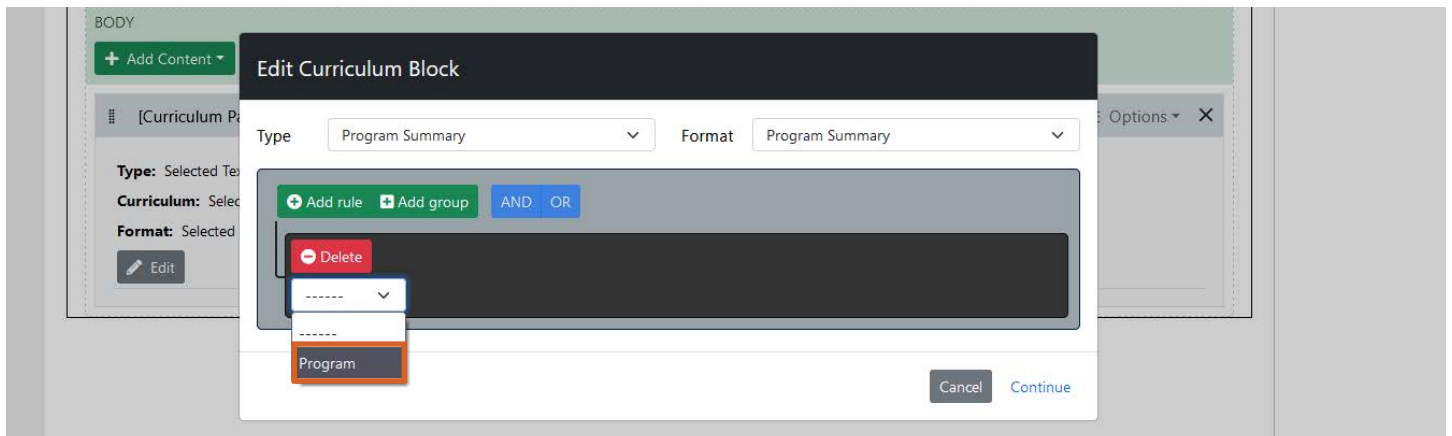
### Creating a Page with a Curriculum Panel - continued

#### Program Summary

When adding curriculum, a popup will appear allowing you to choose the type of curriculum and the format. In this example, we will be adding a **Program Summary**.



Click the **Type** dropdown and choose **Program Summary**.



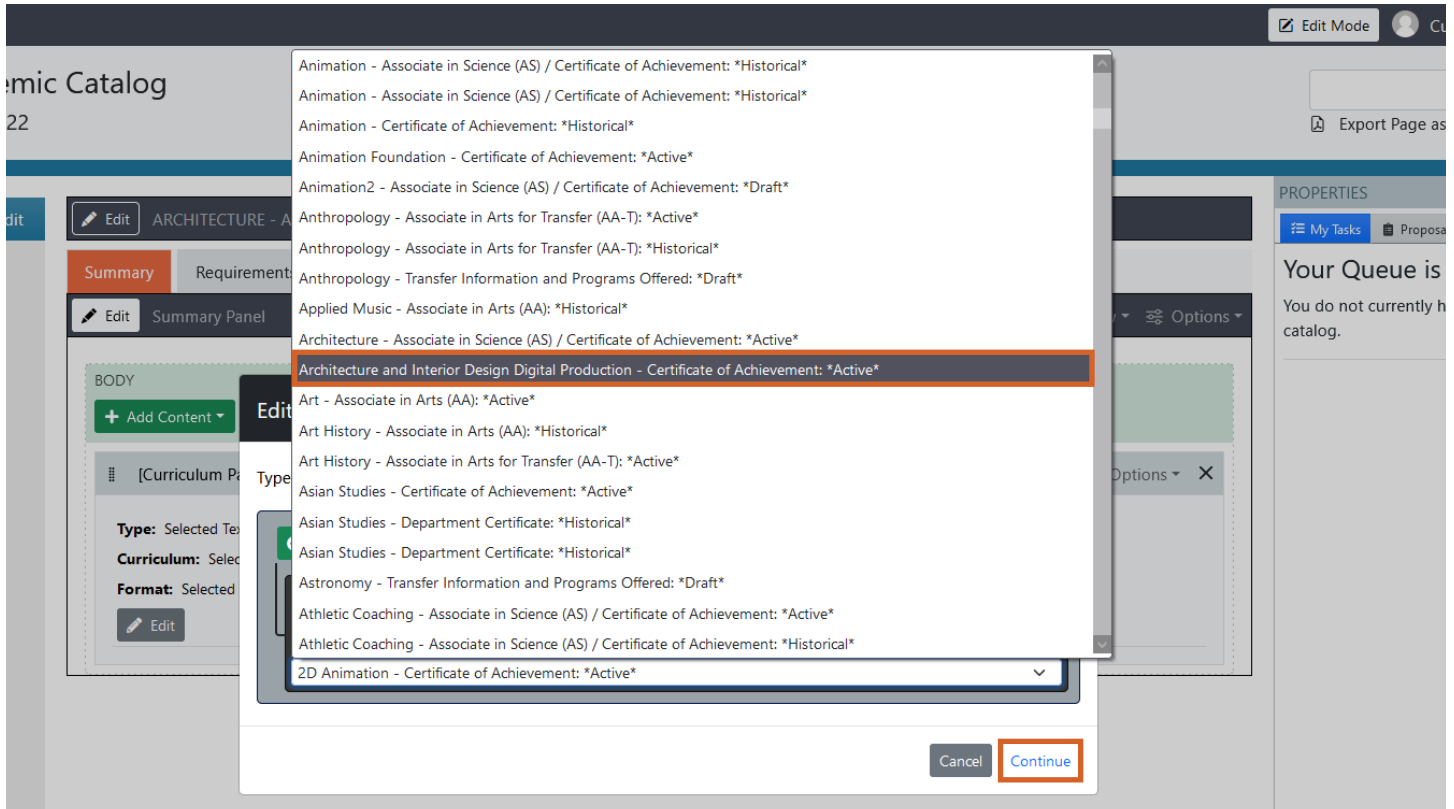
Choose **Program** from the dropdown.

## Adding Content to Pages - continued

### Creating a Page with a Curriculum Panel - continued

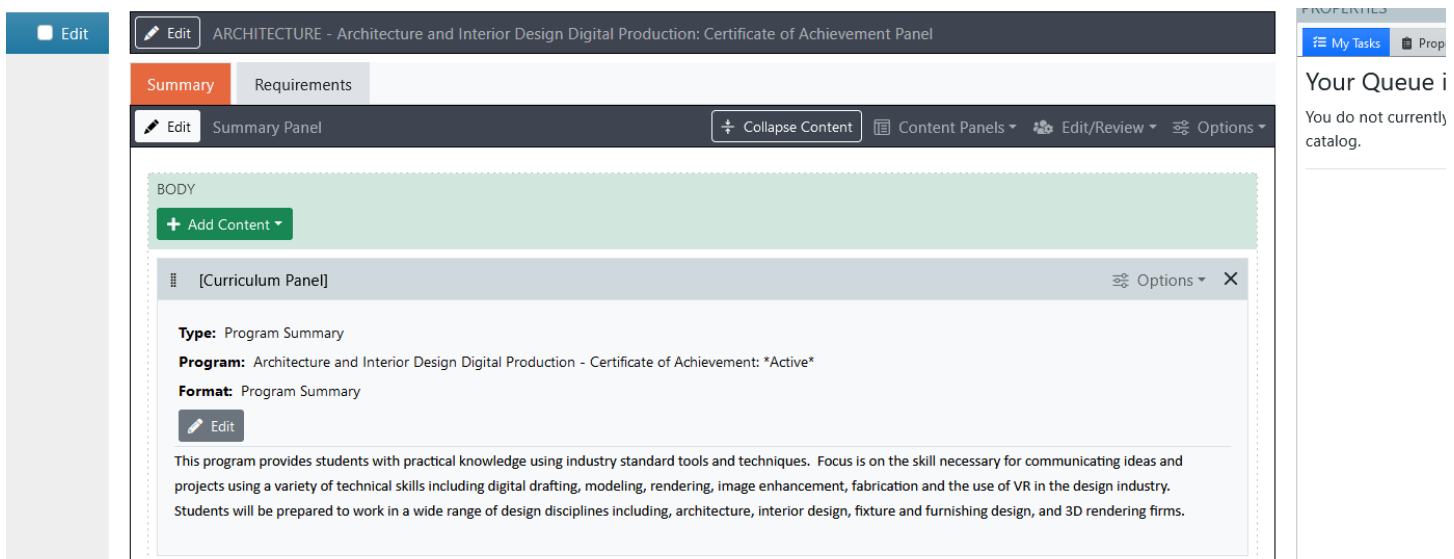
#### Program Summary - continued

Another dropdown will appear with a list of programs to choose from.



Choose the appropriate program from the dropdown to display a summary for that program and click **Continue**.

After adding a program summary, the curriculum panel will look like the following:



# Adding Content to Pages - continued

## Creating a Page with a Curriculum Panel - continued

### Program Requirements

Now we will add a **Program Requirements** curriculum panel to the Requirements tab.

Click on the **'+Add Content'** button to add content to the **Body panel**. Add a **Curriculum** panel.

## Adding Content to Pages - continued

### Creating a Page with a Curriculum Panel - continued

#### Program Requirements - continued

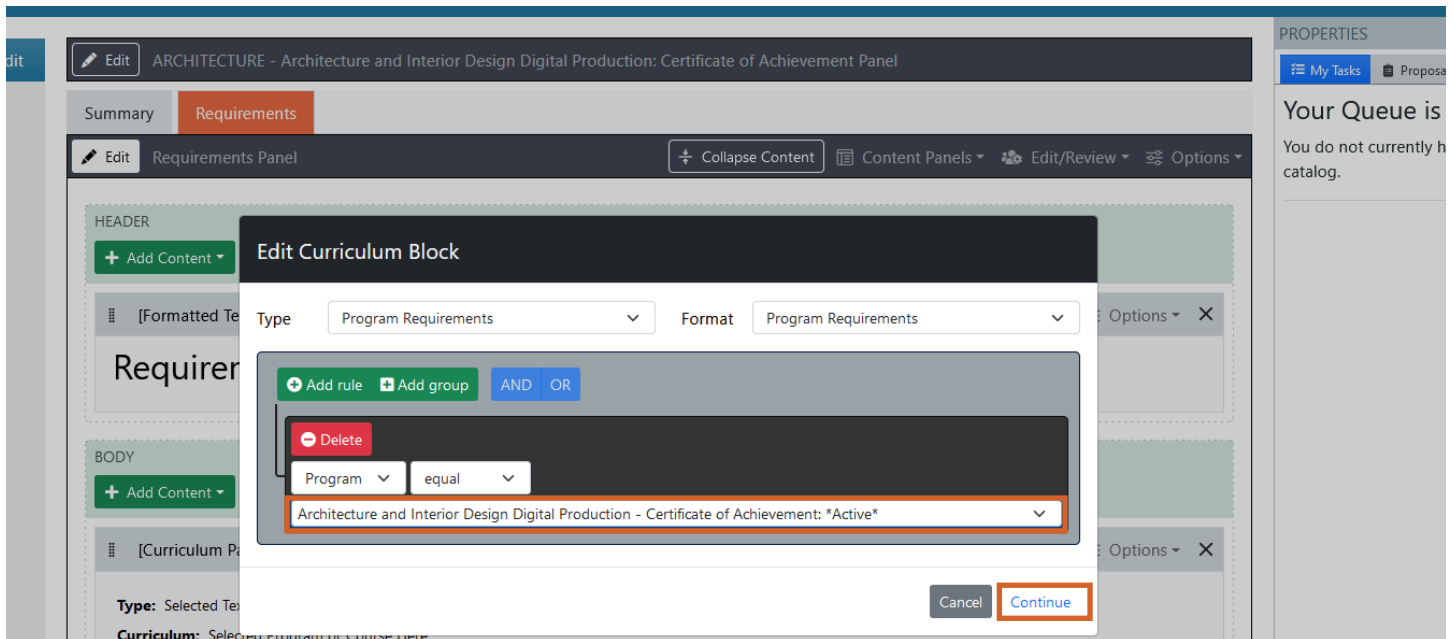
Click the **Type** dropdown and choose **Program Requirements**.

Choose **Program** from the dropdown.

# Adding Content to Pages - continued

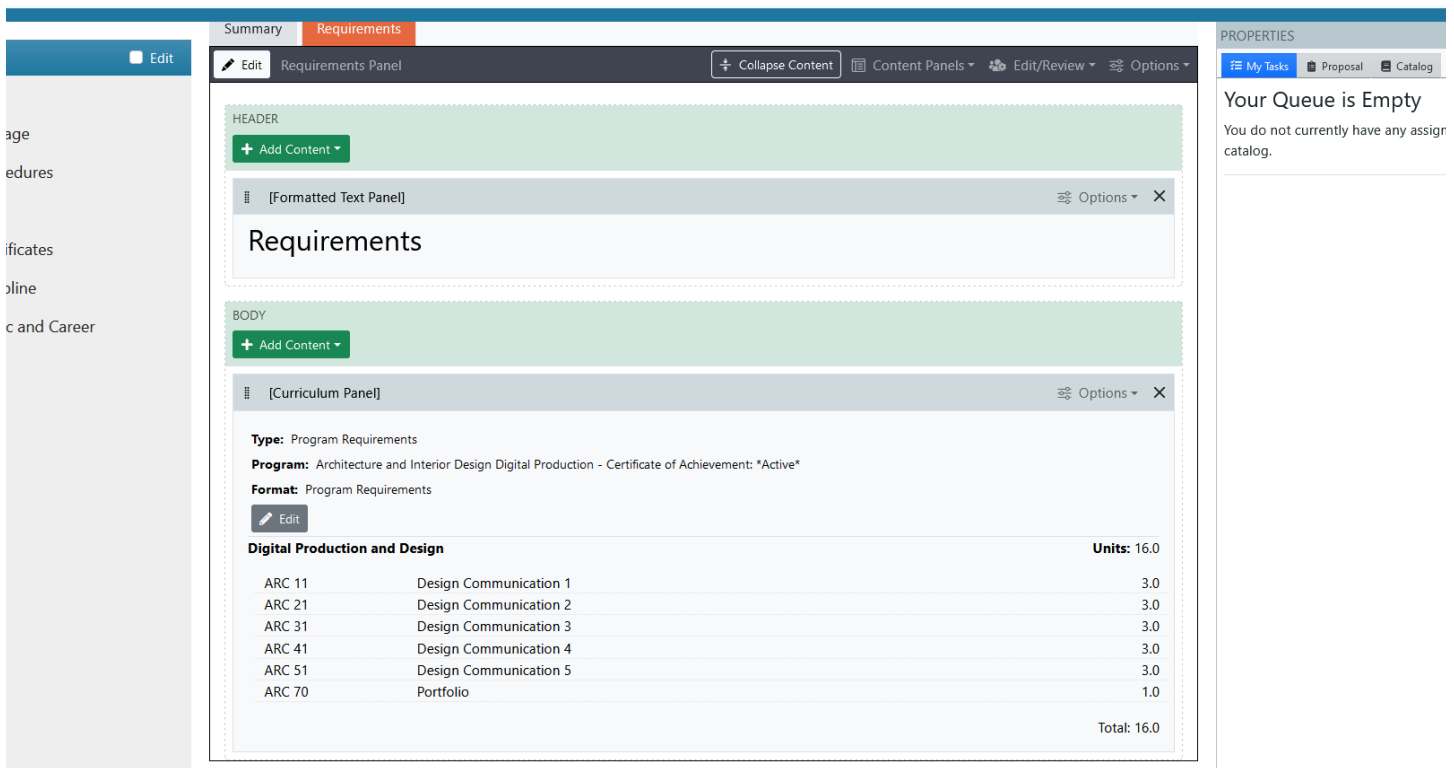
## Creating a Page with a Curriculum Panel - continued

### Program Requirements - continued



Choose the appropriate program from the dropdown in order to display requirements for that program and click **Continue**.

After adding program requirements, the curriculum panel will look like the following:



# Adding Content to Pages - continued

## Creating a Page with a Curriculum Panel - continued

### Program Requirements - continued

The finished page for the program will look like the following after exiting out of Edit Mode:

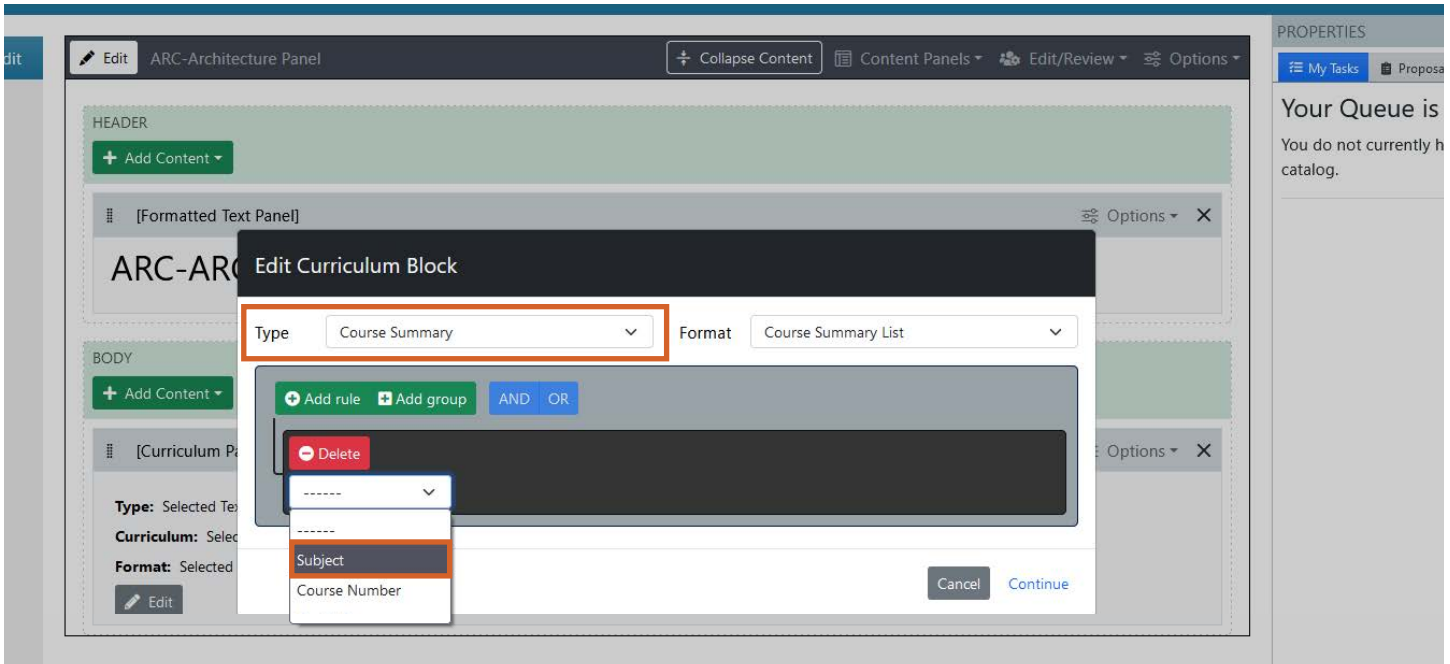
The screenshot displays the CurriQūnet Academic Catalog interface. At the top, there is a navigation bar with the CurriQūnet logo, the text 'Academic Catalog 2021-2022', and a search bar. A dark header bar contains 'CUIQ Academic Catalog 2021-2022 (Draft)', 'Edit Mode', and the user 'CurriQūnet SupportAdmin'. A left sidebar menu lists various categories, with 'Diplomas & Certificates' highlighted in orange. The main content area features a title 'ARCHITECTURE - Architecture and Interior Design Digital Production: Certificate of Achievement' and two tabs: 'Summary' (active) and 'Requirements'. The 'Summary' tab contains a paragraph describing the program's focus on practical knowledge and technical skills. A right sidebar titled 'PROPERTIES' shows 'My tasks' and a message: 'Your Queue is Empty. You do not currently have any assigned tasks for this catalog.' At the bottom right of the main content area, there is an 'Export Page as PDF' button.

## Adding Content to Pages - continued

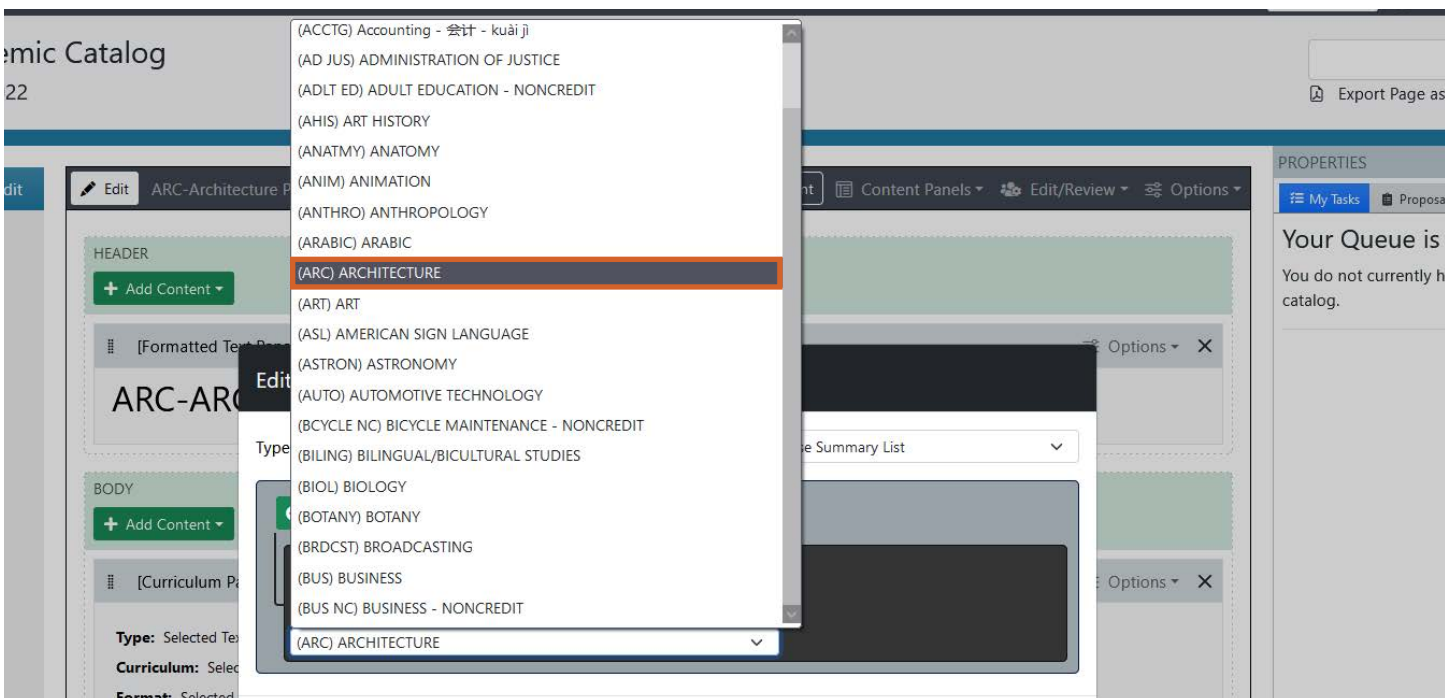
### Creating a Page with a Curriculum Panel - continued

#### Course Summary

A **Course Summary** can be added for courses. First we will add a course summary that is organized by **Subject**.



Choose **Course Summary** as the **Type**, then choose **Subject** from the dropdown.



Choose the appropriate subject from the Subject dropdown in order to display a summary of all courses from that subject.

# Adding Content to Pages - continued

## Creating a Page with a Curriculum Panel - continued

### Course Summary - continued

After adding a course summary of all courses in a subject, the curriculum panel will look like the following:

The screenshot displays a web editor interface for editing a page titled "ARC-Architecture Panel". The interface is divided into several sections:

- Header:** A green bar with a "+ Add Content" button and a "[Formatted Text Panel]" containing the text "ARC-ARCHITECTURE".
- Body:** A green bar with a "+ Add Content" button and a "[Curriculum Panel]".
- Curriculum Panel Content:**
  - Type:** Course Summary
  - Subject:** (ARC) ARCHITECTURE
  - Format:** Course Summary List
  - ARC 10—Studio 1 (3)**  
An introduction to studio and design theory through exploration in concepts of space, form, function, materials and creative construction. Emphasis is placed on critical thinking and conceptualization as a basis for designing projects through sketching, model making, and other media. (GC.) Effective: Fall 2020.
  - ARC 11—Design Communication 1 (3)**  
Three dimensional drawing for interior and architectural designers with an emphasis on simplified systems of linear perspective drawing and the fundamentals of quick sketching. Studies include an introduction to perspective and rendering of interior installations using size, scale, and shading to show depth and 3D form. (GC.) Effective: Fall 2020.
  - ARC 20—Studio 2: Architecture (3)**  
Prerequisite(s): ARC 10; ARC 11. A studio course which focuses on the development of context and precedent while designing spaces and architectural forms. Simple built environments are developed using design principles in context with spatial relationships, human interaction, and materiality. Emphasis is placed on the design process and human experience. Visual and oral presentations are used in the development of a course portfolio. (GC.) Effective: Fall 2020.

On the right side, a "PROPERTIES" panel shows "Your Queue is Empty" and "You do not currently have any assign catalog." A sidebar on the left contains navigation links like "Page", "Modules", "Certificates", "Online", and "Academic and Career".



The steps are similar to add a course summary organized by **Course Number**, which would display all courses that have a specific course number (e.g. 101 or 300).


# Adding Content to Pages - continued

## Changing Columns on a Page

Content on a page is organized into only one column by default, but can be organized into two or up to three columns if desired. Column count can be changed by accessing the **Options** dropdown in a content type (such as a formatted text panel). Column count can be changed for the web display (**Web View**), for the PDF display (**PDF Output**), or for both.

The screenshot shows a page editor interface. At the top, there is an 'Edit' button. Below it is a large image of a person's feet on a green carpet with white arrows. Underneath the image is a paragraph of text: 'Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ.' This is followed by another paragraph: 'At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho.' Below that is a link: 'Directions: Come visit us today' and an 'IFRAME' placeholder. The main content area is divided into two columns. The left column has a section header 'Attendance Procedures' and text about the academic year. The right column has a section header '28. Preservation of Evidence' and text about evidence preservation. A dropdown menu is open over the right column, showing 'Options' with a close button. The dropdown has two sections: 'Web View' and 'PDF Output'. Each section has a 'Columns (1, 2, or 3)' dropdown set to '2', and checkboxes for 'Show Column Separator', 'Show Section Separator', and 'Exclude From Full PDF Output'.

 Click **Options** on the top right of the content type. In the dropdown, either type in the number of columns or use the up and down arrows (  ) to increase or decrease the number of columns for web and/or PDF display. The number of columns is limited to 1, 2, or 3 columns.

 **NOTE:** Column count can be changed on all content types, but the option should only be used for plain text, formatted text, and curriculum panel content types. Changing the column count on a link list or a tab panel content type causes display issues.

# Adding Content to Pages - continued

## Changing Columns on a Page - continued

Below is what the page would look like with the second formatted text panel divided into two columns:

The screenshot shows the CurriQūnet Academic Catalog 2021-2022 interface. The top navigation bar includes the site name, 'Academic Catalog 2021-2022', and user controls like 'Edit Mode' and 'CurriQūnet SupportAdmin'. A search bar and 'Export Page as PDF' button are also present. On the left, a 'MENU' sidebar lists various categories, with 'Campus Life' highlighted. The main content area features a 'Campus Life' header with a photograph of a person's feet on a patterned carpet. Below the photo, there is introductory text about campus life and a link to 'Come visit us today'. A prominent black box with white text announces 'Winter/Spring 2022 Registration for Currently Enrolled Students is open!'. The 'Attendance Procedures' section is divided into two columns. The first column contains two paragraphs of text. The second column contains a numbered list of four items, with the first item partially cut off. On the right side, a 'PROPERTIES' panel shows 'My Tasks' and 'Your Queue is Empty'.

**Campus Life**

Take part in campus life and make new friends to last a lifetime! Join Clubs, Play Sports, experience the local scenic beauty, and start building your new career today at CUIQ.

At CUIQ, you will enjoy the best college experience. Rich in amenities, whatever you are looking for is sure to be found nearby. Explore CUIQ in Idaho Falls, Idaho.

Directions: [Come visit us today](#)

**Winter/Spring 2022 Registration for Currently Enrolled Students is open!**

**Attendance Procedures**

The academic year is divided into four 12-week quarters, each comprised of three sessions. Students may enroll in classes in most programs any month of the year.

The start-date of a session is the first Monday of the new course term. If the first Monday is a holiday, the start-date of the session will be the first Tuesday. For example, if the first class meeting offered in the September session meets on Mondays and Wednesdays, and Monday is the holiday, then that first

4. If clothes are changed, place soiled clothes in a paper bag (plastic destroys evidence) or secure evidence container. Please contact the Title IX Coordinator, for information regarding how and where to secure evidence.
5. Seeking medical treatment can be essential even if it is not for the purposes of collecting forensic evidence.

During the initial meeting between the Complainant and the Title IX Coordinator, the importance of taking these actions will be reiterated, if timely.

**PROPERTIES**

My Tasks Proposal Catalog

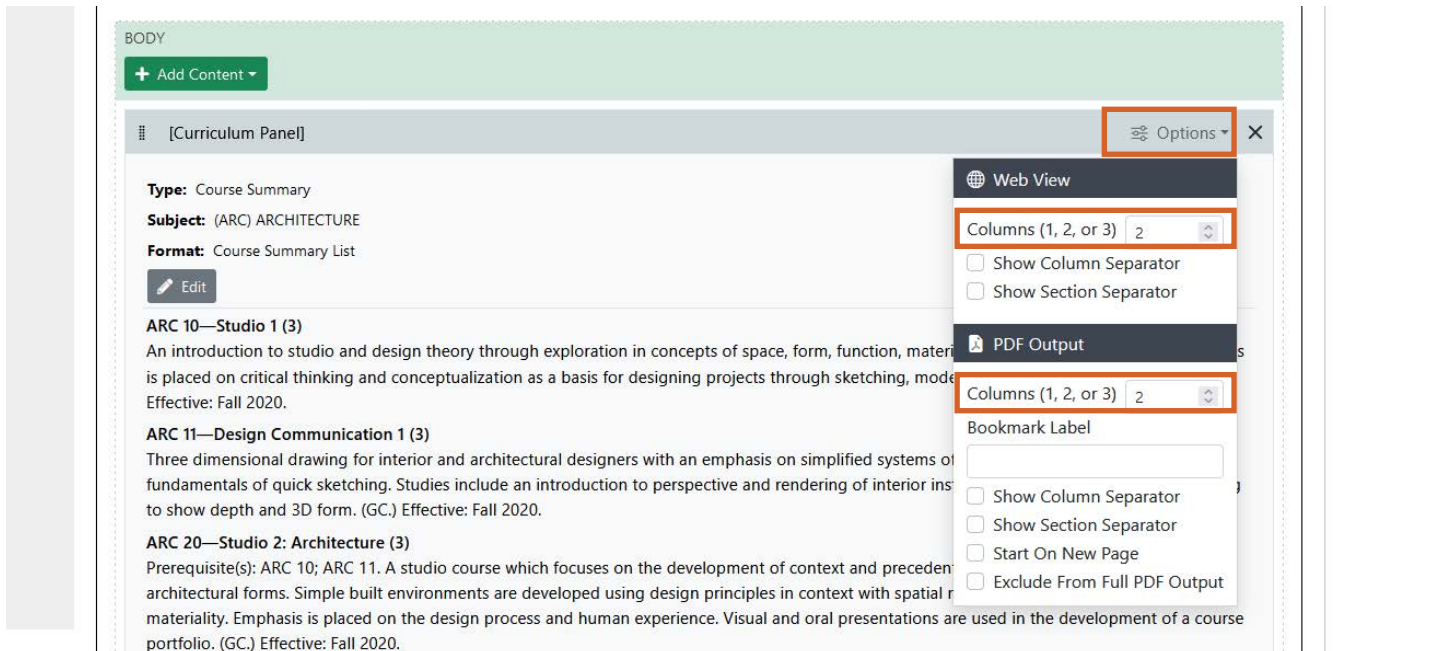
**Your Queue is Empty**

You do not currently have any assigned tasks for this catalog.

# Adding Content to Pages - continued

## Changing Columns on a Page - continued

Changing the column count on a curriculum panel follows the same process as a plain text or formatted text panel.



In the next section we will discuss how to delete pages and/or content within pages.

## Deleting Pages and Content

Content on a page can be immediately deleted by clicking the **X** button on the content type.

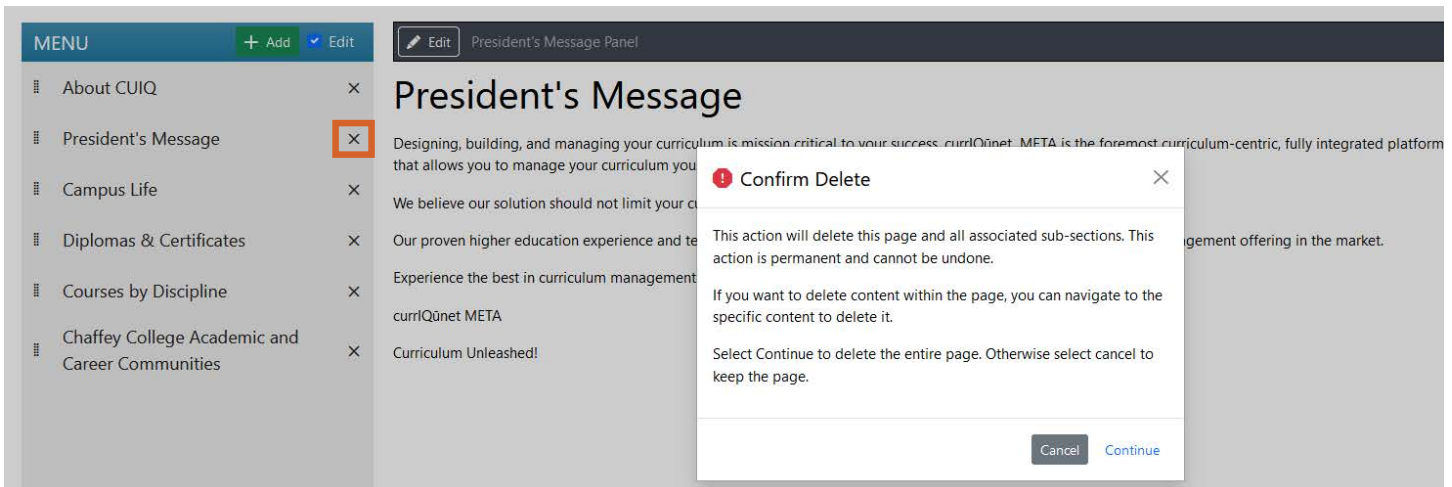


It is important to note that page and content deletion cannot be undone.

When content types (plain text, formatted text, curriculum panels, tab panels, and link lists) are deleted, there is no warning message; the content is deleted immediately.

Deleting a page, on the other hand, triggers a warning message that the page and all of its content will be deleted. This message will trigger when deleting a page from the **menu**, deleting a **tab** in a tab panel, and deleting a **link** from a link list.

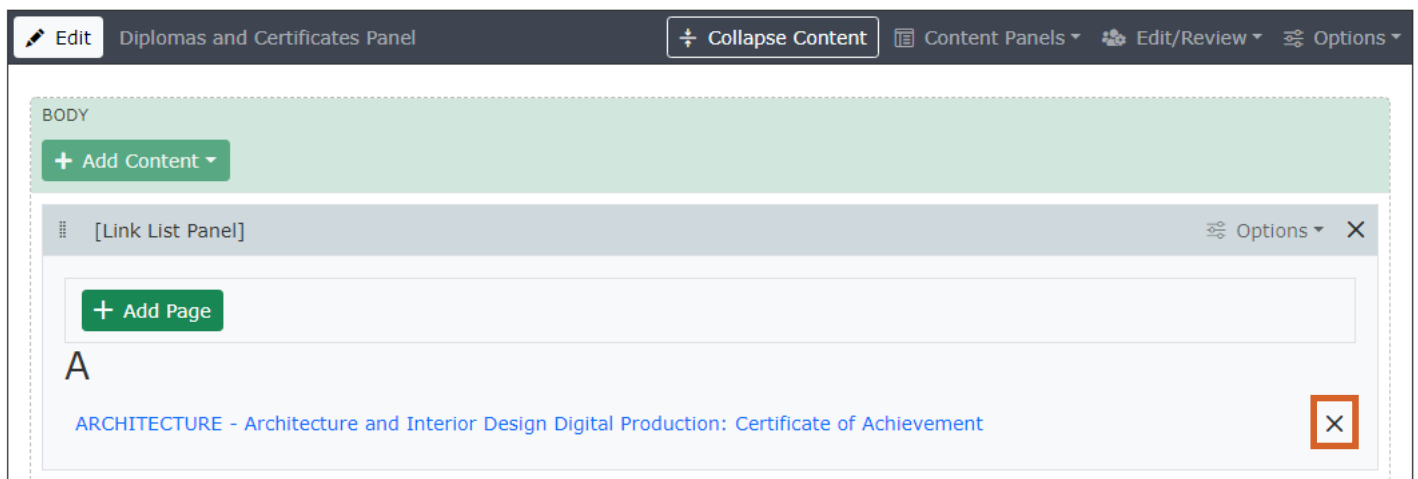
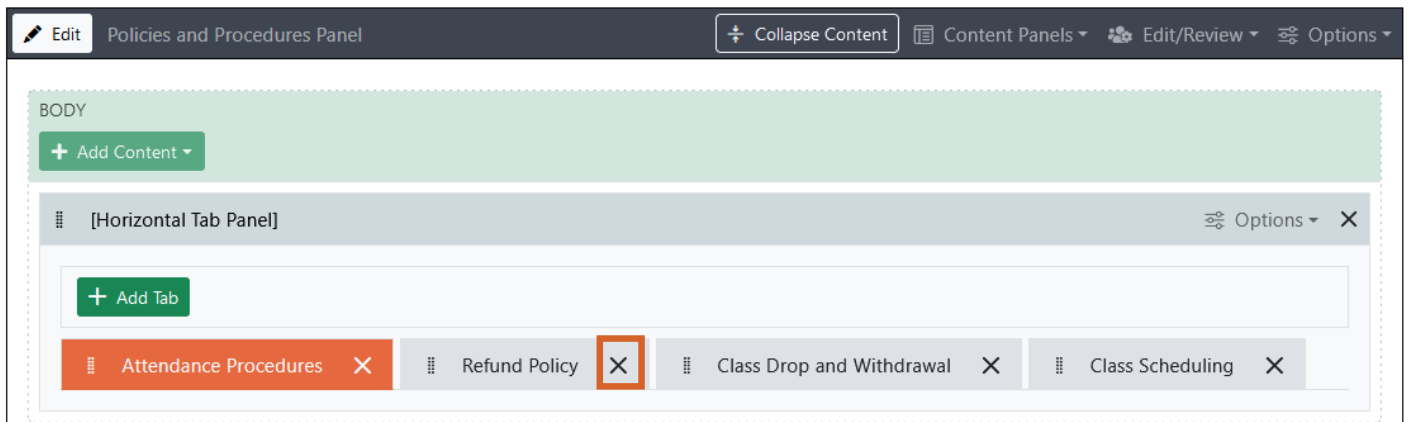
Pages can be deleted from the Menu by clicking the **X** next to the page name. This will trigger the warning message asking you to confirm that you wish to delete the page.



Click **Continue** to continue deleting the page. Click **Cancel** to cancel deleting the page.

## Deleting Pages and Content - continued

Tabs can be deleted from tab panels by clicking the **X** next to the tab name, and links can be deleted from link lists by clicking the **X** next to the link name. Deleting a tab or link will also trigger the warning message, since tabs and links are pages.

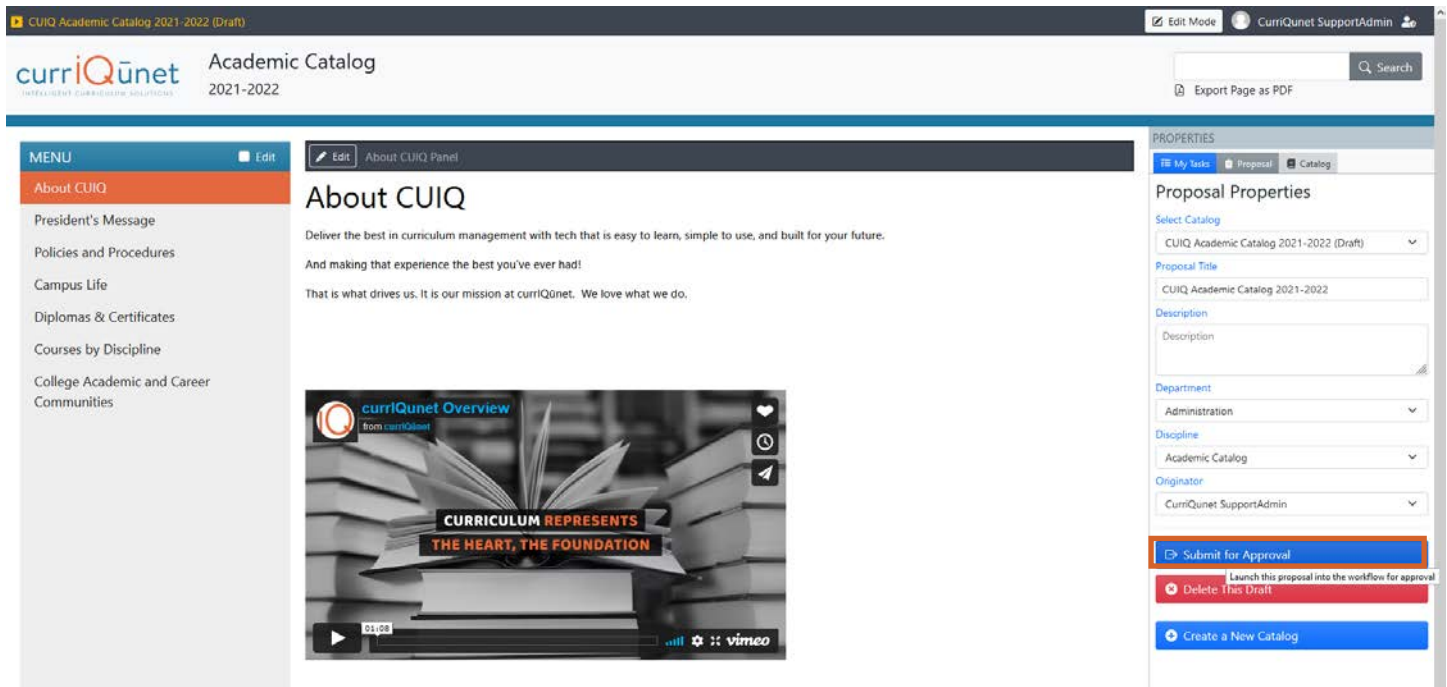


**!** NOTE: While the warning message will trigger when deleting a tab *within* a tab panel, and deleting a linked page *within* a link list, the message will **not** trigger when deleting the entire tab panel or the entire link list, even if there are tabs or links within those content types.

In the next section we will discuss how to submit a catalog draft proposal for approval in order to launch it into the workflow for review and implementation.

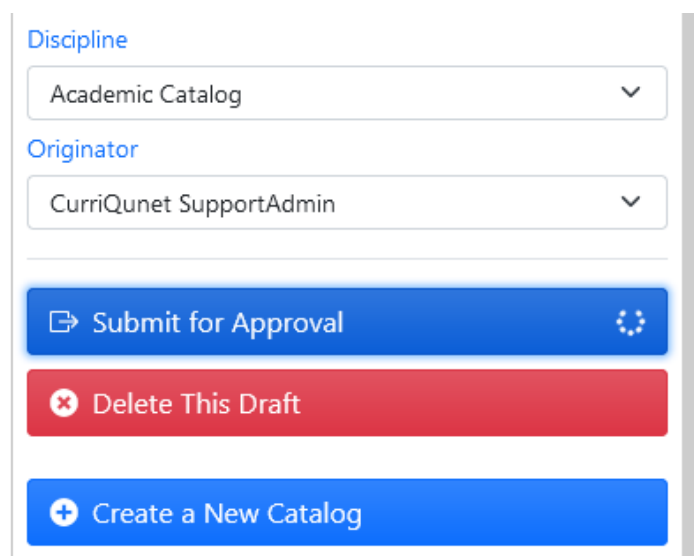
# Submit Catalog for Approval

When the catalog is completed to your satisfaction, you must submit it for approval so that it can be reviewed.



➤ In the **Properties** sidebar, click **Submit for Approval** to launch the catalog proposal into the workflow.

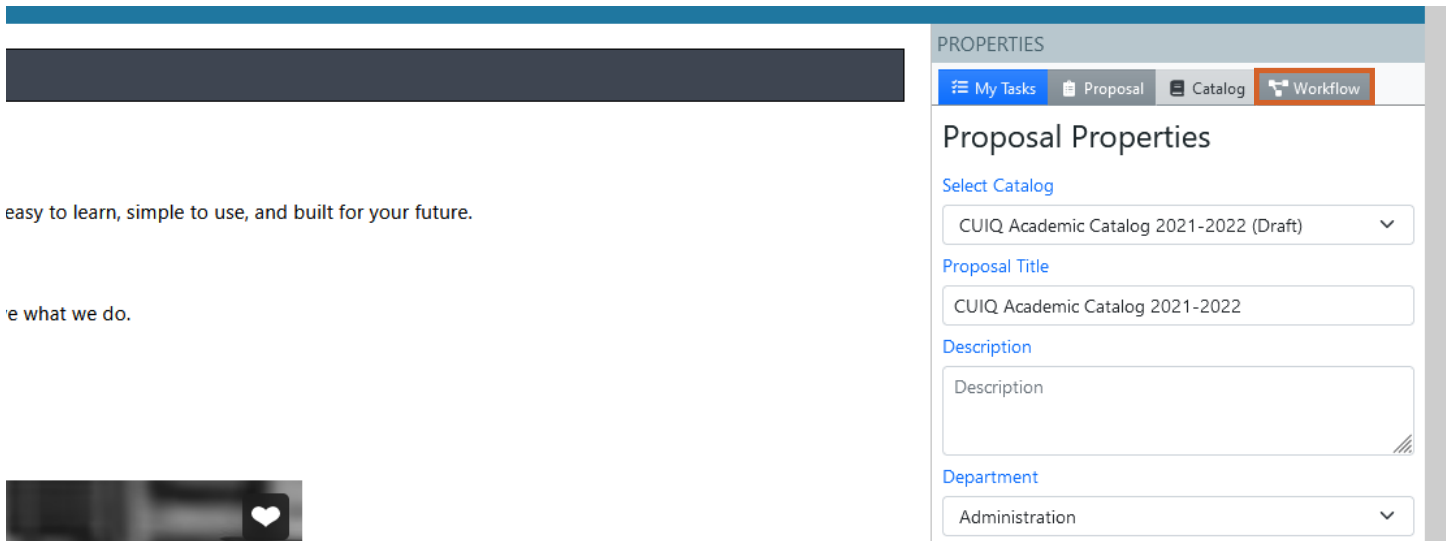
After you have submitted the catalog for approval, wait for it to launch. This may take a minute or two. While it is processing there will be a loading indicator on the right side of the **Submit for Approval** button.



# Submit Catalog for Approval - continued

## Workflow

When the catalog has launched, an additional tab will populate in the **Properties** sidebar - the **Workflow** tab.

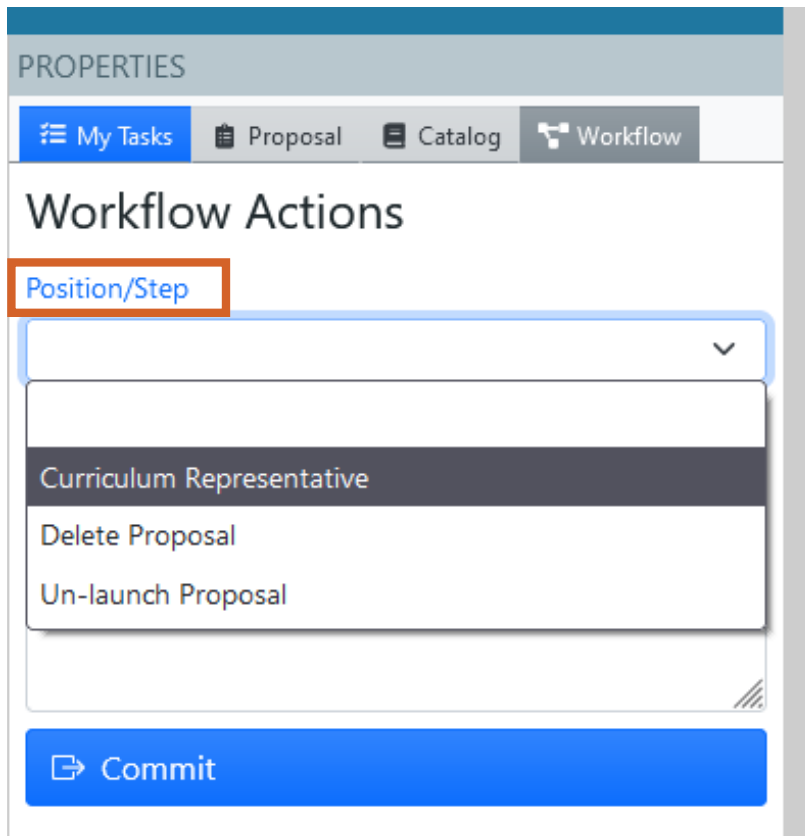



easy to learn, simple to use, and built for your future.

what we do.



 In the **Properties** sidebar, click the **Workflow** tab to access the workflow for the catalog.



 Choose a position or step from the **Position/Step** dropdown. The proposal can also be deleted or unlaunched from this dropdown if necessary.

## Submit Catalog for Approval - continued

### Workflow - continued

PROPERTIES

My Tasks Proposal Catalog Workflow

### Workflow Actions

Position/Step

Curriculum Representative

Action

- Approve; forward to Dept Chair (no DE)
- Request Changes
- Approve; forward to 508 Review (DE)
- Commit

Choose an action to take from the **Action** dropdown. Actions for a particular position may vary depending on the institution.

## Submit Catalog for Approval - continued

### Workflow - continued

PROPERTIES

My Tasks Proposal Catalog Workflow

### Workflow Actions

Position/Step

Curriculum Representative

Action

Approve; forward to Dept Chair (no DE)

Comments

This looks good

Commit

Commit the selected workflow action

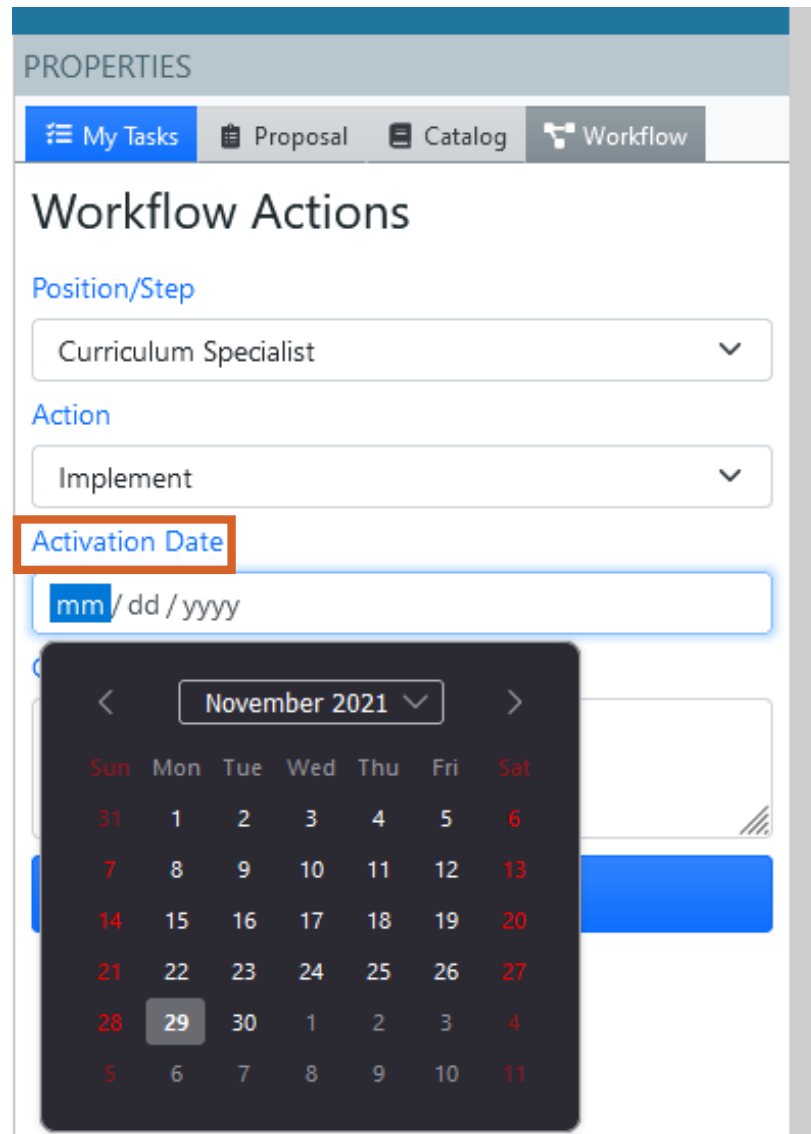


Any comments can be added in the **Comments** textbox. When you have chosen a position, added an action, and added any comments, click **Commit** to push the proposal to the next step in the workflow.

## Submit Catalog for Approval - continued

### Workflow - continued

When the catalog has reached the Implement step in the workflow, an activation date must be chosen.



The screenshot shows a web interface for 'Workflow Actions'. At the top, there are tabs for 'My Tasks', 'Proposal', 'Catalog', and 'Workflow'. Below the tabs, the title 'Workflow Actions' is displayed. Underneath, there are two dropdown menus: 'Position/Step' with 'Curriculum Specialist' selected, and 'Action' with 'Implement' selected. The 'Activation Date' field is highlighted with a red box and contains the placeholder text 'mm / dd / yyyy'. A date picker calendar is open, showing the month of November 2021. The calendar grid shows days from 1 to 31, with the 29th highlighted in grey. The days of the week are labeled at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat.

➤ Choose an activation date from the **Activation Date** datepicker. The activation date can be the current date or a date in the future.

## Submit Catalog for Approval - continued

### Workflow - continued

PROPERTIES

My Tasks Proposal Catalog Workflow

### Workflow Actions

Position/Step

Curriculum Specialist

Action

Implement

Activation Date



11 / 29 / 2021

Comments

This looks good

Commit

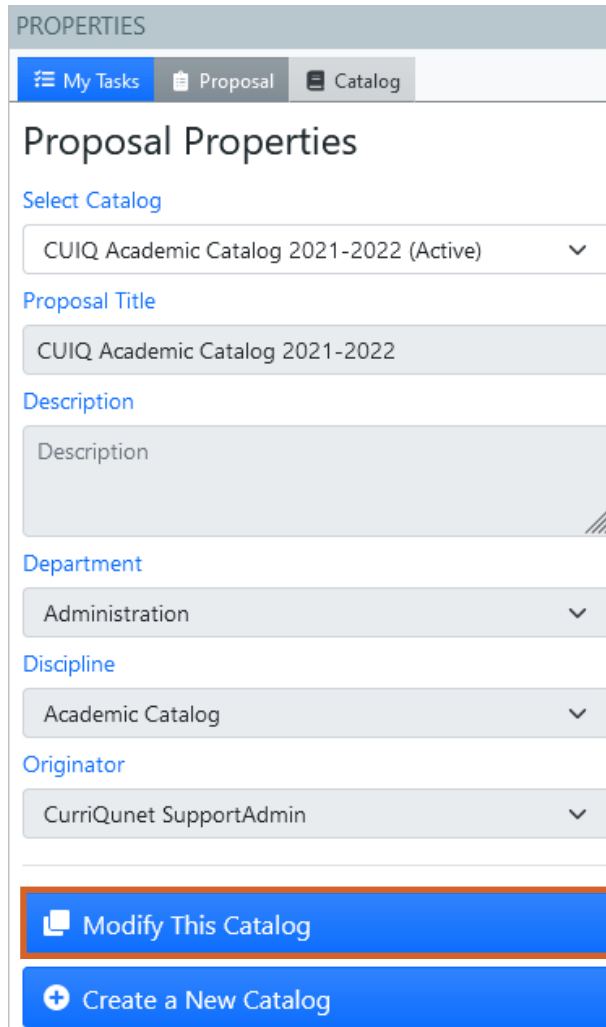
Commit the selected workflow action

  *The activation date can also be typed into the textbox. When you are finished selecting an activation date, click **Commit** to activate the catalog for public viewing on the selected date.*

In the next section we will discuss how to create a modification proposal for an active catalog.

## Create a New Modification Proposal

An existing catalog proposal can be modified from the **Properties** sidebar in the **Proposal** tab.



PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

Select Catalog

CUIQ Academic Catalog 2021-2022 (Active) ▼

Proposal Title

CUIQ Academic Catalog 2021-2022

Description

Description

Department

Administration ▼

Discipline

Academic Catalog ▼

Originator

CurriQunet SupportAdmin ▼

Modify This Catalog

Create a New Catalog

Click 'Modify This Catalog' to create a catalog modification proposal for an existing catalog.

**NOTE:** Just as with other proposals in META, direct editing of a catalog proposal should only be performed when a proposal is in draft or in review status and has not yet been launched or activated. If a catalog proposal is active and changes to it need to be made, creating a modification catalog proposal rather than directly editing the existing active catalog proposal is ideal in order to maintain a record of changes made.

## Create a New Modification Proposal - continued

There can be multiple draft, in review or historical proposals, but there can only be one active version of a catalog at a time.

Options at the bottom for the **active** proposal (1) include modifying it or creating a brand-new proposal. If a **historical** version (2) is selected, these two options do not show.

PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

1

Select Catalog

- CUIQ Academic Catalog 2021-2022 (Active) ✓
- CUIQ Academic Catalog 2020-2021 (Historical)
- CUIQ Academic Catalog (Draft)
- CUIQ Academic Catalog 2021-2022 (Active)

Description

Department

Administration

Discipline

Academic Catalog

Originator

CurriQunet SupportAdmin

Modify This Catalog

Create a New Catalog

PROPERTIES

My Tasks Proposal Catalog

### Proposal Properties

2

Select Catalog

- CUIQ Academic Catalog 2020-2021 (Historical) ✓
- CUIQ Academic Catalog 2020-2021 (Historical)
- CUIQ Academic Catalog (Draft)
- CUIQ Academic Catalog 2021-2022 (Active)

Description

Department

Administration

Discipline

Academic Catalog

Originator

CurriQunet SupportAdmin

## Create a New Modification Proposal - continued

Once a modification proposal is created by clicking 'Modify This Catalog' on the active proposal, a new draft proposal will appear in the **Select Catalog** dropdown with the same name and layout as the active catalog. Changes to all fields and pages can be made in **Edit Mode**.

When you are in a draft catalog proposal, the options at the bottom of the **Proposal** tab are now **Submit for Approval** (which launches the draft proposal into the workflow and should only be selected when the draft is completed) and **Delete This Draft** (which deletes the draft proposal without launching it).

The screenshot shows the 'Proposal Properties' form with the following fields and options:

- Properties Header:** My Tasks, Proposal, Catalog
- Select Catalog:** CUIQ Academic Catalog 2021-2022 (Draft) (highlighted with a red box)
- Proposal Title:** CUIQ Academic Catalog 2021-2022
- Description:** Description
- Department:** (Dropdown menu)
- Discipline:** (Dropdown menu)
- Originator:** CurriQunet SupportAdmin
- Buttons:** Submit for Approval (blue), Delete This Draft (red) (highlighted with a red box)

At the top of the screen, the **Proposal Title** (1) is now showing a status of (Draft), indicating that this catalog is a draft modification proposal rather than the active proposal. The **Catalog Title** (2) and **subtitle** (3) remain the same as the active proposal unless they are edited in **Edit Mode**.



## Create a New Modification Proposal - continued

Unlike a new catalog proposal, which is initially empty, a draft modification proposal will be a copy of the current active catalog, and all pages and content from the active catalog will already exist.

The screenshot shows the CurriQūnet Academic Catalog 2021-2022 (Draft) interface in Edit Mode. The main content area displays "About CUIQ" with a video player showing "curriQūnet Overview" and the text "CURRICULUM REPRESENTS THE HEART, THE FOUNDATION". The right sidebar shows "Proposal Properties" with fields for Catalog, Title, Description, Department, Discipline, and Originator, along with buttons for "Submit for Approval", "Delete This Draft", and "Create a New Catalog".

Changes can be made to existing content and new content can be added in **Edit Mode**. When finished, submit the modification proposal for approval and it will enter the **workflow** process (see pp. 62-67).

Once a modification proposal for the catalog has been implemented, the status of the previous catalog will go from **active** to **historical**, and the new modified catalog will become the **active** version.