META
Admin User Guide

Version 2.2 August, 2017

Contents

Welcome to META

currIQūnet META is a curriculum development, review, and approval system that addresses campus, statewide, and international collaborative issues in curriculum management and accreditation. META provides non-technical users the ability to configure and modify web entry screens and workflow templates.

Every institution develops unique curriculum management processes. This is true even where an institution is part of a regional or statewide system. META enhances and streamlines the user experience with customizable tools that are highly intuitive.

The core currIQūnet META System is designed to be configurable to reflect local requirements, while still properly interfacing components with upstream and downstream systems. This functionality includes local student systems, multi-campus curriculum searches, state reporting standards, and similar requirements.

META is a web-based application. Browser display variances may cause your screens to look slightly different from the screenshots in this guide. Supported browsers include Microsoft Edge, Google Chrome, Mozilla Firefox, and Safari. META is not currently optimized for mobile devices such as tablets and smart phones.

Your institution has one or more META administrators, usually located in the curriculum office. If you need additional assistance in using META, or have questions about the information required, please contact your administrators. Your META administrators are your best resource.

currIQūnet META allows each client to have customized workflows, and a secure, private database while maintaining a single codebase. This enables our implementation and support teams to focus on our clients while our development team constantly improves the product. The flexible nature of currIQūnet META means there is a nearly infinite combination of field types and functionalities to collect data in the format required. This guide will highlight specific field types and provide instruction on META specific features. Your institution may provide instructional materials that dive deeper into the specific proposal types you will encounter or include more specific instructions about the types of information they expect.

Accessing META

Your institution will provide you with the URL to access your META system. The URL generally follows the formula (institution name).curriqunet.com.

If your institution's META system is using a single sign on system, your log in screen will not look like the screenshot below, but will appear the same as the log in screens across your college's resources.
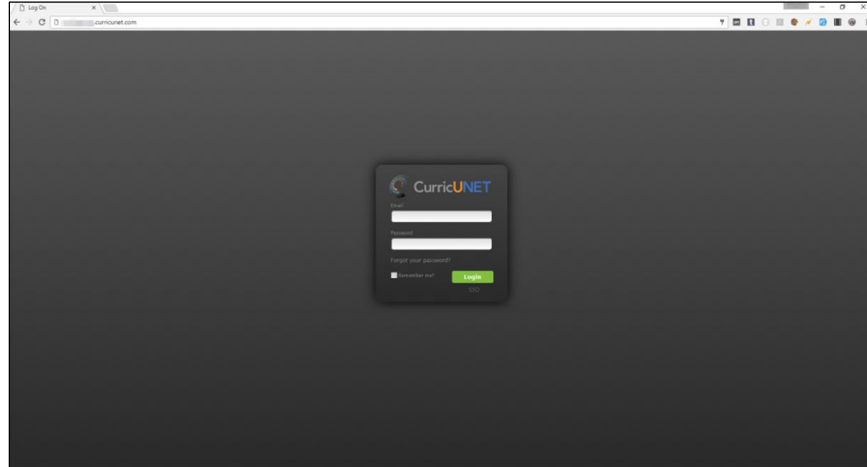
NOTE: From this point forward in this guide, screenshots will be focused on the particular areas and will no longer include the entire browser window.

Logging In

You will be provided with your log in credentials by the META administrators at your institution. You will log in with your email address (usually the address assigned by your institution), and will be given a temporary password. Upon logging in for the first time, you **must** change your password from this temporary password to protect your institution's data and security. If your college uses a single sign on system, you will receive instruction from your META administrators on how to log in.

Enter your email and password as shown below and click **Login** to begin working in META.

The landing page will always be the Course Search screen. There are several features available on the Course Search screen, described below.
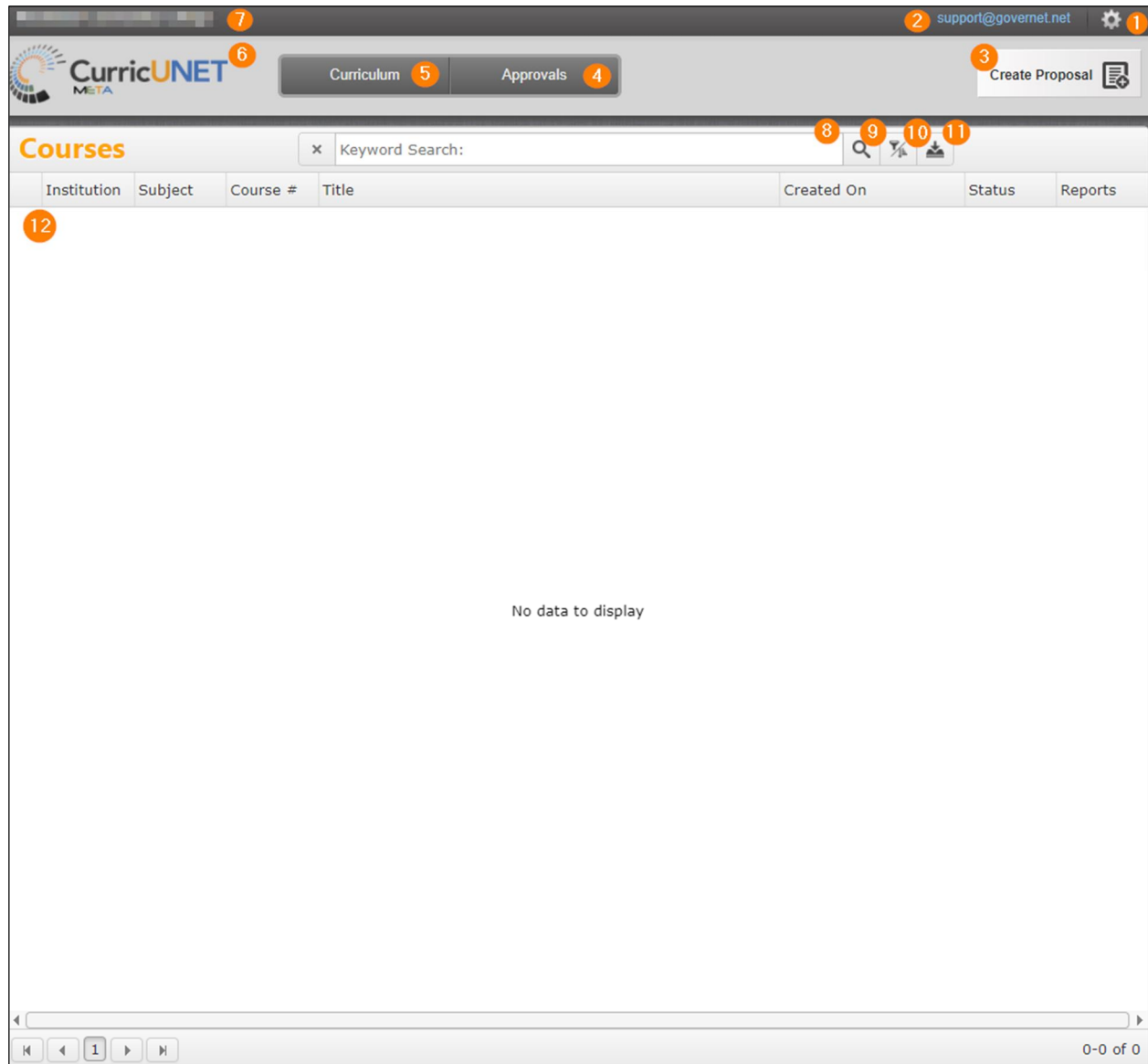
1. **Gear** icon. The Gear icon allows you access to the following functions:
    a. Edit your profile.
    b. Administer Site: (Site administration is detailed in the Administer Site section, page 76) This option will not be available for non-administrative users.
    c. Log Off
2. **User ID.** Your User ID is the email address you supplied when you set up your META account.
3. **Create Proposal.** This button will open the Create Proposal page.

4. **Approvals.** Allows you to view and search items awaiting your review in an approval process.
5. **Curriculum.** Allows you to view and search Course, Program, Package, Assessment, or Program Review proposals. Curriculum types may vary depending on institution configuration.
6. **META logo.** This is a link. Click on it at any time during your session to return to the Course Search page.
7. **Institution ID.** The name of the college or institution you are logged into.
8. **Keyword Search.**
9. **Search Button.**
10. **Search Filters.**
11. **Export Button.** This feature allows you to export your search results in Excel, Word, or PDF formats.
12. **Search Results Window.** Results of your searches will appear here. For instructions on how to use the search screens, see the **Searching Curriculum** section of this guide.

Profile Management

The first time you log in, you will need to check your user information to verify it is correct. To access **Profile Management**, click the **Gear** icon at the top right of your screen, and then select **Profile**.
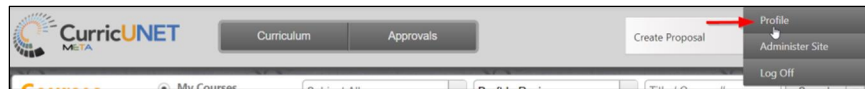
Verify that your information is correct, add or correct any necessary information, and click **Save**. Clicking **Save** or **Cancel** will close this screen and return you to the course search screen.

If your email address needs to be updated, please contact your institution's META administrators.

Changing Your Password

Unless your college uses a single sign on, you **must** change your password the first time you log in. You should also periodically change your password for security purposes. Navigate to the **Profile** area, as described in the previous section, and click the blue link, **Click here to change your password**.

Edit Profile

Account Info
Email   ashirley@   .edu

Password   Click here to change your password

Basic Info
First Name *   Anne   Last Name *   Shirley

Preferred Name Cordelia   Title

Phone
Business Phone   Ext.

Fax   Mobile Phone

Web Address

Save   Cancel

Enter your **Current Password**, then enter and confirm your **New Password**. Passwords must be at least 6 characters long, are case sensitive, and may include letters numbers, and symbols. Make sure your password is something you can remember. Passwords cannot be retrieved, but you may reset your password should you forget it.

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

Resetting Your Password

To reset your password, on the Log In screen, click **Forgot your Password?** Enter your Email as instructed, and click **Reset Password**. You will receive an email with instructions on how to reset your password.

NOTE: The password reset emails are included with general notification emails, and may not be sent immediately, depending on the notification configuration for your institution. If you do not receive a password reset email within 24 hours of your request, please contact your META administrator.

Troubleshooting

Many problems encountered with META can be resolved by simply clearing the cache on your internet browser. This is usually found under in the Settings menu in your browser. You can also use the keyboard commands, **Ctrl+Shift+Enter** (in Chrome), **Ctrl+Shift+Del** (in Firefox) or **Ctrl+R** (Microsoft Edge). If you use a different browser and are unsure of how to proceed, search your browser's Help menu for "clear cache." After clearing the cache, refresh the window. You may be logged out of META and need to log back in.

If clearing the cache does not resolve your issue, you may not be using the most recent version of the internet browser. In the Settings menu of your browser, check for updates. If you have the permission to do so on your computer, update your browser to the most recent version. You may need to log in again after updating.

Your META administrators are your best resource. Should you receive an error message of any kind, or the suggestions above do not resolve your issue, please inform your administrators immediately. They may be able to help you, or they may need to contact the currIQūnet support team to resolve the issue. To help resolve any issues, the following information can help expedite your issue:

- A screenshot of the error encountered, **including the URL** (this is very important!).
- The browser you were using, and if possible, the version of that browser (usually available in the settings menu for your browser).
- What you were attempting to do, including, (if possible), the exact steps you took that resulted in the error. Being able to reproduce the error is vital for the currIQūnet support team to be able to fix the problem.

Searching Curriculum

All screenshots in this guide will be from the course search feature, but the appearance and functionality is the same across all curriculum types. Depending on your institution's configuration, you may see more or less columns than appear in the screenshots of the search results, but your search filters and the functionality are as described.

Upon logging in, the default view will be courses in all statuses originated by the user. Proposals for which you are a co-contributor will appear highlighted green. After opening a proposal, the last proposal selected will appear highlighted blue.

Keyword Search

Enter search terms in the **Keyword Search** text box, (marked "1" in the screenshot below). Click the **Magnifying Glass** icon (🔍) to the right of the box to apply this term, or the **X** icon (×) to the left to remove the term. Only items that meet the criteria of both keywords and any filters applied will appear in the results.

The keyword option searches the hierarchy, proposal title, and proposal description. The search engine will search for the exact phrase entered, including any spaces or numbers. Adding a

comma between keywords will add an implicit "or" to the search. For example, "cell biology" will search for the exact phrase, "cell biology." On the other hand, "cell, biology" will search for all proposals that include the word "cell" or the word "biology" in their hierarchy, proposal title, and proposal description.

Filtering Search Results

Add filters to your search results by clicking the **Search Options**, ( ), marked "1" in the screenshot below.

After clicking the icon, a window will open for you to select any applicable filters. Multiple filters may be applied from this window, as highlighted by the numbers in the screenshot below.
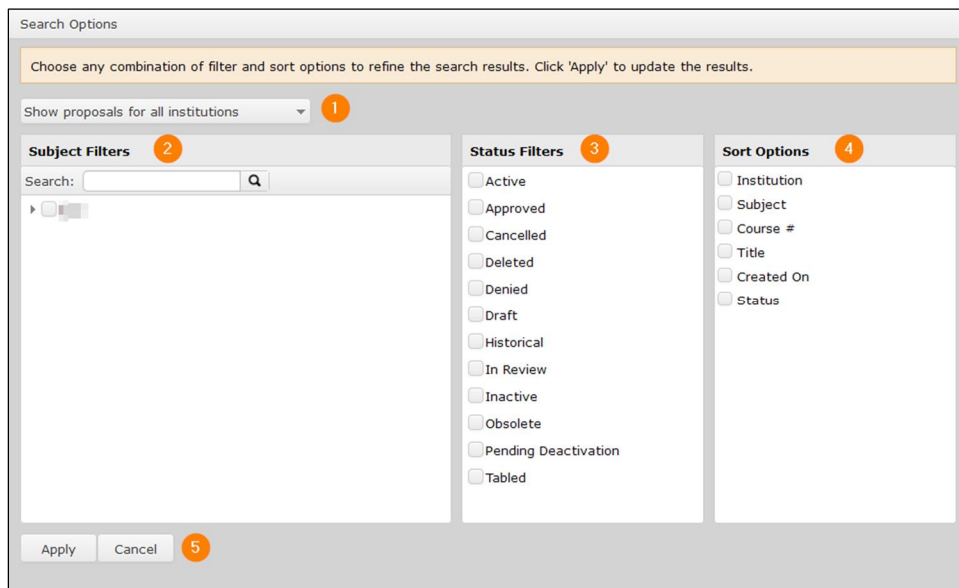
Scope Filter

Use the **dropdown menu** (1), to select the scope of the search. Only one filter from this menu can be applied to a search at a time.

Filter options include:

- **Show only my proposals:** Only proposals meeting the other search criteria originated by the user will be returned.
- **Show all proposals for my institution:** All proposals at the institution meeting the other search criteria will be returned.
- **Show proposals for all institutions:** For clients with district configuration *and* when the user has roles at more than one institution in the district, all proposals at all institutions where the user has roles will be returned.

Hierarchy Filter

The **Hierarchy Filters** (2) vary by curriculum type. Filter courses and packages by Subject. For all other curriculum types, such as programs, you will filter by Department or Division. Hierarchy options are collapsed under the institution title. To expand the hierarchy options, click the **Arrow** icon to the left of the institution, or click the checkbox by your institution title to include the whole institution in your search.
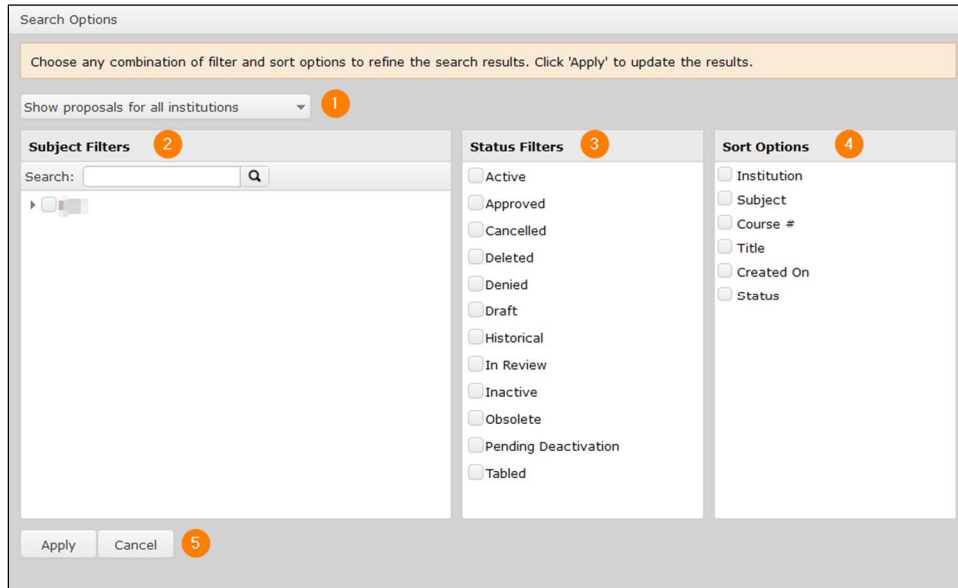
Select any categories to include in the search. To include all hierarchy groups in your search, select either *all* or *none* of the checkboxes.
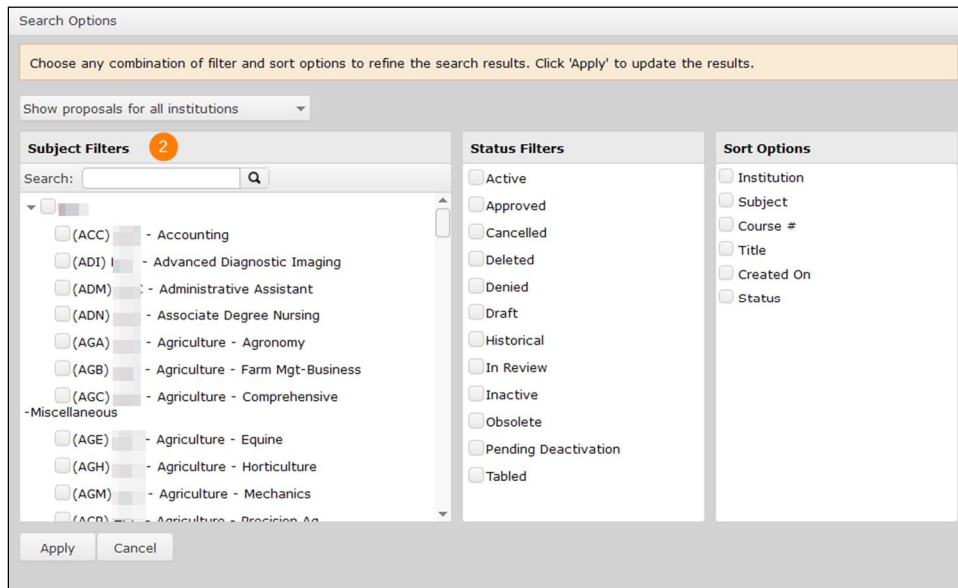
Status Filter

Select any proposal statuses to include in your search from the **Status Filters** checklist (3). Your institution may have different statuses than shown here. To include all statuses in your search, select either *all* or *none* of these checkboxes.

Sort Options

To sort the search results, select from the **Sort Options** (4) checklist. Items in the search results will sort in descending order based on the columns selected. Click the checkbox labeled what to sort in ascending order. Sort options can be drag and dropped to prioritize the sort order.
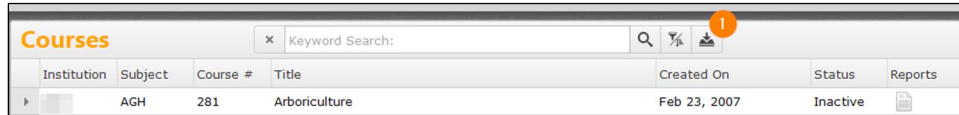
Apply/Cancel Search

To apply the search criteria selected in the Search Options window and view results, click the **Apply** button (5). To close this window without making changes to the search criteria, click **Cancel**.
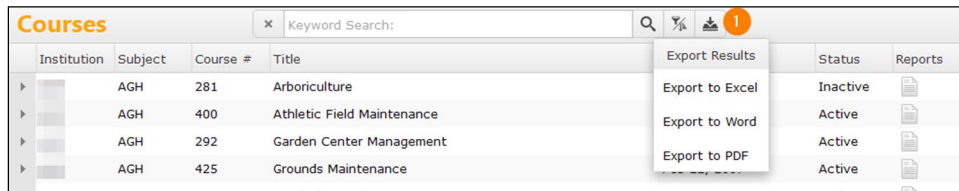
Using Search Results

Search results can be exported to several formats for review offline. Select the **Export** icon (⬆) to download the document.
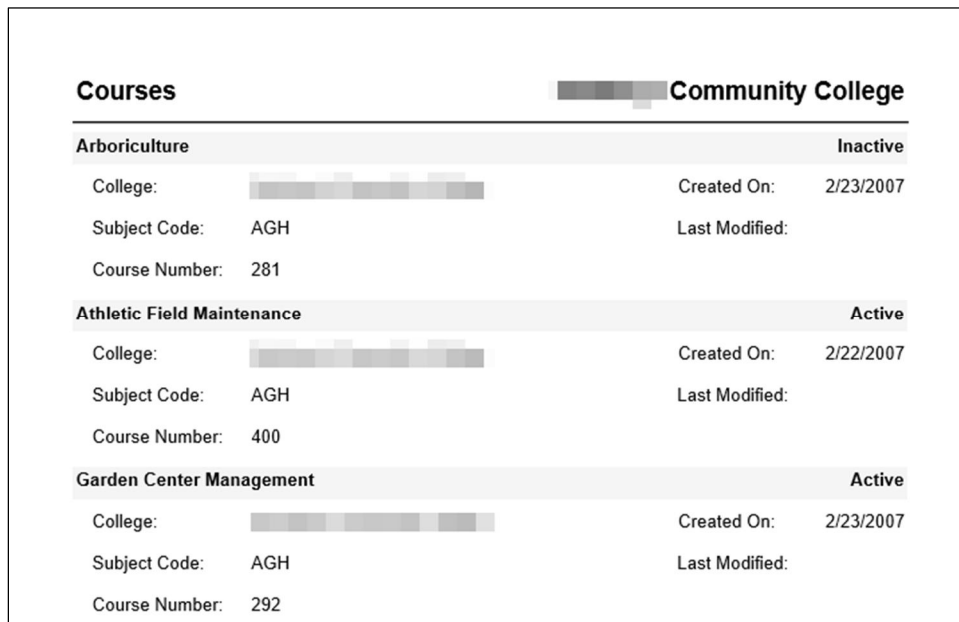
Select the file format from the dropdown menu.

A file in the specified format will download to your computer with the search results in a table format, as seen in the example below. You may need to authorize the download.

Get additional information about the proposal in the search results screen by clicking the arrow to the left of the proposal title (1).

This will open a summary of the proposal with additional identifying details. Click the arrow again to close the summary. You can view multiple summaries simultaneously.

Search results are paginated to more easily access results. Navigate between pages using the navigator at the bottom of the screen, marked "1" on the screenshot below. The result range, marked "2" in the screenshot below, indicates the visible proposals and the total number of proposals that meet the search results.

Creating and Viewing Curriculum

Click the **Curriculum** button on the META home screen.

A dropdown menu will appear with the following options: **Course**, **Program** and **Assessment**. Click the desired option to proceed. Curriculum options are explained below, although the process is similar with all three options.

Course

New Courses

To create a new course proposal for a course that has not previously been offered, click **Create Proposal.**
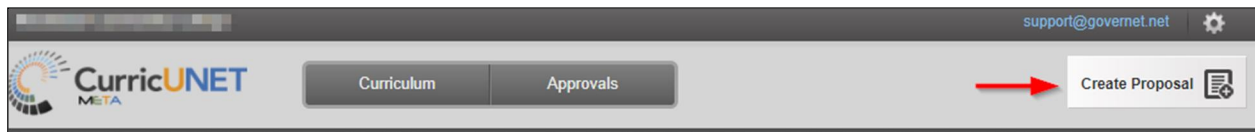
Select new course **Proposal Type** from the dropdown menu and click **Next**.

Complete all fields to create the proposal and click **Next**. If you need to select a different proposal type, click **Previous. Do not use your browser's back button.**

Confirm that the information entered is correct, and then click **Create Proposal.**

A new proposal will be created. Complete the proposal, selecting each dark gray tab on the left to navigate between sections of the proposal. For additional details on proposal function, see the **Proposal Functions and Features** (page 50) section of this guide. When the proposal is complete, click **Launch** to move the proposal into the approval process.

New Course: ACC 718 - Adventures in Accounting Research

Status: Draft

Remaining Launch Requirements: 4 | Launch | Delete Draft

Proposal Resources

Cover 5/8
Co-Contributor
Units/Hours
Course Objectives
Requisites
Content Review
Entrance Skills
Course SLO
Course Content
Methods of Instruction
Methods of Evaluation
Sample Assignments
Course Materials
Additional Resources
Library

Proposal Resources

1. Curriculum Website
2.
3.
4.
5.

Fields marked with * are required

Modify or Deactivate Courses

To create a modification or deactivation proposal for an existing course, click **Create Proposal.**
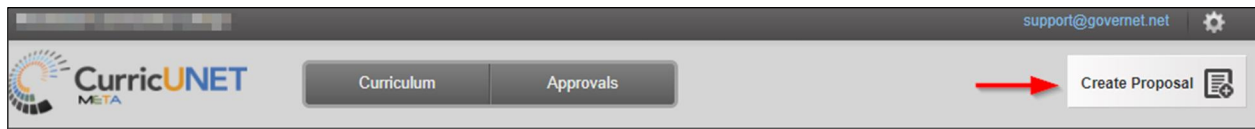
Select the modification or deactivation **Proposal Type** from the dropdown menu and click **Next**.

Use the dropdown menu to choose the **Subject and/or e**nter any search terms related to the **Course Title** you are searching. If you do not know the title, click the **Search** button after making the **Subject** selection.

When you select the **Search** button, you will see a list in the **Course Search Results** textbox for that subject. It may be necessary to use the scroll bar to view all options. Mandatory fields are marked with an asterix (*). Click the course to be modified. The title will be highlighted blue. Click **Next**.

Confirm that course selected is correct, and then click **Create Proposal.**

A proposal of the new course version will be created. Complete the proposal, selecting each dark gray tab on the left. For additional details on proposal function, see the **Proposal Functions and Features** section of this guide. When the proposal is complete, click **Launch** to move the proposal into the approval process.

Program or Degree

To create a proposal for a new degree, click the **Create Proposal** button on the home screen.
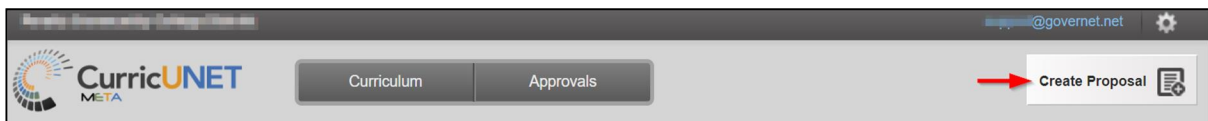
From the dropdown menu (1) select the **Proposal Type**, for **Courses**, **Programs**, **Assessments**, or **Program Reviews**. You may also type keywords in the textbox (2) to narrow your search options.

Click the **Next** button when complete.

Work your way through the dialogs. Items marked with an asterisk (*) are required. As you complete each step, click the **Next** button. At any time, if you wish to make changes to a previous step, you may go backstep using the **Previous** button.

Once the proposal has been created, you will be taken to the Draft Proposal Form, shown below.

The parts of the **Cover Page** include the **Draft Status** (1), the remaining **Launch Requirements** (2) and the individual **Sections** of the proposal (3). **Badges** (also 3) indicate how many items in each section exist, and how many need to be completed in that particular section. When all items are completed, the badge will change from yellow to green. The number of remaining launch requirements will also change accordingly.

When completed, you will be able to launch or delete the proposal.

New Programs

Creating a new program proposal requires the same steps as creating a new course proposal. To create a proposal for a new program, click the **Create Proposal** button on the home screen.

1. Select the type of Program you desire. Click the **Next** button.
2. Complete the **Minimum Requirements** page. Click **Next**. Review the **Proposal Summary**, and if it is correct, click Create **Proposal**.
3. From there, complete the **Draft Proposal Form** as you would for a degree proposal.
4. When finished, you may **Launch** or **Delete** the proposal draft.

Modify or Deactivate Programs

To modify or deactivate a program, begin by clicking **Create Proposal**.

From the **Proposal Type** dropdown menu, select the option you desire (**Deactivation**, for example). Depending on your institution, there may be a variety of modifications or deactivation types.

Click **Next**.

From the Minimum Requirements window, choose the Subject, and Course Title.

META will display a list of courses that meet your search criteria.

Select a specific course and click **Next**. META will display the **Proposal Summary**.

 If you are satisfied with the proposal, click **Create Proposal**. META will display the **Draft Proposal Form**. If not, use the **Previous** button to back up and make changes.

Review the **Draft Proposal Form.** You are able to modify items in the text entries if necessary. When you are satisfied with the proposal, click the **Launch** button. Otherwise, click **Delete Draft**.

Cloning

What is Cloning?

Cloning is an optional META feature that must be requested by Admin users.

The process of cloning is actually the extraction of the data in an existing proposal (either a course or a program proposal) into a new proposal. Cloning is different than simply copying an entity. Copying an entity simply creates another instance of that entity. Cloning creates an entirely new entity.

Cloning a Proposal

Log in to META as you normally would.

On the META homepage, click the **Create Proposal** button.

On the Create Proposal Page, select the **Proposal Type** you wish to create.

Click **Next**. This will take you to the Minimum Requirements Page. Click the **Find Proposal** button. Note, you can only clone proposals which are set up for cloning. If the **Find Proposal** button does not appear, the proposal you have selected is not set up for cloning.

In the **Search Proposals Window**, choose the desired subject from the **Subject Filter** dropdown menu.

META will display a list of course proposals. Choose the proposal you wish to clone from this list, and click **Select Proposal**. Make sure you are selecting an active proposal, not a draft. META will then populate the data into the minimum Requirements fields. Click **Next**.

From here you will be taken to the Proposal Summary. Note that the proposal information has been filled in with data from the proposal you have cloned.

If your chosen course is active, you may need to choose a different course number to differentiate it from the original course. In this case, you will see the following warning in the bottom of the Minimum Requirements window:

In this case, change the **Course Number** appropriately, and click **Next**. You will be taken to the Proposal Summary page. If the information on the summary page is correct, click **Create Proposal**. If not, use the **Previous** button to return to the appropriate step and make corrections. Do NOT use your browser's **Back** button.

Click **Next**. You will be taken to the Proposal Draft Form.

Complete the newly-cloned proposal as normal, and launch or delete the draft.

Packages

A package bundles draft Course and Program proposals into a single proposal so that all items work through the approval process together and activate at the same time. You may have multiple package proposal types that follow different workflows, such as one for new curriculum, one for modifying curriculum, and one for deactivating curriculum, or proposal types for different combinations of curriculum, like all courses, all programs, or courses & programs).

New Package

Before creating a Package you will need to make sure that all of the courses/programs that you will be adding to the package are in "draft" status. If you are creating a new course/program, then create those proposals first, before creating the package, and then leave the courses/programs in "draft" without launching them.

To create a Package, you will use the same process as for courses and programs. Select **Create Proposal** from the top of the META screen. Scroll down to the **Package proposal types** and select the package proposal type.

The **Subject** you select in Step 2 of the Creation screens determines which people this package will go to in the Approval Process. The **Package Title** is the name you are giving this particular package, and **Catalog Description** is a summary of what changes or new items the package contains.

Once inside the Package screen you will see the information you entered on the **Cover** page. You will have links two other pages: one for adding **Courses** and one for adding **Programs**. Both the Course and Program pages function similarly. These are multi-select lists that allow you to check the items you need. You can either scroll up and down the list with the scroll bar, or just start typing the item you are looking for in the search box. Users are able to make multiple selections on both the Course and Program pages if necessary. After you have made selections and saved the pages select **Launch** from the upper right corner, just as you would for any other proposal, to launch this Package into the Approval Process.

Generally a package has only three tabs: a **Cover**, which usually includes space for the rationale behind bundling the proposals; a **Courses** tab, which will have a multi-select list for adding draft course proposals; and a **Programs** tab, which includes a multi-select list for adding draft program proposals.

After clicking launch make sure to select "OK" on the confirmation pop up.

Assessments

The Assessment page displays a list of **Assessments** and their status. Click an item in the list to be taken to its page.

New Proposal

To create a **New Proposal**, select the **Create Proposal** button.

Choose your **Proposal Type** from the drop down menu, and then click **Next**.

For a **New Course Proposal** use the dropdown menu to choose the **Subject**, and then provide the **Course Number**, **Course Title** and **Catalog Description** of the new proposed course. Click **Next**.

Program Review

From the META home screen, click the **Curriculum** button. From the dropdown menu, choose **Program Review**.
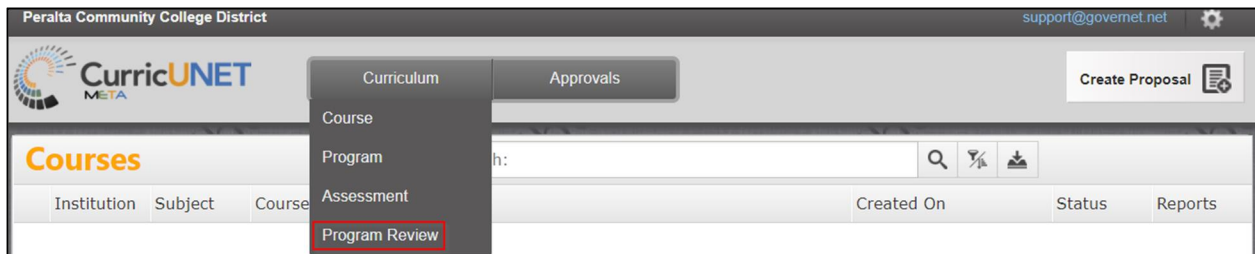
If the resulting page is blank, with the "No data to display" notification, click the filter button () to the right of the dropdown menu. This will take you to the **Search Options** window.

From the Search Options Window, choose the options you desire, and how you wish them to be sorted. Click the **Apply** button to return to the **Program Review** page.

Click on the arrow next to each proposal to view its details.

You may also use the Export button (⬆) to export a report to Word, Excel, or PDF.

Clicking the Program Title will open the Proposal in a new tab. From here the draft may be edited, launched, or deleted.

Accessing Reports

You can export your search results as a report that may be saved, printed, and shared. Click the **Expand Arrow** on the **Search** button to display your export options. Select the output format you desire from the dropdown that will appear. A report can take up to a few minutes to generate and download, depending on the format chosen and the number of courses in the report.

In the **Search** screen, click the **Page** icon (📄) in the **Reports** column. Click on the icon again to close it.

A menu will appear with the report options. Select the report you wish to view.

When in the proposal itself, click the **Page** icon under the proposal name.

If a proposal has been launched or approved, clicking the proposal name in the search results will present this screen. Select the report you wish to view from the buttons at the top of the screen.

Course Reports

Standard course reports include the **Course Outline**, **Impact**, **All Fields**, and **Comparison** reports. Your institution may have additional or different reports, or may have customized these reports.

Course Outline

The Course Outline report is a summary of the course. A completed outline should include the course name and number, credit hours, requisites and prerequisites, a description, and student outcomes.

COLLEGE COMPOSITION

Course Number: ENGL 001

Credit Hours: 4.00
  Lecture: 4.00 hours
  Lab: 0.00 hours

Prerequisite: A high school GPA of 2.7 or better; OR a "B" or better in Junior or Senior High school English; or a "C+" or better in AP English; or a score of 90 or better within on the sentence skills section of the assessment test; or SAT verbal score of at least 500; or ACT score of at least 23; or a grade of "Pass" in ENGL 370 or 348E or 380 or 348G or 360; or recommendation of a counselor or English instructor based on a Multiple Measures Evaluation; or concurrent enrollment in English 348D or 310D

Corequisite: LR 010

Advisory: None

Other: None

Description: A writing course which emphasizes critical reading, expository and argumentative writing, and mastery of library research techniques. It includes instruction and practice in critical thinking, in analytical reading and evaluation of written work, and in the methods of clearly communicating and supporting ideas in organized, coherent essays (min 750 words each). Students are required to write an average of 7500 formal words, including a research paper, based on essays, literature read in class, personal experience, and college-level research.

Student Learning Outcomes:
By the end of this course, a student will be able to:

1. Identify and evaluate main ideas, themes and logic in college-level reading, and use as the basis for text-based essays.
2. Write logical, effective analytical essays which are coherent, well-organized, and well-supported.
3. Apply proper methods of research and documentation.

Lab Content:

1. Assist students in the writing of complete compositions through general instruction in the discovery and limiting of subject, the definition of purpose and identification of audience, the development of the topic, the grouping of ideas, the development of the thesis, and the final organization of the essay. The reinforcement of the general principles of essay writing will be accomplished by instruction in the following:
   a. The Informal Essay

Impact Reports

The Impact report is only for modification and deactivation proposals. This report lists the courses for which this course is a requisite, and the programs to which the program belongs.

Proposal Impact Report

ENGL 001 - College Composition
Modified Course Proposal

Course Requisites

This course is a requisite for the following course(s):

1. **Advisory:** ART 011 - Survey of Modern Art *Active*
2. **Advisory:** ART 012 - Inside/Outside: The Cultures and Identities of Diverse Visual Artists in the U.S. *Approved*
3. **Advisory:** ASTR 045 - Introduction to Astrobiology and the Search for Life in the Universe *In Review*

Programs

This course is a stand-alone course and is not incorporated into any programs

Generated on: 6/20/2017 10:10:25 AM

All Fields

The All Fields report includes every field on the proposal. This is useful for gaining a quick overview of the proposal, as well as being able to check specific details at a glance.

Reports

- All Fields
Course Report

Cover

Department ENGL
Course Number 001
Full Course Title College Composition
Computer Title College Composition
Has the Impact report been ran? No
☐ Add Cross Listed

Will this course be part of a program? Yes

Program Information 1 - Program Applicable

CB03 TOP Code 1501.00 - English Language and Literature, General
CB09 SAM Code D - Possibly Occupational
CB11 California Classification Codes A - Liberal Arts and Sciences
☐ Open Entry/Open Exit

Comparison Report

The Comparison report is only for modification and deactivation proposals. Like the All Fields report, this report includes every field on the proposal, with changes made to this version of the proposal highlighted. Deleted information will be highlighted pink, with a strikethrough the words, while new information will be highlighted green and italicized.

- All Fields
Course Report

Cover

Department ENGL	

Course Number 001

Full Course Title College Composition

Computer Title College Composition

Has the Impact report been ran? No

☐ Add Cross Listed

Will this course be part of a program? Yes

Program Information 1 - Program Applicable

CB03 TOP Code 1501.00 - English Language and Literature, General

CB09 SAM Code *D - Possibly Occupational*
~~E - Non Occupational~~

CB11 California Classification Codes A - Liberal Arts and Sciences

Program Reports

Standard program reports include the **Program Summary**, **All Fields**, and **Comparison** reports. Your institution may have additional or different reports, or may have customized these reports.

Program Summary

The **Program Summary** shows a summary of the program.

Package Reports

There are no package-specific reports. However, by clicking the course or program title that has been selected, in the proposal, you can view the reports from the curriculum item itself.

Assessment/Program Review Reports

Assessment and Program Review proposals reports include only the **All Fields** report. The All Fields report includes every field on the proposal. This is useful for gaining a quick overview of the proposal, as well as being able to check specific details at a glance.

███ ██ ███ - All Fields Module Report

Main

Assessment Type: Course SLO Assessment

Subject Art	

Choose Active Course ART 046A - Beginning Ceramics I	

Choose Course Version ART-046A - Beginning Ceramics I (Existing - Current)	

Choose Course Outcome	Critique ceramic works using appropriate terminology to evaluate forms, design process and design elements.

Originator ██████	

Department ARTDEPT	

Semester Fall	

Year 2016	

Instructions for Generating the Display title

1. Fill out the form to this point and then Save
2. Copy the truncated outcome text from the **Short Title** field below
3. Paste the truncated outcome text into the text box below the Short Test Field
4. If there will be others contributing to this proposal then select the appropriate users from the **Contributor** list below, if not skip this step
5. Save the page again

Critique ceramic works using appropriate terminology to evaluate forms, design process and design elements.

Contributor

Co-Contributor

```
                    Course Outline of Record          First Date of Approval
                                                      Revision Approval
                                                      Date
                                                      ████ Approval
                                                      Date
                                                      Effective Term:        Winter, 2016

        1. Course Discipline and Number: ARTH1-UC 2216
        2. Course Title: History
        3. Units:
           Lecture Units:
           Lab Units:
        4. Catalog Description:

                   This is the description for History.

        5. Instruction Methodology:
        6. Lecture Hours:
           Lab Hours:
           Total Contact Hours: 0
        7. Grading: Graded
        8. Course Prerequisite:
        9. Course Corequisite:
       10. Course Recommendation:
       11. Repeatability:
       12. Transfer Status:
       13. Learning Outcomes:
               a. SLO
       14. Course Lecture Content
           Course lecture
       15. Course Lab Content
       16. Methods of Evaluation
               a. Essays

           Critical thinking example(s):

       17. Textbooks
       18. Assignments

           Critical thinking example(s):

                                                      Generated on: 2/3/2016 10:34:53 AM
```

Program Reports

All Fields

An **All Fields** report shows all the fields and information in the proposal.

- All Fields Program Report

Main

Program Information

| Award Type | M.S.: Master of Science |

| Degree/Certificate Name | Master of Science in Human Resource Management and Development |

| Department | Leadership and Human Capital Management |

Rationale for Proposing New Program

Educational and Career Objectives

Relationship to the mission of the school and university

Proposed Effective Date

| Year | 2005 |

| First Semester Intended to Offer | Spring |

Co-Contributor

Co-Contributor

Co-Contributor

Description

Catalog Description

Course Blocks

Course Block Definitions

Program Goals and Outcomes

Outcomes

Program Review and Assessment

Description of Periodic Program Review and Assessment Plan

Program Summary

The **Program Summary** shows a summary of the program.

PUBLISHING 1

ASSOCIATE IN ARTS

Program Learning Outcomes

Upon successful completion of this program, students will be able to:

1. They will be able to do this.
2. The student will be able to write this.

Degree Requirements:

ARTS1-UC5414   The Arts: Photography: The World Through the Lens
or
BUSN1-UC0174   Budgetary Process

Generated on: 2/3/2016 10:51:13 AM

Comparison Report

For **Program Amendment** or **Program Deactivation** proposals, a **Comparison Report** will show all fields and information in the proposal, with changes between this proposal and the most recent previous version of the program highlighted. Information removed will be highlighted pink with a strike-through, and information added will be highlighted green and italicized.

[blurred] - All Fields Program Report

Main

Program Information

Award Type	G.C.: Graduate Certificate
Degree/Certificate Name	Graduate Certificate in Peacebuilding
Department	*Center for Publishing* ~~Center for Global Affairs~~

Rationale for Proposing Changes to Program

rationale

Educational and Career Objectives

Educational

Relationship to the mission of the school and university

Relationship

Proposed Effective Date

Year	2013
First Semester Intended to Offer	Fall

Launching Curriculum into the Approval Workflow

Once you have entered all necessary data and completed all required fields, click the **Launch** button at the upper right of the proposal screen. This submits the proposal to the approval process. META will send an email notifying the person or people assigned to the first level of the workflow that there is a proposal waiting for their review.

Proposal Functions and Features

If you are familiar with web-based applications, you will find currIQūnet META easy to use. The flexible nature of META means that there numerous combinations of field types and functionalities to collect data in the format required. This guide will highlight specific field types and provide instruction on META-specific features, but does **not** instruct you on the step-by-step process of creating curriculum. Your institution may provide instructional materials that dive deeper into the specific proposal types you will encounter or include more specific instructions about the types of information they require.

Navigating Proposals

Move between the sections of the proposal by using the **dark gray tabs** on the left of the page. Any required fields throughout the course proposal will be marked with an asterisk (*) and highlighted light orange or blue. Sections with required fields also have an orange or blue box showing your progress (3/4), which will turn green (4/4) when you have completed all required fields. You will only be prompted to save when changes are made.

NOTE: Some clients will have an informational landing page that includes links to resources and contact information for the local admins. Some have extensive instructional text on that page. Your cover page may or may not, depending on your institution.

Saving

When changes are made, it is important to click the **Save** button to commit your changes. In case information previously entered needs to be updated or corrected, **DO NOT** use your browser's back button. Instead use the **Back** button in the META window. Select the **Cancel** button to undo your changes.

Proposal Resource Page Example

The **Proposal Resources** page provides links to this manual and the admin manual as well as contact information for currIQūnet support at your institution. For questions concerning the currIQūnet system, refer to these resources.

Dropdown Menus

Use the down arrow on the right side of the textbox to display the dropdown menu to view your options.

Click on the option to select it.

Text box/Text Area

Put your curser into the textbox and enter information directly into the text area. Once you have finished entering in the applicable information, click **Save**.

Date Fields

To select a date, either use the **Calendar** icon (▦) or type in the date using the format **M/D/Year**.

When you click on the icon a popup of a calendar will appear, use the left and right arrows next to the month's name, to browse for another month.
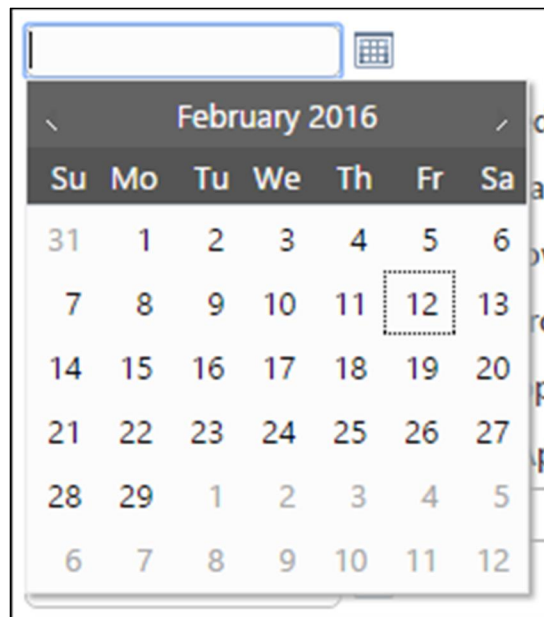
Attach Files

In the **Attach Files** section, you may attach files for additional documentation or support of your proposal. Use the **Select…** button to find files. Navigate to where your files are stored, select them, and then click **Upload Files** to attach them.

Checkbox

Checkboxes are used when selecting a single option for an item.

Checklist

A checklist is a list of items where you may select multiple items. **Methods of Instruction** is an example of a checklist you will commonly encounter.

Repeater Checklist

A Repeater is a special kind of checklist. When items in the checklist are selected, additional fields appear requesting information about that selection. A common use for this function is course general education, where the user indicates which general education areas this new course will meet. Each selection will trigger a hidden field to appear, requesting a justification for this classification.

Multi-Select Lists

A multi-select list presents a very long checklist in a condensed, searchable format. You may scroll down to find the item you are looking for, or type the first few letters of the item you are looking for in the search box (indicated by the red arrow) to filter and shorten the available list. Click the checkbox next to each applicable item (outlined in red below). Select as many items as required. If you check the Show Selected box, you will see only the items you have selected. Click **Clear All** to start over with your selections.

Grids aka Textbooks/Course Materials

Click **Add New Record** under the appropriate category to add materials to the course proposal. Add each item separately.

Select the **Insert** button. This will open an area to describe each material.

To create a list of requisites, click the **Add New Item** button.

Next, choose the **Requisite Type** by clicking the dropdown arrow on the right side of the textbox to view your options. If the requisite is a course, select **Subject** and **Requisite Course** from the subsequent dropdown menus. If the **Requisite** is not a course, describe that information in the **Non Course Requirements** field.

The **Condition** dropdown selector is only used if an "**or**" situation or a "**nesting**" situation applies, otherwise it is implied that an "**and**" statement exists between entries. The **Condition** dropdown menu allows you to specify if this course must be taken as well as (using "**and**"), or instead of (using "**or**") the next requirement. Click **Save** to add the requisite to the program.

Requisite Condition and Type are illustrated below.

As you enter and save each entry, you will see a screen similar to the one below. Edit, re-order, and delete items as you did on the SLO page.

Student Learning Outcomes

Student Learning Outcomes often uses an Ordered List feature. To use this tool, first click **Add New Item**. Each outcome needs to be added individually.

Enter the information for each item and click **Save** after each entry.

NOTE: When you see text boxes highlighted in pink they are "save requirements." These differ from "launch requirement," because these are not necessarily required to launch the proposal, but these are required to save an item to the proposal. As shown in the example below, if you enter a **Student Learning Outcome** (SLO) you must also enter the **Proposed Method of Assessment** for that specific SLO.

Some Institutions will have the option to map course SLOs directly to Individual Learning Outcomes (ILOs). This is normally only done for stand-alone courses or for institutions that do not map their SLOs to their Program Learning Outcomes (PLOs) directly. If this is an option, users can indicate by checking the appropriate checkboxes as to which ILOs an SLO maps to. You can select multiple checkboxes.

When you have entered and saved the SLOs, you will see a screen similar to the one below. To edit a Student Learning Outcome, click the blue bar containing the outcome. You will be taken back to the detail page where you are able to make the changes. To re-order outcomes, use the up and down arrows to the right of the blue bar. Click the red **Delete** icon (⊗) to delete individual outcomes.

Condition

The **Condition** dropdown selector need only be used if an "**or**" situation or a "**nesting**" situation applies, otherwise it is already implied that an "**and**" statement exists between entries.

The **Condition** dropdown menu allows you to specify if this course must be taken as well as (using "**and**") or instead of (using "**or**") the next requirement.

Course Blocks

Course blocks are nested ordered lists that hold the requirements for a program. The first level indicates categories of courses for the program, which may include Program Prerequisites, Core Courses, or Electives. Within each of those categories, the user will assemble the courses that will meet that requirement.

Content Review

To review the content, click **Add New Item**.

Use the dropdown menu to choose the **Requisite Course** and **Content Review Type**.

Objective and Content Mapping

To map this courses objectives to a requisite course's objectives, select the **Content Review Type,** "**Objective To Objective**" from the **Content Review Type** menu. Select the current course objectives and the corresponding requisite course objectives from the check lists that will appear.

NOTE: Both courses must have objectives saved for items to appear in checklist.

Functions and Features

Objective to Content

To map this course's objectives to items in a requisite course's content, select **Content Review Type** menu, and then "**Objective to Content**." Select the current course objectives from the check list that will appear, and enter the information from the requisite course's content in the text area.

NOTE: The current course must have objectives saved for items to appear in checklist.

Read Only Fields

If at any point you are unable to click into or make changes to a field's information, you do not have edit privileges for that field. If you need to make changes to such a field, contact your institution's currIQūnet administrators.

Auto Calculations

Some institutions have automatically calculated fields on their Units/Hours pages. When users enter the base measurement into the white numerical fields the grayed out fields will automatically calculate.

Show/Hide Pages

Show/Hide pages are used in areas where additional information is required because the proposal meets certain criteria. Responses on a field of any type may cause additional fields to appear.

Most frequently, the trigger field and the unlocked fields will be on the same proposal page. For example, on this proposal page, the user is to indicate that a list of materials to support the course has been provided to library staff.

When a user selects this checkbox, an attachment tool appears to add a copy of this list to the proposal.

Show/Hide triggers may also unlock a different proposal path. In the following example, when a user selects the Global Citizenship page, there is a message stating "This course is either not proposed for or already approved for Global Citizenship. Edit the global status of this course on the cover page."

NewCourse: TS1-712 - Herpetology of the Great Basin
Status: Draft
Remaining Launch Requirements: 14   Launch   Delete Draft

Global Citizenship Application

This course is either not proposed for, or already approved for Global Citizenship
☐ Edit the global status of this course on the cover page

If the user returns to the Cover page and selects the checkbox indicating this course is proposed for Global Citizenship status, upon returning to the Global Citizenship page, they will be able to edit this page.

NewCourse: TS1-712 - Herpetology of the Great Basin

Status: Draft

Remaining Launch Requirements: **14**   [Launch]   [Delete Draft]

Proposal Resources	
Cover	4/7
Contributor	
Units/Hours	0/5
Course Characteristics	0/4
Pre/Corequisites & Advisories	
Requisite Validation	
Course Objectives	
Arranged Hours Objectives	
Course Content	
Lab Content	
Arranged Hours Instructional Activities	
Methods of Presentation	
Methods of Evaluation	
Appropriate Texts	
Sample Assignments	0/1

This course is cross listed in:

This course has no crosslisted courses

Formerly

Formerly Same As

Catalog Course Description *

sample for user manual

Course Notes to Print in Catalog

Rationale *

For NEW courses, explain why this course should be added to the _____ curriculum, explaining the "need" and the "target population" of the course. For course UPDATES, briefly explain what aspects of the course have been updated (especially any significant or substantial changes to items such as prerequisites, hours, units, …)

Proposal Information

Proposed Start Year: *

Proposed Start Semester: *

☐ Proposed For Distance Education

☑ Proposed For Global Citizenship ⟵

Rich Text Editor

This feature is used in numerous places throughout META. The Rich Text Editor within the META system provides several tools to help you format text entries. It also allows you to add hyperlinks and insert images like word-processing programs.

Copying and pasting an outline straight from Microsoft Word or a similar word-processing program will **NOT** provide a properly formatted outline. The embedded formatting information word-processing programs include will cause issues within the editor.

If pasting a paragraph of text (as you might for a Course Description) into the Rich Text Editor, you must paste it as plain text. Type **Ctrl+Shift+V** (in Windows), or right click on your mouse, and select **Paste as Plain Text**. If you do not do this, hidden formatting tags will interfere with the internal tools of the editor and cause problems with reports.

Creating an Outline within the Rich Text Editor

The simplest and best way to produce a properly formatted outline is directly in the Rich Text Editor. You may enter your line headings as you see fit, or use the built-in list tools.

The left **List Tools button** creates a bulleted list, and the right button creates a numbered list. Use the indent tools to create levels within the list. The button on the left (in the indent tools) will create an indent and the right side button will remove the indentation.

Below is an example of a bulleted list with several levels of indentation:
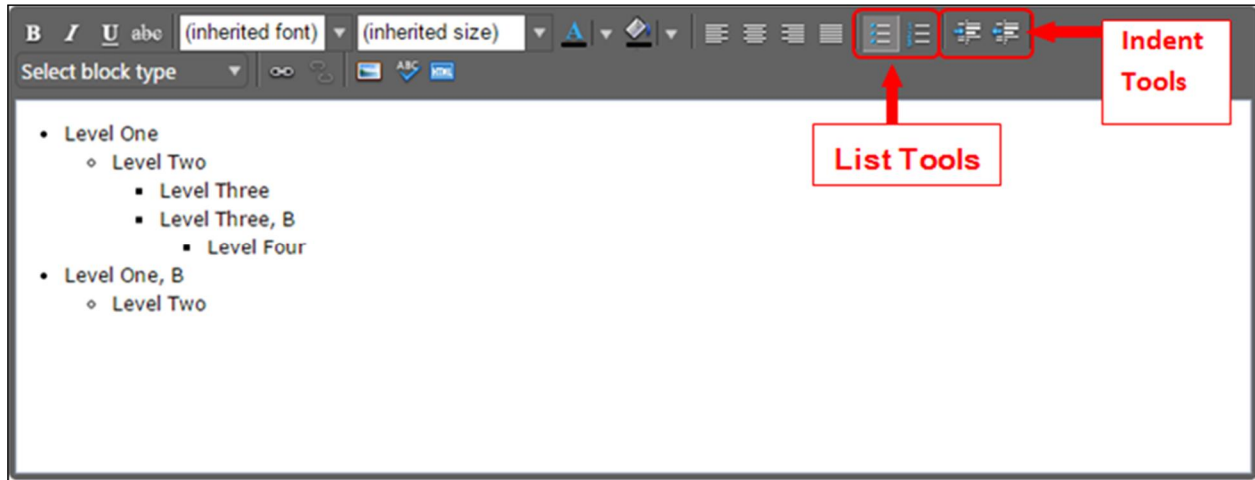
Below is an example of a numbered list with several levels of indentation:
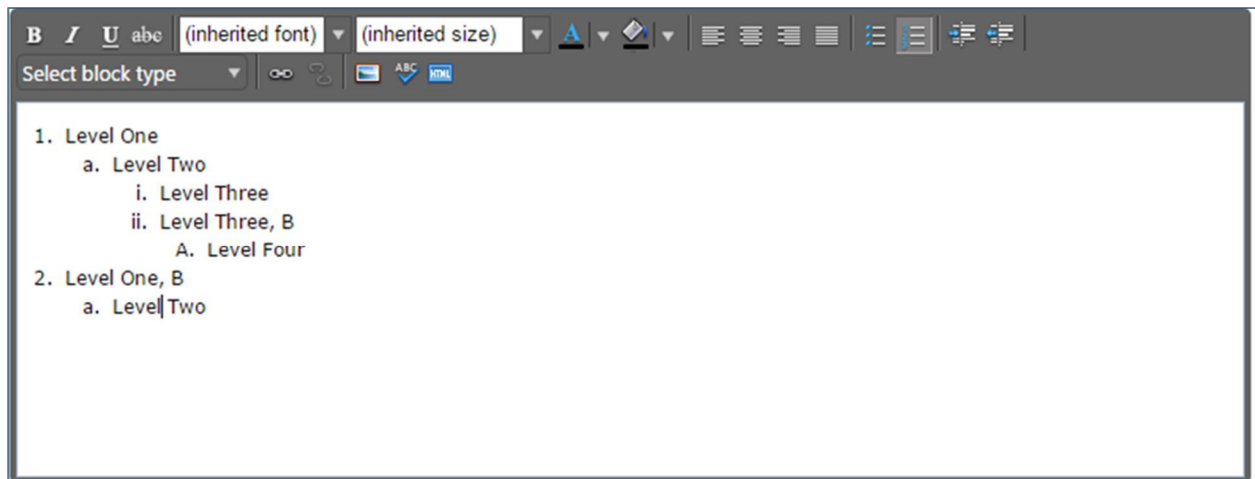
If you would prefer to specify your own level designations, you may do so as well, using the indentation tools as necessary.

To create indented levels, select the end of the last line before the indentation, and click **Enter**. Select the end of the last line of the indentation, and click **Enter** again. This will create a new block of text. You **MUST** add these additional hard returns to indent text.
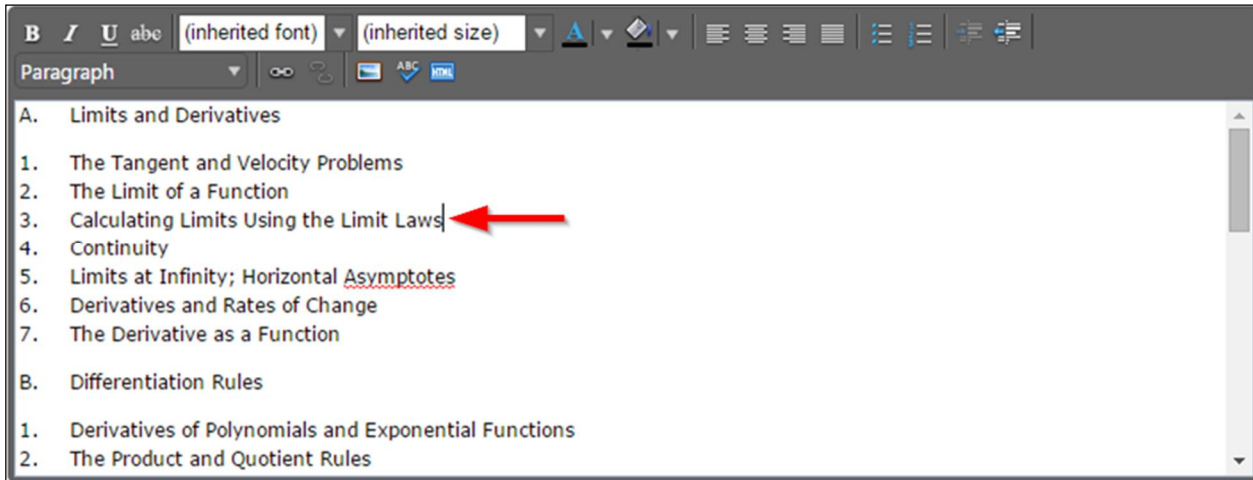
Click within the block to be indented, and click the **Indent** button. To indent a second level, click the button twice. For a third level, click three times, etc. Do this for each level.

Creating an Outline Using HTML

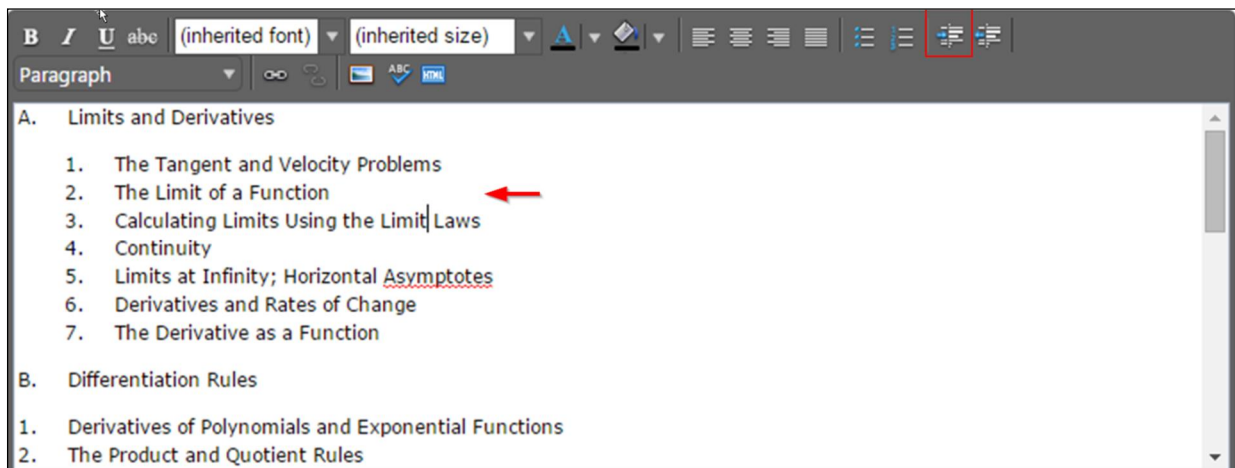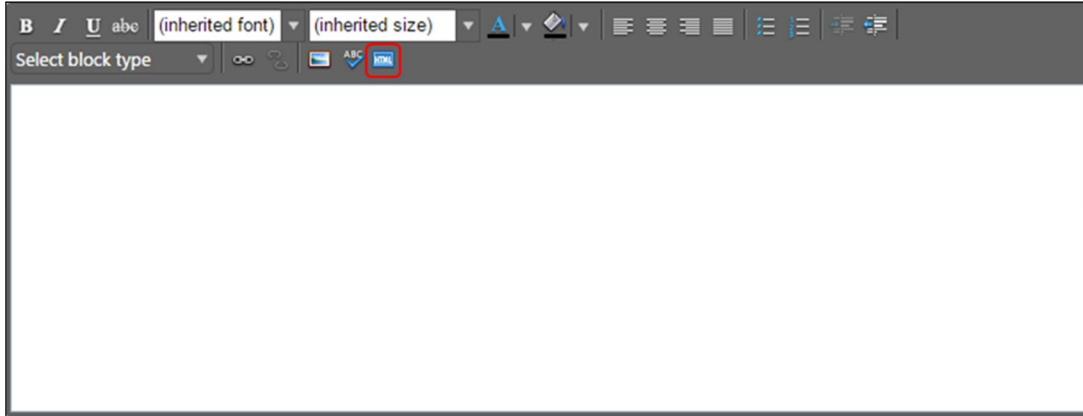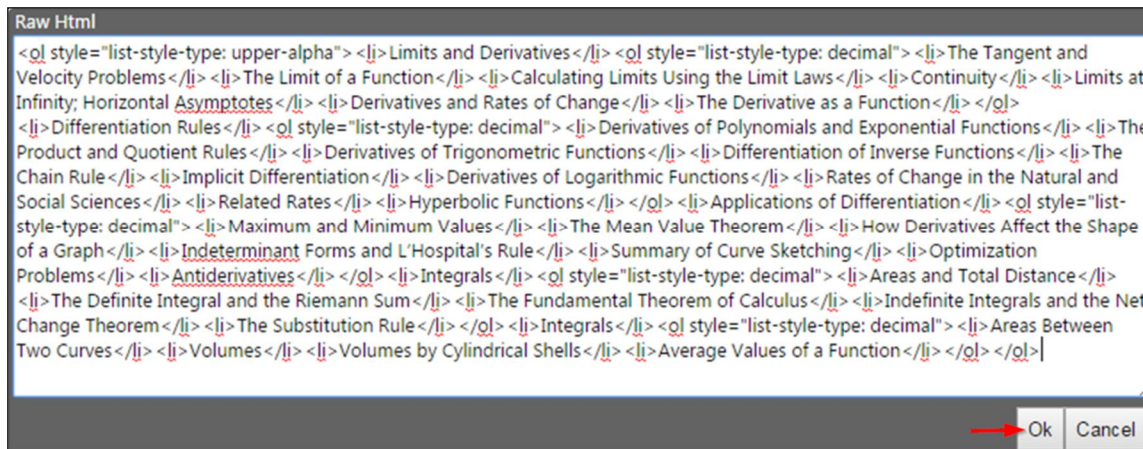The third way to create a properly formatted outline requires knowledge coding HTML. If you know how to format your outline in this method, click the **HTML** button.
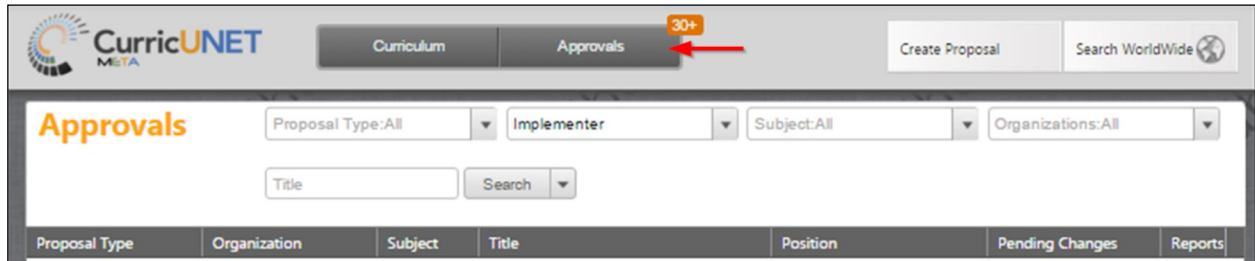
This will change the view of the Rich Text Editor. Enter or copy and paste your content and HTML code as desired. When finished, click OK to save your changes.

If done correctly, this will produce an outline in the Rich Text Editor.

Approvals

To view pending approvals, click the **Approvals** button at the top of any page. If you have any approvals waiting for you, there will be an orange box with a number in it attached to the **Approvals** button. The process is similar for all proposal types. The standard user without administrative privileges will not be able to see the **All Approvals** option. They will only be able to see approvals for which they are the originator or the next member of the approval process.

If you are the next user in the approval process, you will see this screen. If you wish to view the course, you can select **View Proposal**. You may also view any available reports by clicking the name of the report. Use the **Action** drop down menu to select the action you wish to take on the proposal, add any **Comments,** and then click **Commit**. When you make a comment it will become a permanent part of the comments once you click commit.
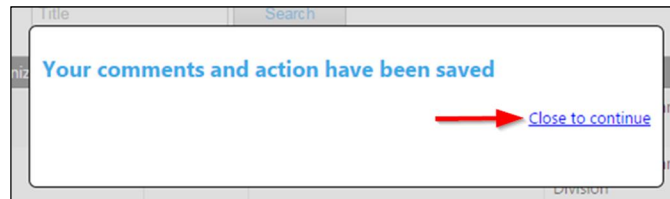
Committing your actions will move the proposal to the next part of the approval process. If you reject the proposal, it will remove the proposal from the system. If you request changes, it will send the proposal back to the originator. Once these changes have been made, the proposal will return to the person who requested the changes.

The **History** report shows what has happened in the approvals process for this proposal and who is next in line, the time and date each action was taken on the proposal. It also shows the actions that have been taken on this proposal and a permanent history of comments.

Make sure you see a confirmation message to confirm that when you clicked **Commit,** the action was received. The confirmation will appear in a popup window. You must click **Close to**

continue to ensure your actions are committed. **This is vital.** *If you do not see this popup, your action has not been saved, and you must perform your action again.*
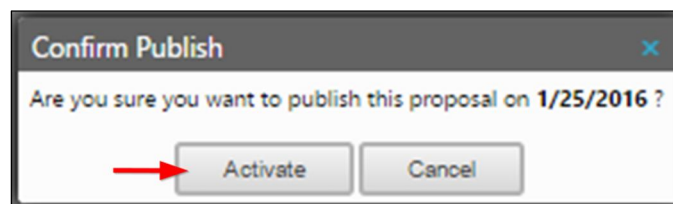

Implementing or Publishing Curriculum

To implement a curriculum proposal and add it to the college's offerings, the last user in the approval process must select **Implement** (1) from the action menu. Select the **Publish date** (the date the course will become active) by clicking on the **Calendar** icon (2). Add any comments necessary and click **Commit** (3).

You must confirm the final action by clicking **Activate**. *This is a vital action.* If you do not see this popup, your action has not been saved, and you must perform it again.
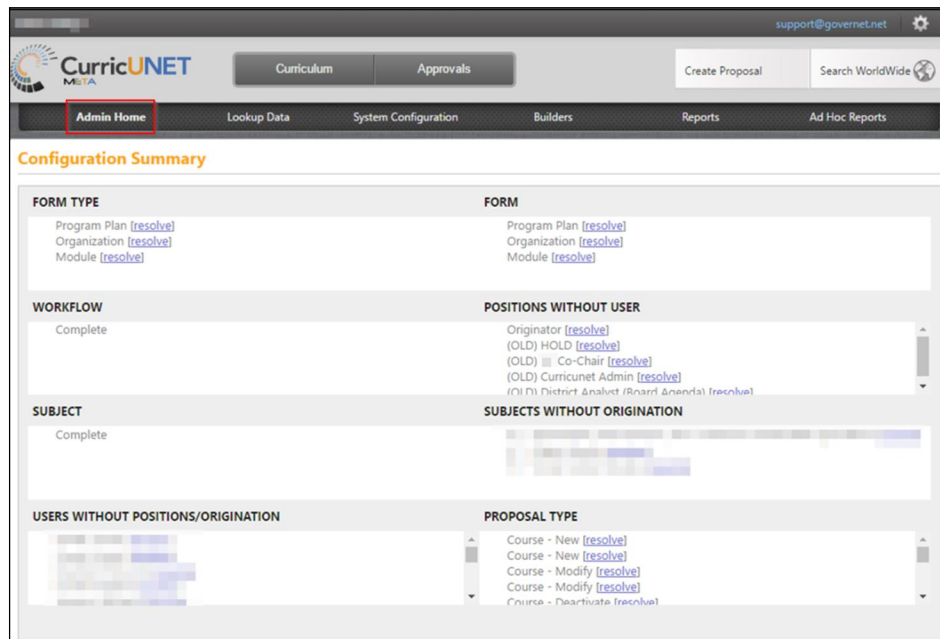

Public Search

Public Search allows your institution to embed a currIQūnet search window in your institution's website. Generally, students and the general public don't have access to any part of META, unless the institution has public search enabled. In this case, they can search curricula and have access to certain reports, generally course and program outlines.

Administer Site

Click the **Gear** icon (⚙) at the top right of the screen to administer the currIQūnet META site. Select **Administer Site** from the dropdown menu.
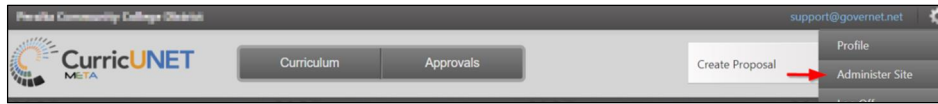

All administrative functions can be accessed through the **Configuration Summary** page. Return to this page from within the Administrative area by clicking **Admin Home**.

Navigating the Administrative Area

The main administrative functions of META are accessed through the tabs at the top of the window. Clicking on each tab will bring up related items in the dropdown menu.
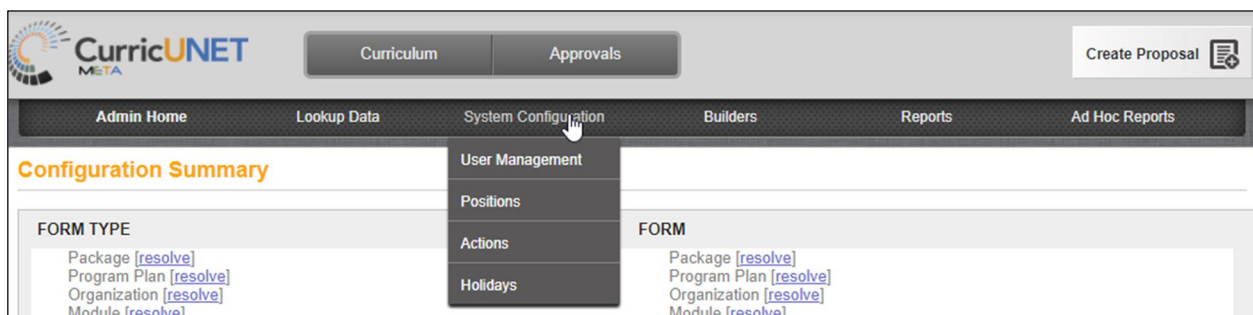
Navigating and Sorting Tables

Throughout META, tables and columns may be sorted and filtered for a variety of purposes. To sort columns, click the **Column Heading** you wish to sort. Clicking the column head once will sort in alphabetical order (A-Z), clicking twice will sort in reverse alphabetical order (Z-A). To navigate between pages of users, select the left and right arrows at the bottom of the list, or select the page number (1). Click the **Filter** icon (🔽) to the right of the column heading to search for a specific user (2). Items may be deleted throughout META by clicking the clicking (3) the **Delete** icon (❌).

Using Filter Conditions

Enter any filter conditions and click **Filter**. A filter can be applied to all columns and will combine to find only items that meet all conditions. To remove filters, click **Clear Filters**. Filters will need to be removed separately from each column.
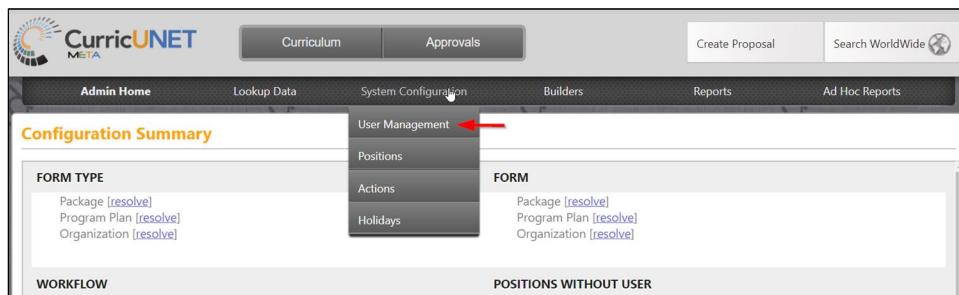
Lookup Data

The **Lookup Data** section or lookup manager is not currently editable by users who are not part of the currIQūnet team. Please contact currIQūnet Support for assistance with lookup values.
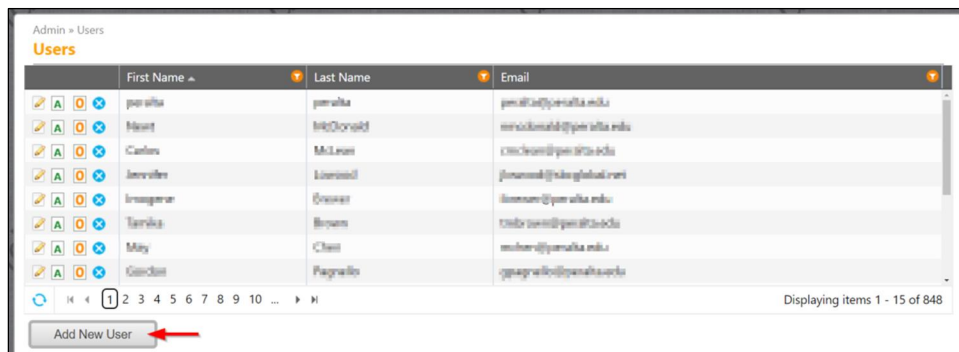
User Management

To manage users and their permissions, select **System Configuration**, then choose **User Management** from the dropdown menu.

Add a New User

To add a new user, select the **Add New User** button on the lower left of the screen.

Enter the basic user information into the user profile and select **Create**. You will need to assign the user a temporary password which the user must change when they log in the first time. After creating a new user, you will need to edit their profile to assign System Roles.
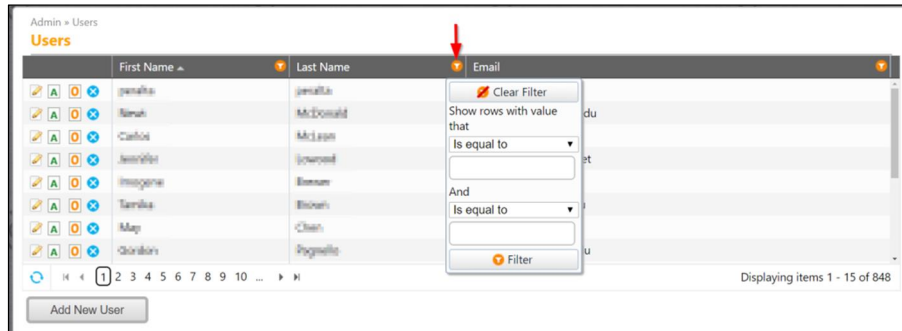
NOTE: If you receive a message stating "Email already exists in the database" when you click **Create**, please contact the currIQūnet support team to have the user reactivated through the database. Users are never deleted from the system, so if they are deactivated, their account still exists, but is not visible in the interface, and the deactivated user cannot log in.

Edit Existing Users

The User table shows all existing active users. To sort existing users, click the column heading you wish to sort. Clicking once will sort in alphabetic order (A-Z), clicking twice will sort in reverse alphabetic order (Z-A). To navigate between pages of users, select the left and right arrows at the bottom of the list (1), or select the page number. To search for a specific user, click the **Funnel** icon (2) on the right of the column heading.

Enter any filter conditions and click **Filter**. A filter can be applied to all columns and will combine to find only users who meet all conditions. To remove filters, click **Clear Filters**. Filters need to be removed separately from each column.

To edit an existing user, click the **Pencil** icon ( ) to the left of their name.
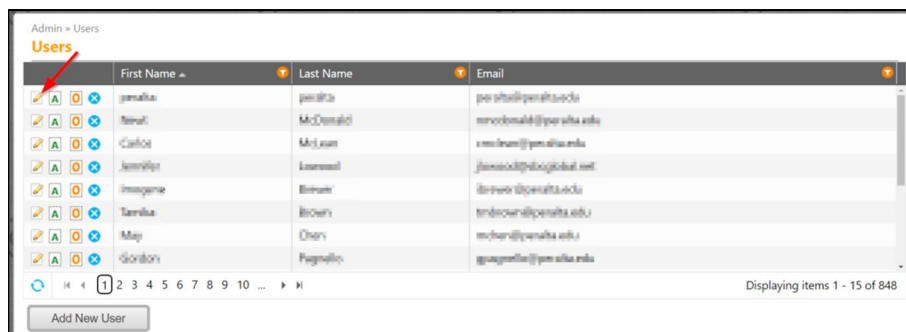
Assigning Roles and Permissions

Assign **System Roles** to the user. All users in the system are automatically assigned the **User** role and must have this role to be able to log in, even if they will also have another role. See **System Roles** below for an explanation of roles.

NOTE: If your institution is configured as a **District**, assign the **Primary College** for this user. Non-District configurations will not include this field. District users must be assigned **Roles** for all colleges in the district for which they will contribute proposals or participate in approval workflows.

Save any changes.

System Roles

Users may be assigned any combination of System Roles. Roles can be added or removed at any time. In a district system, users may be assigned roles at any college, in any combination. They do not need to have the same roles at each college.

Admin

An Admin user acts as an administrator of the 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 hierarchy. 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.

Catalog Coordinator

At this point, the Catalog Coordinator role does not convey any special rights or privileges. However, as currIQūnet's new Catalog Module is developed, this role will be used as part of the module.

Live Edit

The Live Edit role gives a user the ability to edit any proposal at any time, in any status or department, as an admin user does. This does **not** grant 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. For example, 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.

User

All users in the META system must be assigned the User role (including administrators and users with other roles). It is assigned by default, and if it is removed, the user will not be able to log in 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 to contribute to proposals, but will not be able to create proposals on their own. This role is for informational purposes. If a user with the Contributor role is assigned Origination permissions, they will be able to create proposals.

Approval Permissions

Click the **A** icon (🅰) to the left of their name to edit a user's existing **Approval Permissions**.

To add an approval position to the user, click **Add Permission**. Positions must be added individually.

User Management

Select the **Position** from the dropdown menu. To add positions to the system so they will appear in this list, see the **Positions** section of this manual. Enter the **Begin Date** and **End Date** that this user will hold the position, if desired. By default, the position will be assigned immediately and will continue until manually removed from the user, unless dates are selected in these fields. Select **Add** to give the user this assignment if the position is an unfiltered position or applicable to the entire college.

If the position can be filtered or restricted to certain areas of the hierarchy, select the level to **Filter On** from the dropdown menu, which contains the levels of your hierarchy by which the position can be filtered. Click to select the organizations that the user is associated with.

For example, select **Biology** for a member of the Department Member committee for the Biology Department. Departments will turn a darker gray when they have been selected. To remove the department restriction, click the darker gray department again. If no organizations are selected, the user will be assigned to the approval process of all proposals that contain that position. You can mix and match permissions from the different levels of the hierarchy by changing the value selected in the **Filter On** dropdown menu.

Select **Add** to give the user this assignment.

Click the **Pencil** icon (🖉) to the left of the permission in order to **Edit** an existing position. Click the **Delete** icon (✖) to the right of the permission to remove a position.

Origination Permissions

Click the **O** icon (🅞) to the left of their name to edit **Approval Permissions** for a user.

To add or change origination permissions, click **Modify Permissions**.

Select the **Origination Level** from the dropdown menu. Origination permissions will cascade through the hierarchy tiers, so that users with a Department level permission will be able to originate programs in that department as well as courses in any subject belonging to that department.
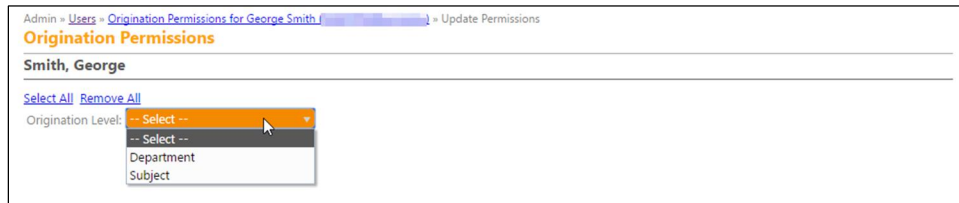
Click the organizations to assign origination permissions, and then click **Update**.
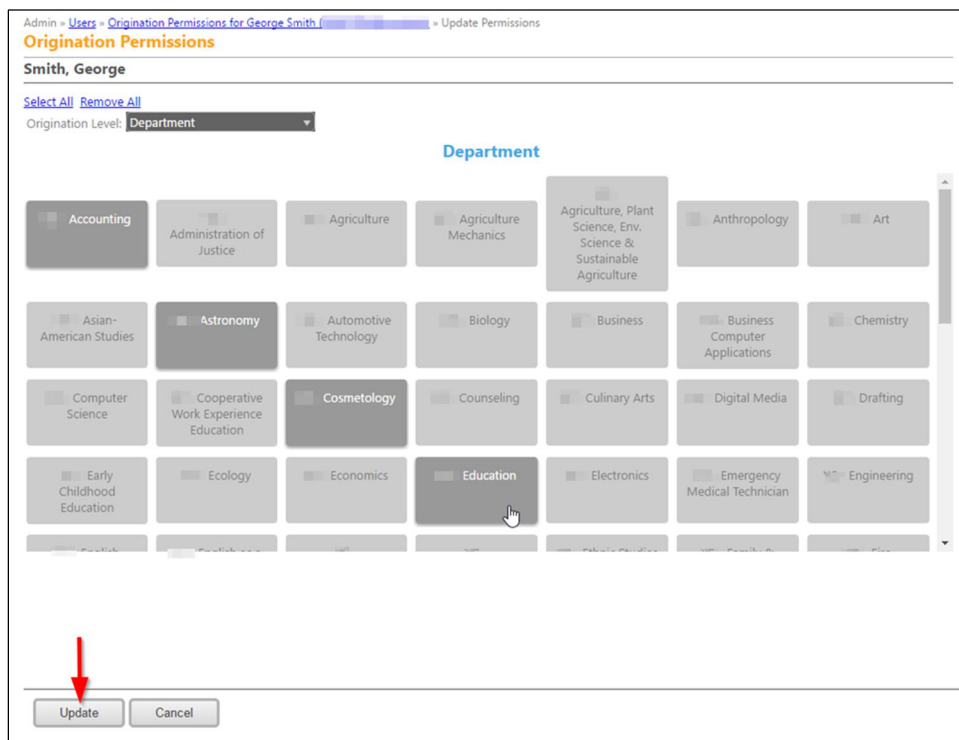
Permissions will appear grouped by organization tier. To edit existing permissions, click **Modify Permissions**. To remove positions for the tier altogether, click the **Delete** icon (⊗) to the right of the tier.
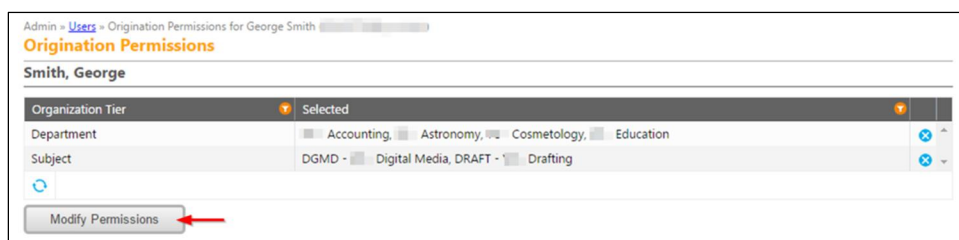
Positions

Positions are assigned to users to include them in proposal approval processes. To manage positions, select **System Configuration**, then choose **Positions** from the dropdown menu.
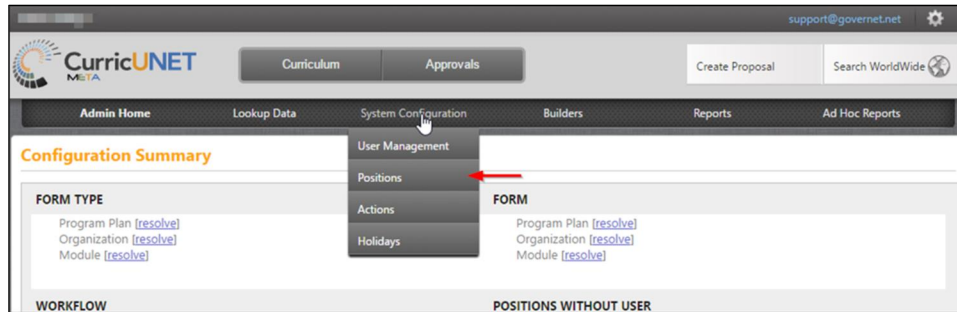
Positions may be sorted and filtered by selecting their column headings, and the **Filter** icon (🔽) in each column heading.

NOTE: The **Institution** column is specific to district configured institutions. Non-district configurations will not include this column.

To edit an existing position, select **Edit** to the left of the position. To add a new position to the system, click **Add New Record**. Click the **Delete** icon (❌) to the right of the position to remove an existing position.

NOTE: Positions that are currently part of a workflow cannot be removed, and a red "no" symbol (🚫) will replace the **Delete** icon.

Enter the position **Title**, and select the **Lowest Tier** in the organization by which this position can be assigned. If this position will have a meeting to review groups of proposals at the same time and needs to have an agenda report to summarize the proposals, select **Has Agenda Report**. If the user holding this position should be able to edit the proposal while it is at their position in the workflow, select **Can Edit in Review**.

NOTE: The **Institution** field is specific to district configured institutions. Non-district configurations will not include this field. The **Institution** field assigns a primary college to own this position. The **Global Position** field is also specific to district configured institutions, but all institutions will see this field. **Global Position** allows all colleges in the district to use this position in their workflows, regardless of the primary institution.

Actions

Actions are used in combination with Positions to create Approval Workflows.

Select **System Configuration**, and then choose **Actions** from the dropdown menu to manage actions.
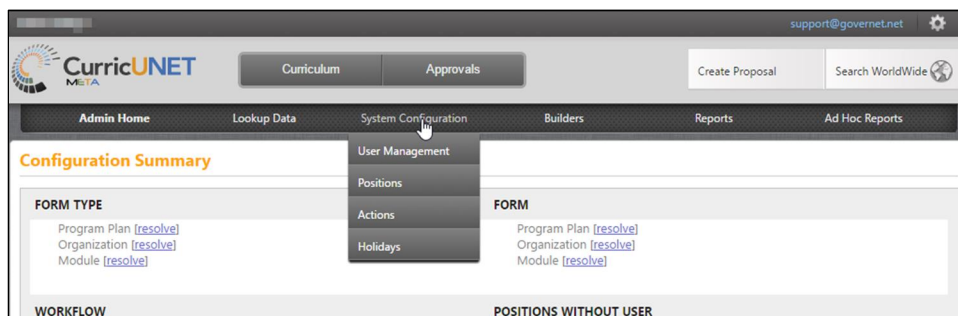
Actions may be sorted and filtered by selecting their column headings, and the **Filter** icon (🔽) in each column heading. To create a new action, click the **Add new record** button.

Complete the fields that appear: **Title** and **Description**. Select to **Vote** or **Request Changes** from the **Action Behavior** dropdown menu. A **Vote** action either moves the proposal forward in the workflow or finishes the workflow. A **Request Changes** action returns the proposal to the originator for corrections. Check whether the box can be used as a **Default Action, which allows the proposal to move through the workflow without direct action by a user**. Click the **Checkmark** (🗸) to save the new action, or **Cancel** (⊘) to discard. Click the **Refresh** button (↻) to update the table.
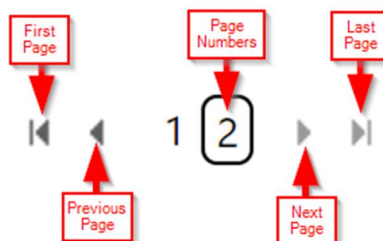

Navigate through the Actions by using the **First**, **Previous**, **Page Numbers**, **Forward**, and **Last** buttons at the bottom of the page.


Actions may be edited by clicking the **Pencil** icon (✎). Actions can be deleted by clicking the **Delete** icon (✕).

NOTE: Actions included in an active approval process cannot be deleted and are indicated by the "no" icon (⊘). Actions that may be deleted are indicated by the **Delete** icon.

Holidays

Holidays are used by META to determine when to send reminders and when to take default actions. Weekends (Saturday and Sunday) are automatically included in the determination. Holidays can also be used to designate days that the campus is closed and staff and faculty are not expected to work, such as spring break, scheduled system or campus facility maintenance, or any other closures.

To manage holidays, select **System Configuration**, then choose **Holidays** from the dropdown menu.
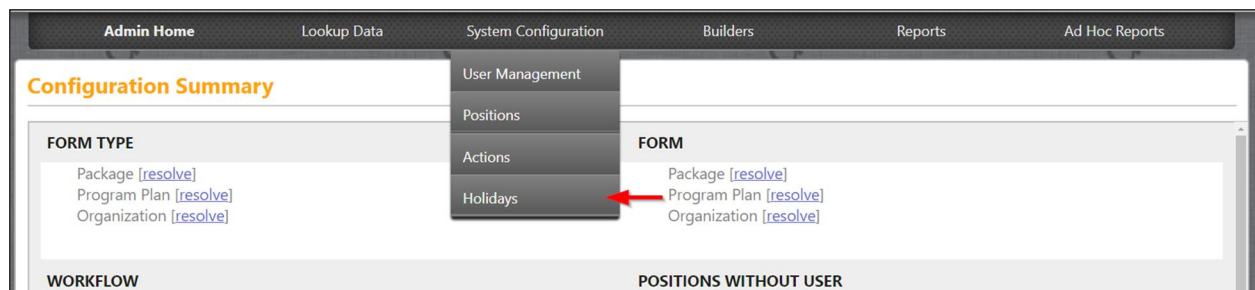
Holidays may be sorted and filtered like any other table.

META has several system level holidays that cannot be removed or edited in the interface. If your institution does not observe one or more of these holidays, and would like them removed, please contact the currIQūnet Support team to have them removed via the database.

To add a new holiday, click **Add new holiday**. Click the **Pencil** icon (✎) to the left of the holiday to **Edit** the existing holiday. Click the **Delete** icon (✖) to the right of the holiday to delete it.

Enter the **Holiday Name**, and then select the date type for this holiday from the **Holiday Type** column. Each selection will show a different combination of fields in the **Holiday Details** column. Click **Save** to add the holiday to the system.

NOTE: Holidays can only be added one day at a time. If you need to add a series of days, in the case of Spring Break, for example, you must add them one day at a time.
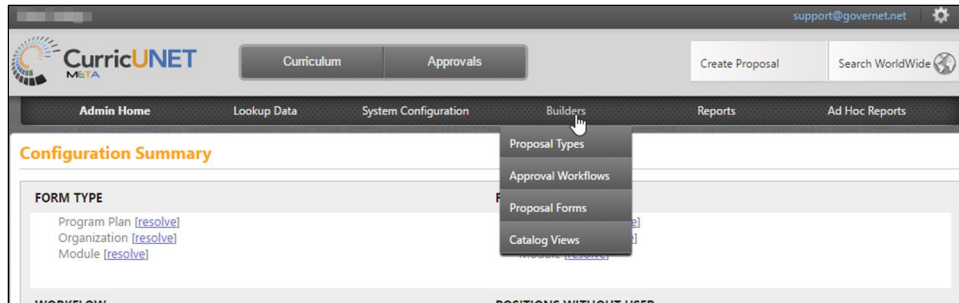
Proposal Types

To manage your institution's proposal types, click the **Builders** link and select the necessary area from the dropdown menu.


Proposal Types combine Approval Workflows and Proposal Forms to get the right information to the required people for new curriculum.

To manage proposal types, select **Builders**, then choose **Proposal Types** from the dropdown menu.
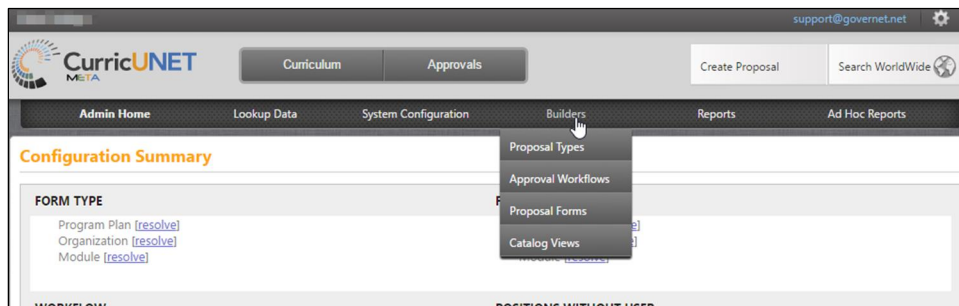
Sort the column heads as desired, then enter any filter conditions and click **Filter**. A filter can be applied to all columns and will combine to find only users who meet all conditions. To remove filters, click **Clear Filters**. Filters will need to be removed separately from each column.
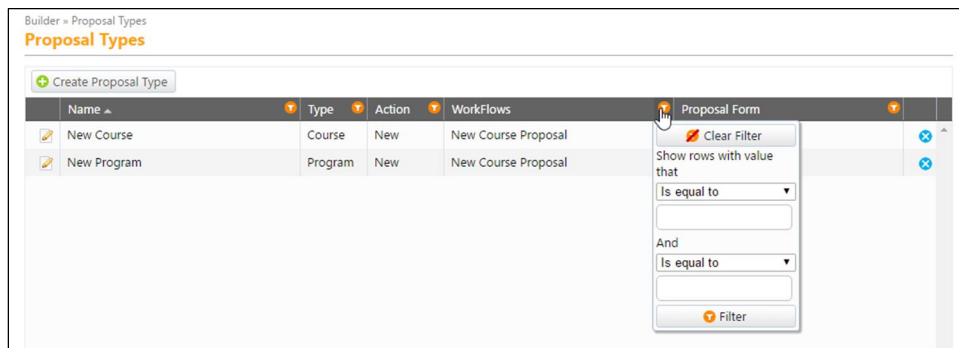
Click the **Delete** icon (⊗) to the right of the proposal type to delete an existing proposal type. When proposal types are deleted, existing proposals are not affected, and currently In Review proposals can still have actions taken to complete the workflow, but no additional proposals using that proposal type can be created.

Please contact currIQūnet Support if you need existing proposal types renamed or otherwise updated.

To add a new proposal type, select **Create Proposal Type**.

Enter the **Title** for the new proposal type, then select the **Curriculum Type** from the dropdown menu.

NOTE: The dropdown menus on this page must be completed in the order presented, because each selection filters the options for the next menu.

A new menu may appear titled **Module Type**. This field allows you to specify a sub-type for this proposal. For example, your institution may have Undergraduate Courses and Graduate Courses, or Credit, Non-Credit, and Community Education courses. Please contact CurrIQūnet Support to set up the types.

Next, select the **Action** for this proposal type, the **Proposal Form**, and the **Approval Workflow**.

Some workflows have custom organization binding on certain positions. If the workflow used in this proposal type has this distinction, additional fields will appear to designate the field in the proposal form to which the step is bound.

Click **Save** to create the proposal type, or **Cancel** to discard the proposal type.

Approval Workflows

Approval Workflows define the process of approving new curriculum. They are sometimes also referred to as Approval Processes.

To manage workflows, select **Builders**, then choose **Approval Workflows** from the dropdown menu.
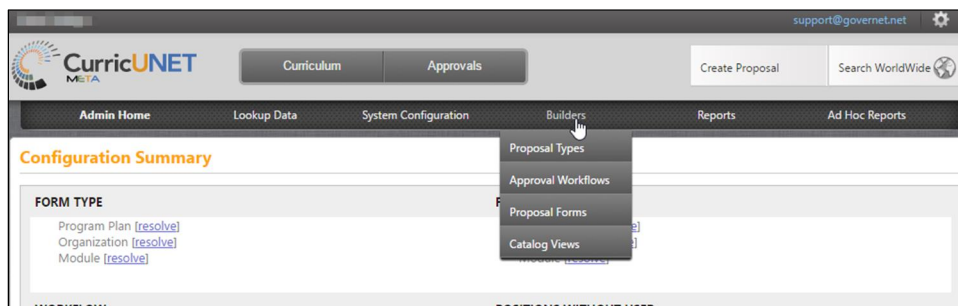
To sort the existing workflows, click the column heading by which you wish to sort. Clicking once will sort in alphabetic order (A-Z), clicking twice will sort in reverse alphabetic order (Z-A). To navigate between pages of workflows, select the left and right arrows at the bottom of the list, or select the page number. Click the **Funnel** icon ( ) on the right of the column heading to search for a workflow.

Enter any filter conditions and click **Filter**. A filter can be applied to all columns and will combine to find only users who meet all conditions. To remove filters, click **Clear Filters**. Filters need to be removed separately from each column.

Click the **Delete** icon (⊗) to the right of the workflow to delete an existing proposal type. Click the **Pencil** icon (✎) to the left of the workflow to edit a workflow. To add a new workflow, select **Create Workflow**.


Enter the **Title** of the new workflow, and select the **Workflow Action**. If your institution is a district, select the **Institution** that owns this workflow, and which institutions will also be able to use this workflow.

NOTE: If your institution is not configured as a district, you will not see these fields. Click **Create** to add the new workflow.

Individual workflows contain **Draft** and **Historical** versions. The **History** section includes the current active version of the workflow, being used now. The active version will not have an end date.

Active and Historical workflows cannot be edited. Click the **View** (👁) icon to the left of the workflow to view the existing version.
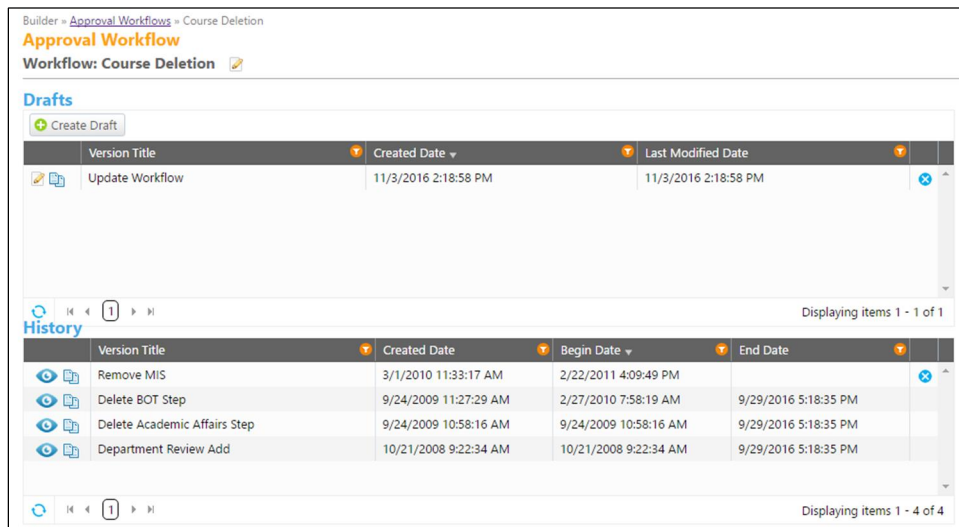
The **View** icon opens a graphic summary of the workflow version. Click the green **Properties** icon (ⓘ) on the level or the individual position to view the actions for each position and level.

Click **Properties** to view the level details all the actions for all positions on the level, and the result of each action.

Click the gray **Properties** icon (ⓘ) to view the individual position. This shows whether the position is required or optional, the actions the user can take at that position, and other details about the position at that level.

Click the **Copy** icon (🗐) to copy any version to create a starting point for a new draft. You may also choose to create a draft from scratch by selecting **Create Draft**. Existing, non-active drafts may be edited by clicking the **Pencil** icon (✎).

Enter a title for the draft and click **Create**.

Click the "**Add**" icon (⊕) on the level preceding where the new level should be to add a level to the workflow.
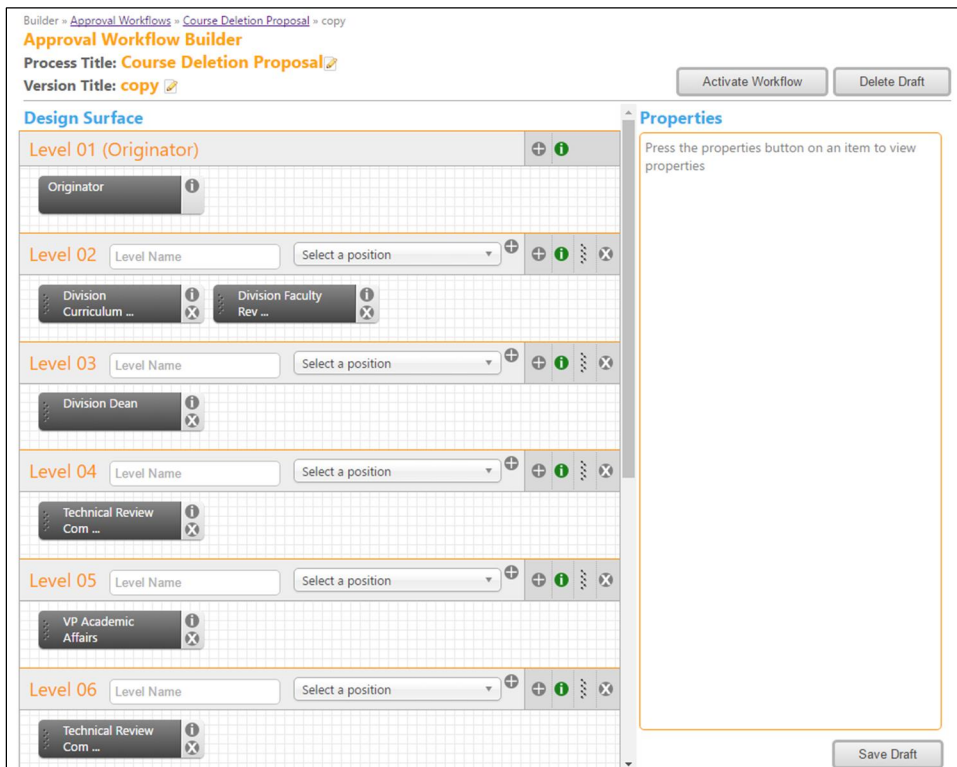
You may name any level, if desired by clicking the **Level Name** textbox. If no name is specified, the level will be referred to as the first required position on the level. To add a position to any level, choose the position from the **Select a position** dropdown menu, then click the **Add** icon next to the dropdown.
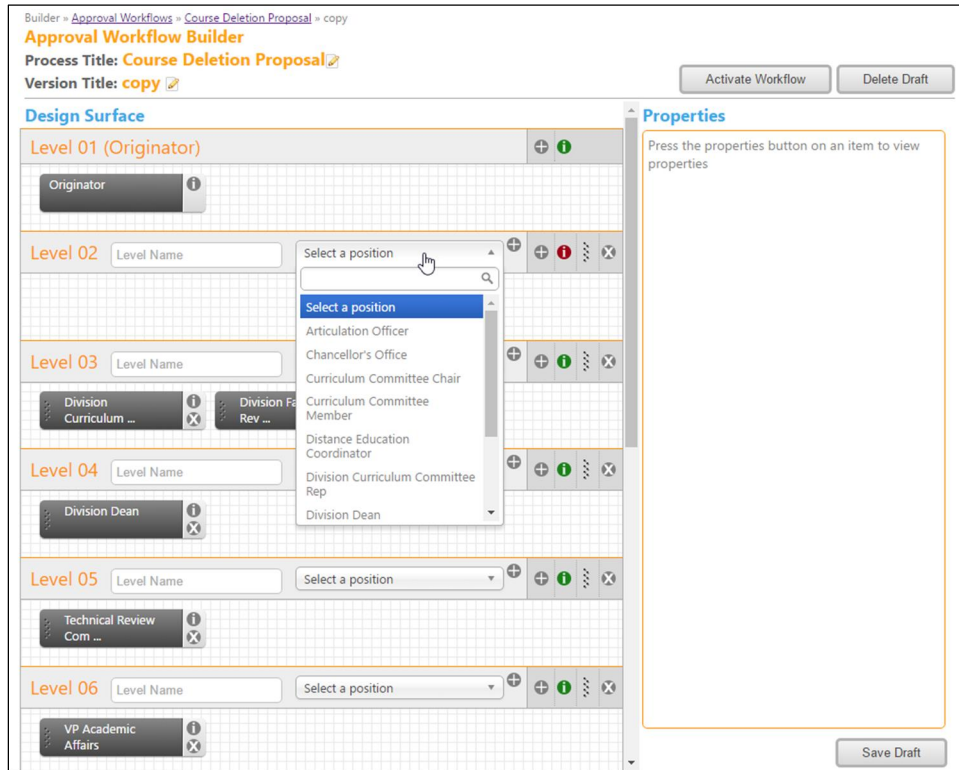
Click the **Properties** icon provide details about the position. Indicate whether this position is **Required** or **Optional**, keeping in mind that all required positions must take action before the proposal moves to the next level, and once all required positions have taken action, the proposal will move on whether or not the optional positions have taken action. All levels must have at least one required position.

Indicate if the position has **Custom Organization Binding** different from what was indicated when the position was created. If this is selected, you will specify the binding in the Proposal Type creation using this workflow. See Proposal Types section.

currIQūnet META will send a notification when the proposal first enters the level and is added to the users' approval queue. Enter the number of days before the system should send a **Reminder** notification to the user(s) assigned this position, if desired. For instance, if you enter "5", the user will be reminded every 5 *business days*, (not including weekends and holidays), until they take action on the proposal.
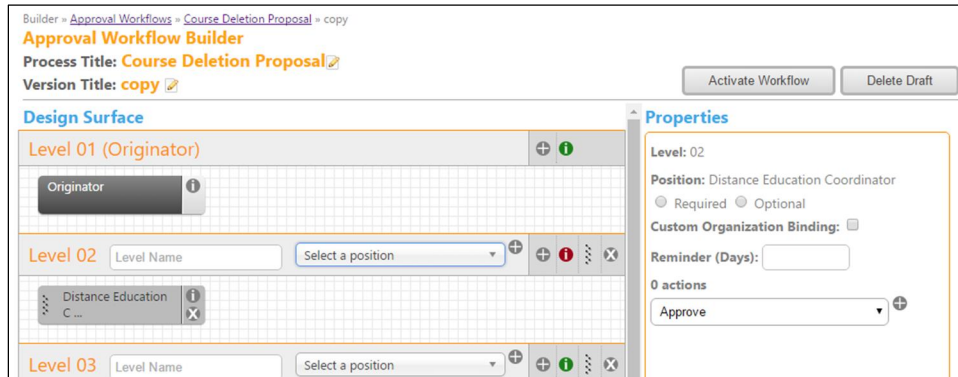
Finally, select the **Action** users holding this position can take at this level from the dropdown menu. Actions are sorted as **Request Changes** and **Voting** actions, based on what was specified when the action was created (see the **Actions** section of this manual). Click the gray **Add** icon to add the action. Each position must have at least one action.
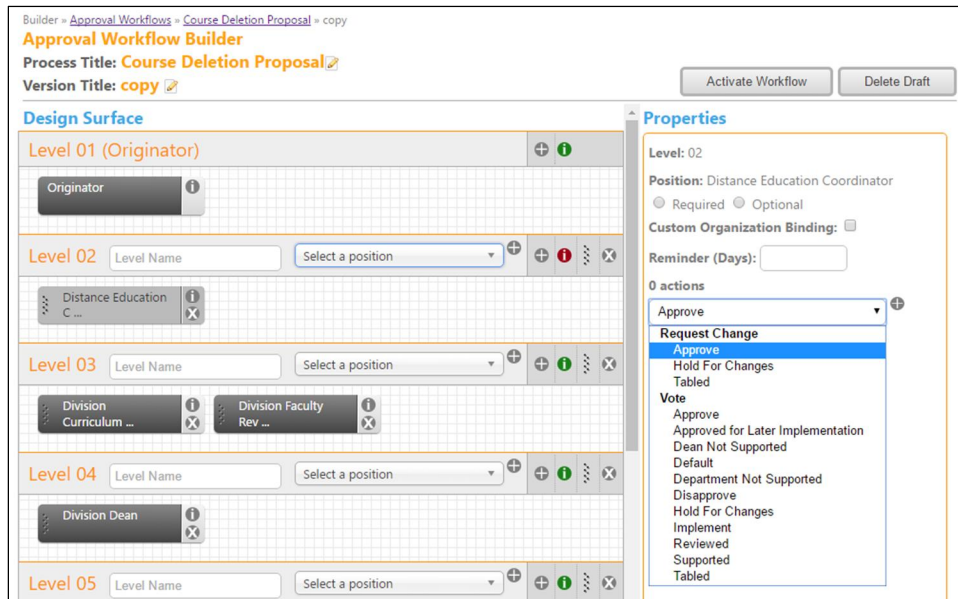
If the position is **Required** on this step, actions have the option of being marked as a **Default** action, based on what was specified when the action was created (see the **Actions** section of this manual). Only one action may be marked as the default action for each position, and a user must be assigned to the position for the default action to occur.

If an action is selected as **Default**, additional fields will appear. Specify the number of business days after which the action will occur, not including weekends and holidays. Specify the number of business days prior to the default occurrence that a reminder email should be sent to the assigned users.

Once all positions on the level have been configured, click the **Properties** icon on the level. This icon will be red (🛈) until all configuration requirements for the level have been met. For **Vote Actions**, indicate if the action **Completes the Proposal** or select the **Target Level** if it does not complete the proposal workflow. If the action completes the proposal, select the **Target Status** for the proposal.

Request Change Actions return the proposal to the originator, and then typically returns it to the user who requested the change. If the proposal should return to another user, select the **Restart the workflow** checkbox, then select the level to start the workflow on in the **Restart to level** dropdown menu.

You may save the workflow draft at any point when the level property icons are all green by clicking **Save Draft**. When the workflow is complete, select **Activate Workflow** to begin using the workflow. If there are existing proposals in review using a previous version of this workflow, they will continue using the old version. Any existing draft or future draft proposal launched using this workflow will use this version of the workflow.

You may also remove the workflow draft and start over by clicking **Delete Draft** at any time.

While the proposal is in the draft state, you may edit the Process Title or the Version Title by clicking the **Pencil** icon ( ) next to the titles.

Edit the title, and click **Update**.
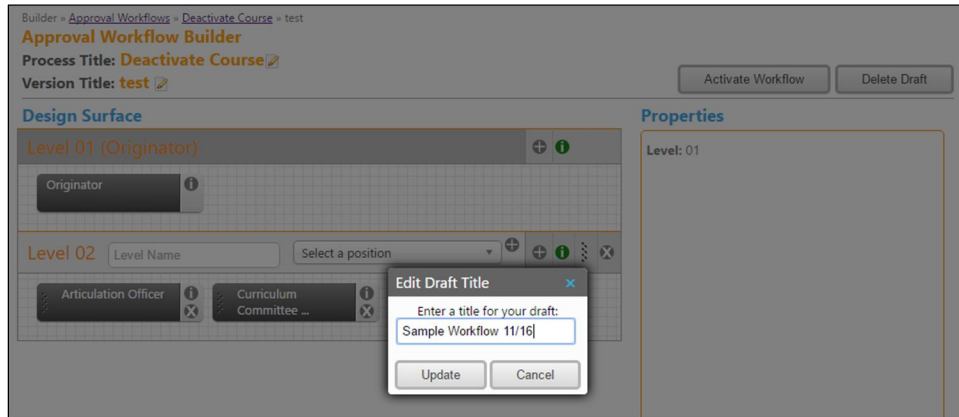
Create New Workflow

To add a new workflow, select **Create Workflow**.
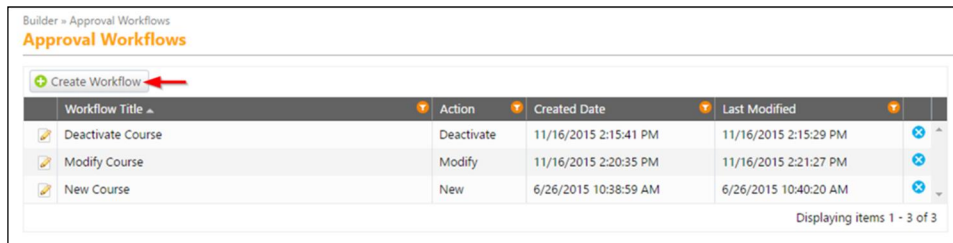
Enter the **Title** of the new workflow, and select the **Workflow Action**. If your institution is a district, select the **Institution** that owns this workflow, and which institutions will also be able to use this workflow.

NOTE: If your institution is not configured as a district, you will not see these fields. Click **Create** to add the new workflow.

Individual workflows contain **Draft** and **Historical** versions. The **History** section includes the current, active version of the workflow being used. The active version will not have an end date.

Active and Historical workflows cannot be edited. Click the **View** icon (👁) to the left of the workflow to view the existing version.

The **View** icon opens a graphic summary of the workflow version. To view the actions for each position and level, click the green **Properties** icon (1) on the level or the individual position.

Click the green **Properties** icon to view the level details all the actions for all positions on the level, and the result of each action. Click the gray **Properties** icon (2) to view the individual position. This will show whether the position is required or optional, the actions the user can take at that position, and other details about the position at that level.

You may choose to create a draft from scratch by selecting the **Create Draft** option (1). To copy an existing version to create a starting point for a new draft, click the **Copy** icon (2).

Enter a title for the draft and click **Create**.

To add a level to the workflow, click the **Add** icon on the level preceding where the new level should be.

You may name any level, if desired by clicking the **Level Name** textbox. If no name is specified, the level will be referred to as the first required position on the level. To add a position to any level, choose the position from the **Select a position** dropdown menu, then click the **Add** icon (⊕) next to the dropdown.

META will send a notification when the proposal first enters the level and is added to the users' approval queue. Enter the number of days before the system should send a **Reminder** notification (1) to the user(s) assigned this position, if desired. For instance, if you enter "5", the user will be reminded every 5 business days, not including weekends and holidays, until they take action on the proposal.

Click the **Properties** or gray "**i**" icon (2) to provide details about the position. Indicate whether this position is **Required** or **Optional**, keeping in mind that all required positions must take action before the proposal moves to the next level, and once all required positions have taken action, the proposal will move on whether or not the optional positions have taken action. All levels must have at least one required position.

Indicate if the position has **Custom Organization Binding** different from what was indicated when the position was created. If this is selected, you will specify the binding in the Proposal Type creation using this workflow. See the **Proposal Types** section for more information.

Select the **Action** users holding this position can take at this level from the dropdown menu. Actions are sorted as **Request Changes** and **Voting** actions, based on what was specified when the action was created (see **Actions**, to view the existing version, page 6). Click the gray **Add** icon (3) to add the action. Each position must have at least one action.
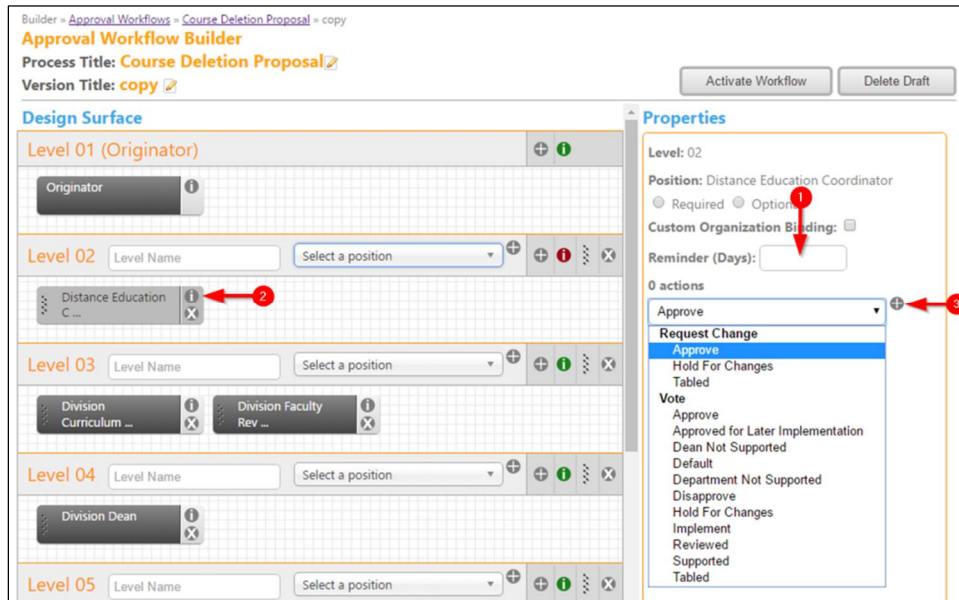
If the position is **Required** on this step, actions have the option of being marked as a **Default** action, based on what was specified when the action was created (see **Actions**, page 6). Only one action may be marked as the default action for each position, and a user must be assigned to the position for the default action to occur.
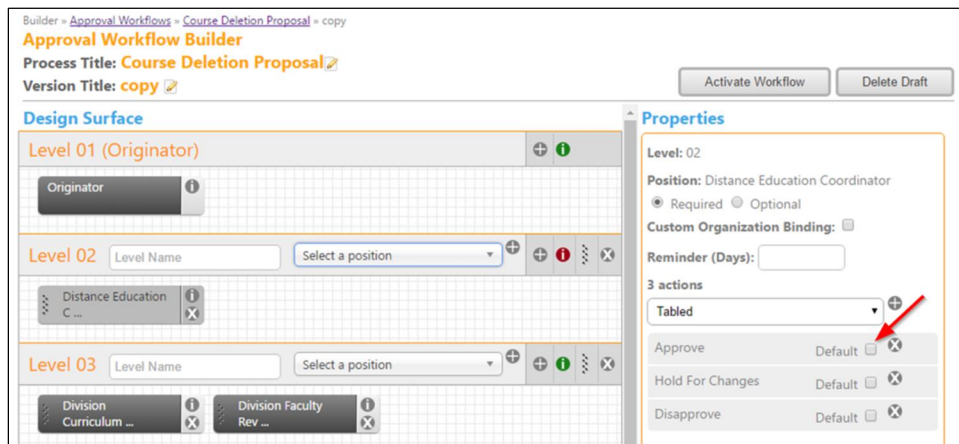
If an action is selected as **Default**, additional fields will appear. Specify the number of business days after which the action will occur, not including weekends and holidays. Specify the number of business days prior to the default occurrence that a reminder email should be sent to the assigned users.
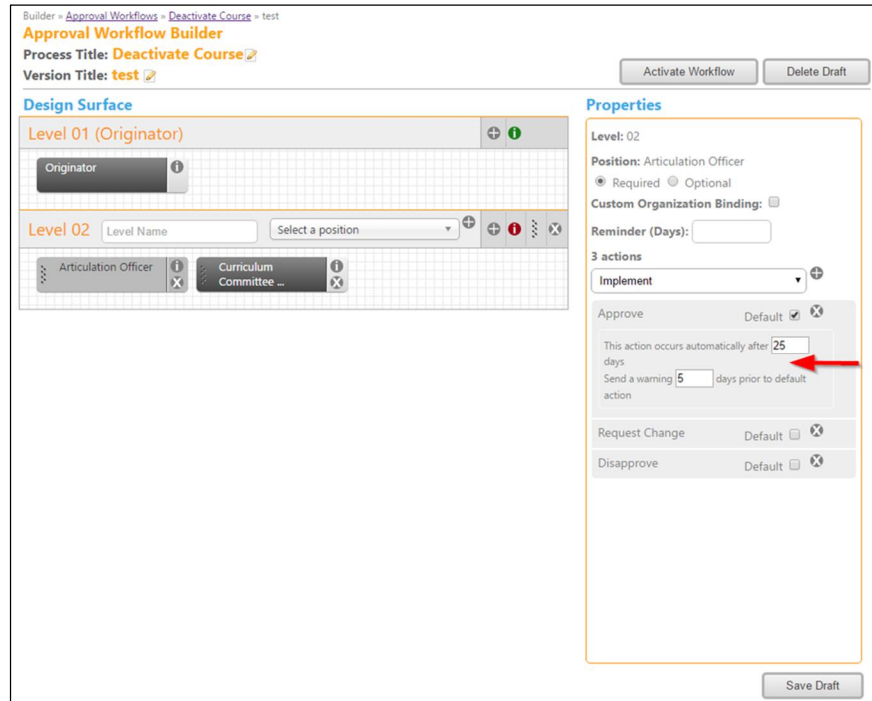
Once all positions on the level have been configured, click the red **Properties** icon (1) on the level. This icon will be red until all configuration requirements for the level have been met. For **Vote Actions**, indicate if the action **Completes the Proposal** or select the **Target Level** if it does not complete the proposal workflow. If the action completes the proposal, select the **Target Status** for the proposal.

Request Change Actions (2) returns the proposal to the originator, and then typically returns it to the user who requested the change. If the proposal should return to another user, select the **Restart the workflow** checkbox, then select the level to start the workflow on in the **Restart to level** dropdown menu.
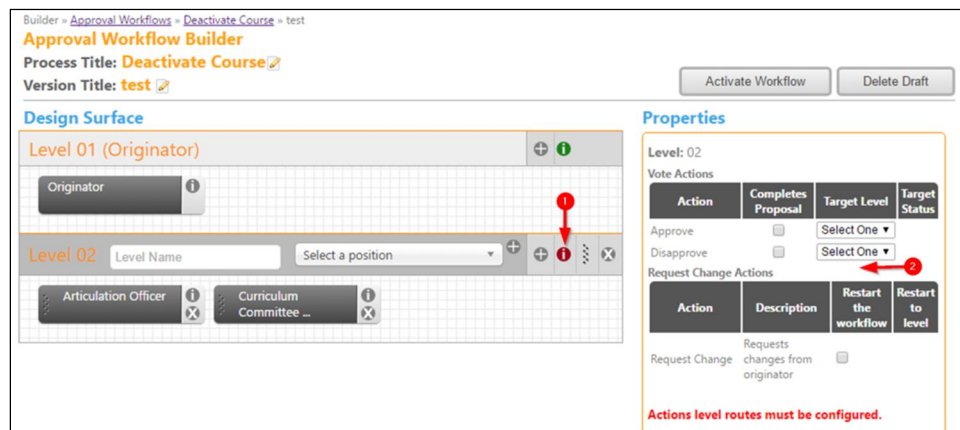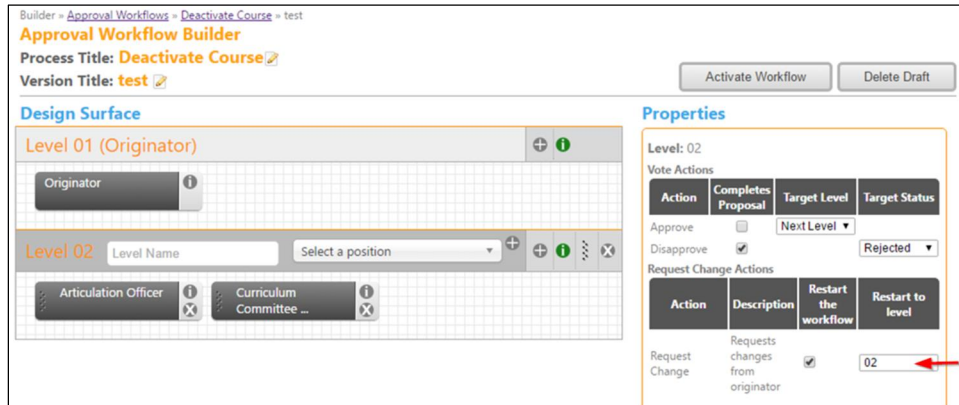
You may save the workflow draft at any point when the level property icons are all green by clicking **Save Draft**. Select **Activate Workflow** to begin using this workflow when the workflow is complete. If there are existing proposals in review using a previous version of this workflow, they will continue using the old version. Any existing draft or future draft proposal launched using this workflow will use this version of the workflow.

You may also remove the workflow draft and start over by clicking **Delete Draft** at any time. While in the draft state, you may edit the Process Title or the Version Title by clicking the **Pencil** icon next to the titles.

Edit the title and click **Update**.
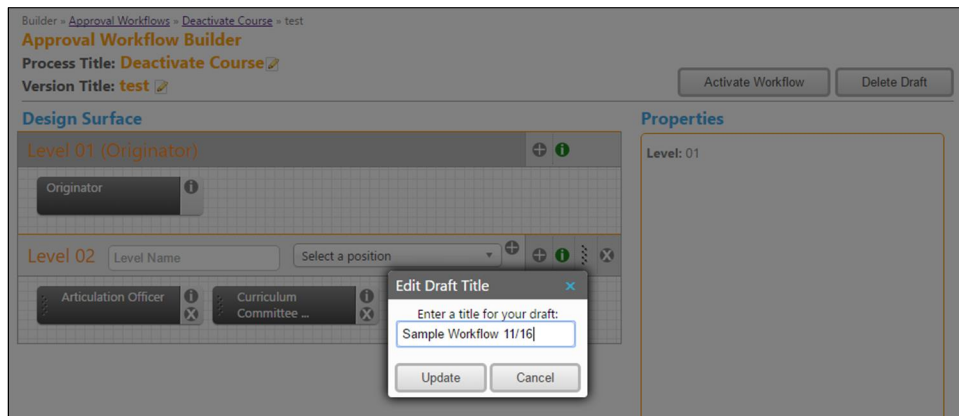
Proposal Forms

The Proposal Forms section is not currently editable by users who are not part of the currIQūnet team. Please contact the Support team for assistance.

Catalog Views

The Catalog Views section is not currently editable by users who are not part of the currIQūnet team. Please contact the Support team for assistance.

Admin Reports

Admin users are those who have META administrative permissions. Technically, all reports are admin reports, but admin reports are available only to admin users. These are found in the Administer Site section of META (see Administer Site, page 76). Proposal-specific reports are available to non-admin users.

Non-admin users, or the majority of the faculty at the institution, only have access to the reports attached to proposals (the course/program/assessment reports). There may be a few exceptions to this at your institution, depending on how your institution allows access to reports in META.

To access Admin Reports, click the **Gear** icon (⚙) and then click **Reports** from the Admin page.
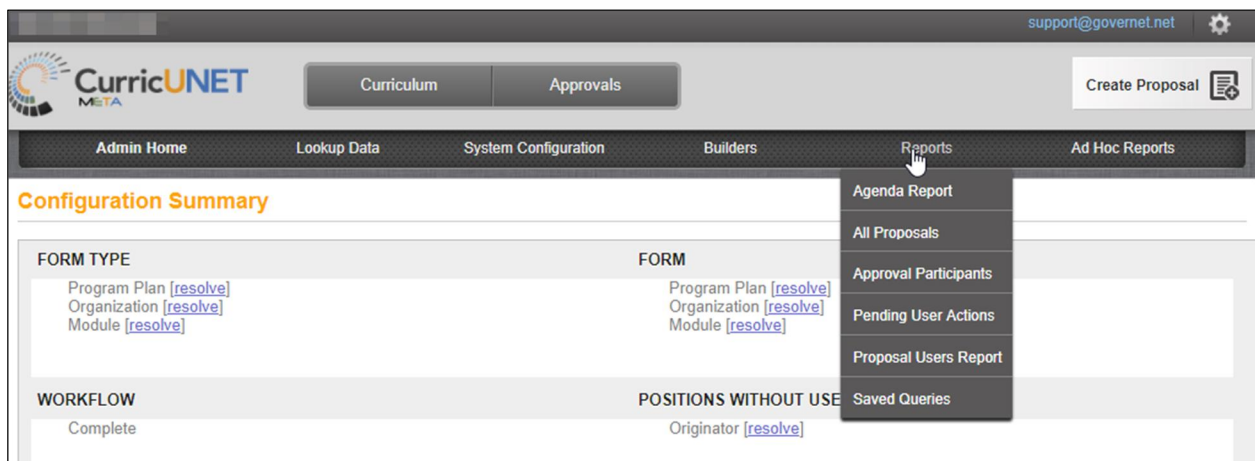
Report types include **Agenda Report**, **All Proposals**, **Approval Participants**, **Pending User Actions**, **Proposal Users Report**, and **Saved Queries**.

Agenda Report

Positions can be given the ability to have an agenda report created for them in the Positions screen under System Configuration. This ability is often given to committees or other positions where the proposals will be discussed in a meeting. The agenda report is designed to summarize all proposals waiting for approval by users with a certain position in the approval process. To create an agenda report, select the position for which the agenda is for from the dropdown menu.

Agenda Report

Position [▼] ←

Courses   Check All / Clear

Id		Title	Included in Package	Proposal Type	
No records to display.					

↻

Programs   Check All / Clear

Id	Title		Award Title	Included in Pacakge	Proposal Type	
No records to display.						

↻

                                                                          [Run Report]

Select the course and/or program proposals to be included in the agenda using the checkboxes to the left of the proposal title. Results may be paginated if there are many proposals at that position in the workflow. Click "Run Report" to create the report.

The agenda report will open in another tab in the browser, and can be printed or saved from there, or copied to a word document for editing. The agenda report includes basic information about the proposals.

Curriculum Chair Agenda Report
July 14, 2017

Call to Order

Approval of Agenda

Approval of Summary of Minutes

Course Approvals

New Course
MATH 531 Math for Advanced Manufacturing
  Units 0.00

  Description
  Students will solve problems and perform calculations encountered in the Advanced Manufacturing field. Basic math concepts are applied to problems such as conversion within the Metric system, conversion between Decimal and Metric systems, ratios, proportions, and other arithmetic operations.

Modify Course
MACH 100 Shop Math and Drawings (1976)
  Units 4.00

  Description
  Students study shop mathematics and drawings for the machine trades.

Program Approvals

Modify Program
Construction Technology
  Description
  Successful completion of the Associate in Arts in Construction Technology prepares students for entry into the construction trades, which require a technical skill and understanding of construction processes. Students planning on transferring to a four-year school should complete the AA Degree, which includes the 39-unit general education sequence of courses. Specific four-year institutions may require additional courses in the major to fulfill lower division requirements. This degree may not transfer to all universities, and students need to inquire of the universities if they have a bachelor's degree for their upper division course work. A grade of "C" or better is required in all major, certificate and major elective courses.

  CAREER OPTIONS:

• Building Inspector	• Estimator
• Cabinet Maker	• Furniture Making
• Carpenter	• Home Improvement Material Retail Sales
• Ceramic Tile Installer	
• Concrete Form Setter or Mason	• Insulation Installer

All Proposals

The All Proposals report shows all proposals that have been created in Meta with their status. Proposals imported on the initial Meta data import are not included.

Courses

ACCTG 020: Financial Accounting
Proposal Type: Modify Course
Originator:
Status: In Review
Launch Date: 12/13/2016 3:34 PM

ACCTG 021: Managerial Accounting
Proposal Type: Modify Course
Originator:
Status: In Review
Launch Date: 12/13/2016 3:34 PM

ACCTG 050: Personal Financial Planning
Proposal Type: New Course
Originator:
Status: Approved
Launch Date: 02/20/2017 2:45 PM

ACCTG 062: Cost Accounting
Proposal Type: Modify Course
Originator:
Status: Active
Launch Date: 03/16/2015 4:19 PM

ACCTG 063: Intermediate Accounting
Proposal Type: Modify Course
Originator:
Status: Active
Launch Date: 03/16/2015 4:20 PM

ACCTG 097: Introduction to Income Taxes
Proposal Type: Modify Course
Originator:
Status: Active
Launch Date: 03/16/2015 4:20 PM

ACCTG 098: Directed Study in Accounting
Proposal Type: Modify Course
Originator:
Status: Approved
Launch Date: 11/29/2016 3:09 PM

Approval Participants

The **Approval Participants** report will show the names and contact information of each individual involved in each step of the approval process, including all users with origination permissions on the subject. Select the desired proposal type from the **Process** dropdown menu, and subject type from the **Subject** dropdown menu.

Click View to generate the report. The report will show the names and contact information of each individual involved in each step of the approval process, including all users with origination permissions on the subject. (Note the illustration below was shortened. Your report may contain more or less information that shown here.)

Pending User Actions

The **Pending User Actions** report allows an admin user to easily determine where proposals are sitting in the approval process, and which faculty members may need a reminder that the proposal is waiting for their review.

Select the proposal from the dropdown menu, and click **View**.

All users at the current level of the workflow for that proposal will be listed with their email addresses.
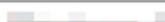
Proposal Users Report

The **Proposal Users Report** allows the admin to view all users involved in a proposal's approval process. To generate this report, select **Proposal User's Report** from the **Reports** dropdown menu. Choose the desired course, and click **View**.

Proposal | ACCT test3 - test ▼

[View]

The report will display all users involved with the particular proposal.

ACCT test3: test -- New Course Proposal	
Level: 1	

Position	User(s)
Originator	User, Admin

Level: 2	

Position	User(s)
Admin Clearinghouse	

Level: 3	

Position	User(s)
Content Review Committee Chair	
Library Director	Romero, Georg
Division Curriculum Committee Chair	
SLO Sub Committee Chair	
Articulation Officer	
Distance Education	
Dean, Career Education and Economic Development	
Dean/C&ESS	
Division Review	**NO USER FOUND**
SLO Sub Committee	**NO USER FOUND**
Division Curriculum Committee Member	

Level: 4	

Position	User(s)
Pre-Dean Clearinghouse	

Saved Queries

Saved Queries are Ad Hoc reports which have been saved for later use. See **Ad Hoc Reports** below for further information.

Ad Hoc Reports

The Ad Hoc reporting feature allows you to create customized, purpose-specific reports. To use the Ad Hoc reporting feature, click **Ad Hoc Reports**.

NOTE: The Ad Hoc feature is still in Beta mode, which means there are ongoing developments and improvements. Not all fields that may be on your forms will be available in the query tool, and many will not be named the same as on your forms. The field labels in this ad hoc tool are derived from the database column names, but because of the dynamic nature of the META system, many fields can be used for wildly different data points for different clients. It may take several attempts of selecting fields and previewing results until you find the fields you need. As the capabilities of this feature are improved, the tool will become easier and more intuitive to use. If you are unable to put together the report you need, please contact currIQūnet Support for assistance.
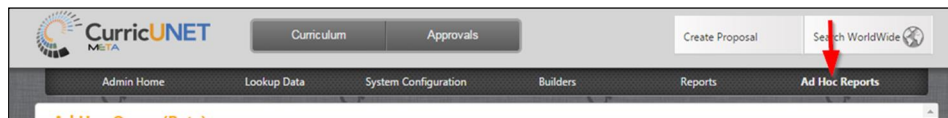
To create an Ad Hoc report, click **Add new column** to select each data point. Select one of the top level curriculum categories from the list that will appear.

NOTE: You cannot "mix and match" data points from this top level list, as the ad hoc system cannot cross curriculum boundaries at this time. You may report on Course data *or* Program data *or* Process data, for example, but not a combination of Course *and* Process data.
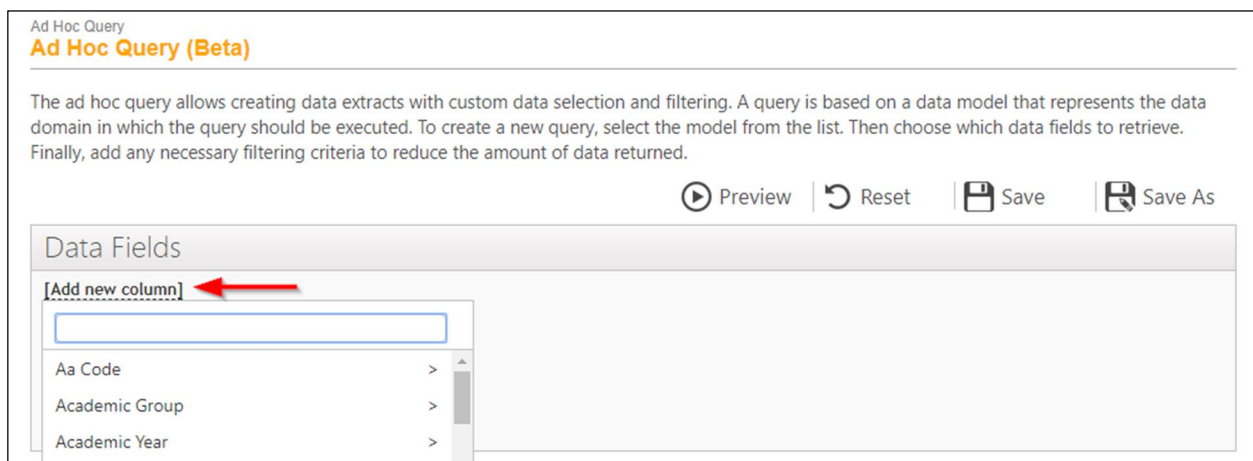
Use your mouse to hover over a data area, which will open an additional list of the fields that you may select from. Add each field individually.
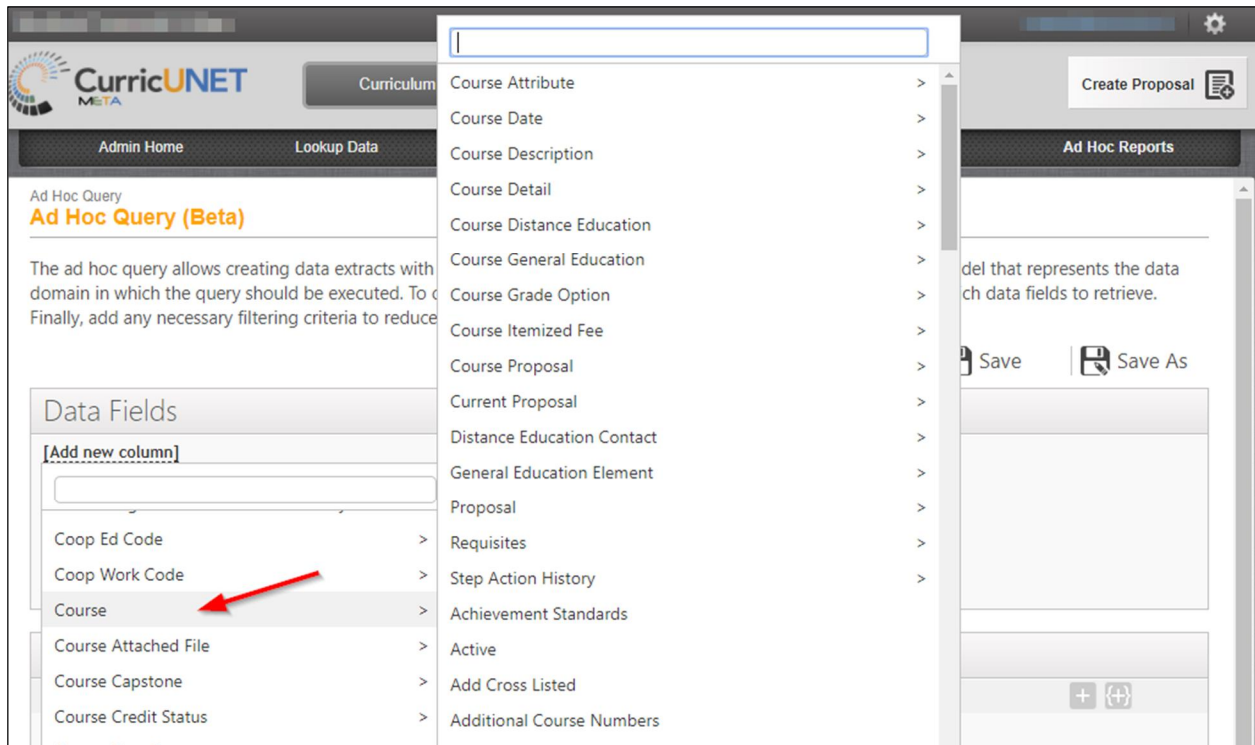
You may scroll through the list, or type in the bar at the top of the list to find the needed fields. In the example below, the word "subject" is searched, reducing the options available. If your search term returns no results, try using a synonym or related word. Remember that the field list is not customized to your form, and may be incomplete.

NOTE: The type to search function does not work in certain internet browsers, particularly Internet Explorer. If you are unable to type to search, switch to a different browser, such as Chrome or Firefox, or simply scroll through the list.
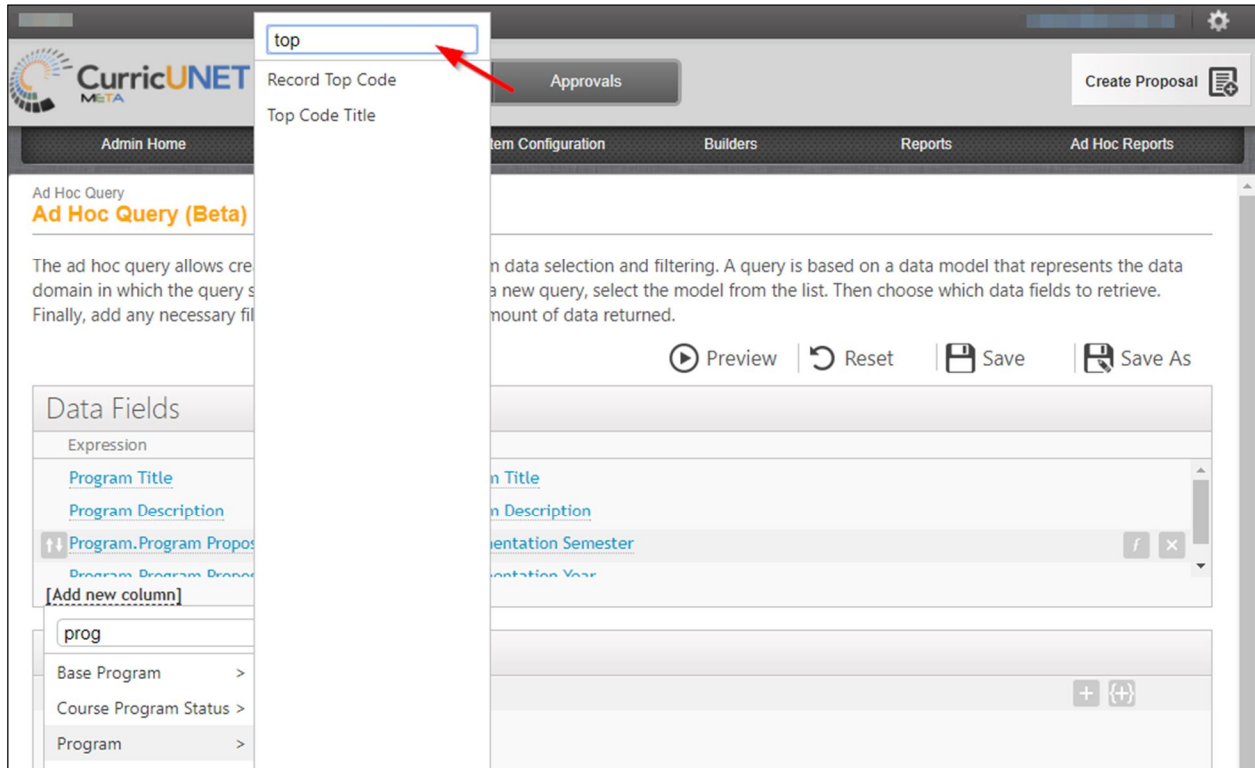
Select all data points required for this report. They will be listed in the **Data Fields** area. Under the **Title** heading, you may click each item to change the label of the column in the report. This is especially useful if the field label in the ad hoc tool is not related to what your institution uses them for.
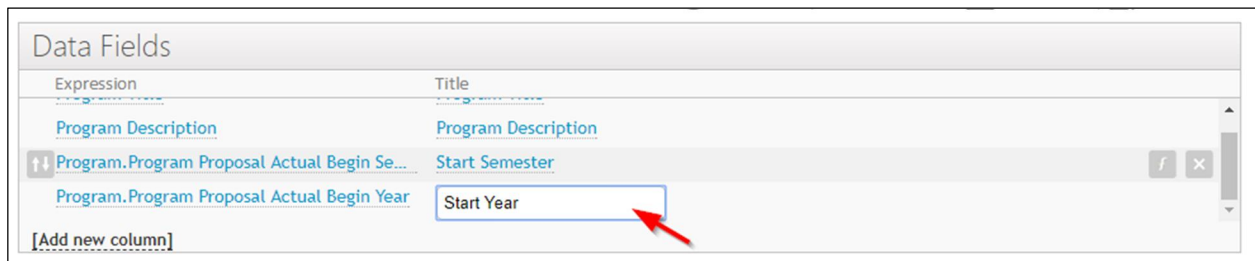
Use the **Up and Down Arrow** icon (▯) to the left of the field to reorder the data fields. You may also drag and drop the fields to reorder them. Click the gray "**X**" icon (▫) to the right of the field to remove it from the report.
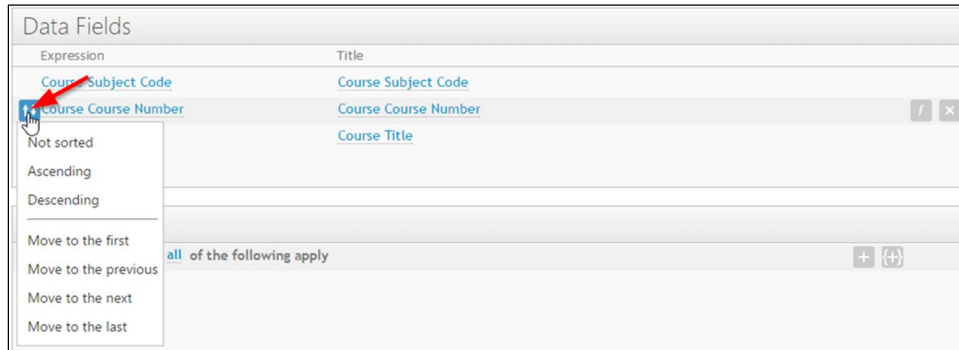
You may add filters to reduce the results if needed, or if practical.

NOTE: At this time, the Ad Hoc tool is limited in the number of results allowed, so you may need to filter by status or subject code, or by some other logical restriction, to receive any results.

Click **Add new condition** in the **Filters** section to add a filter to the report. Select one of the top level categories from the list that will appear.
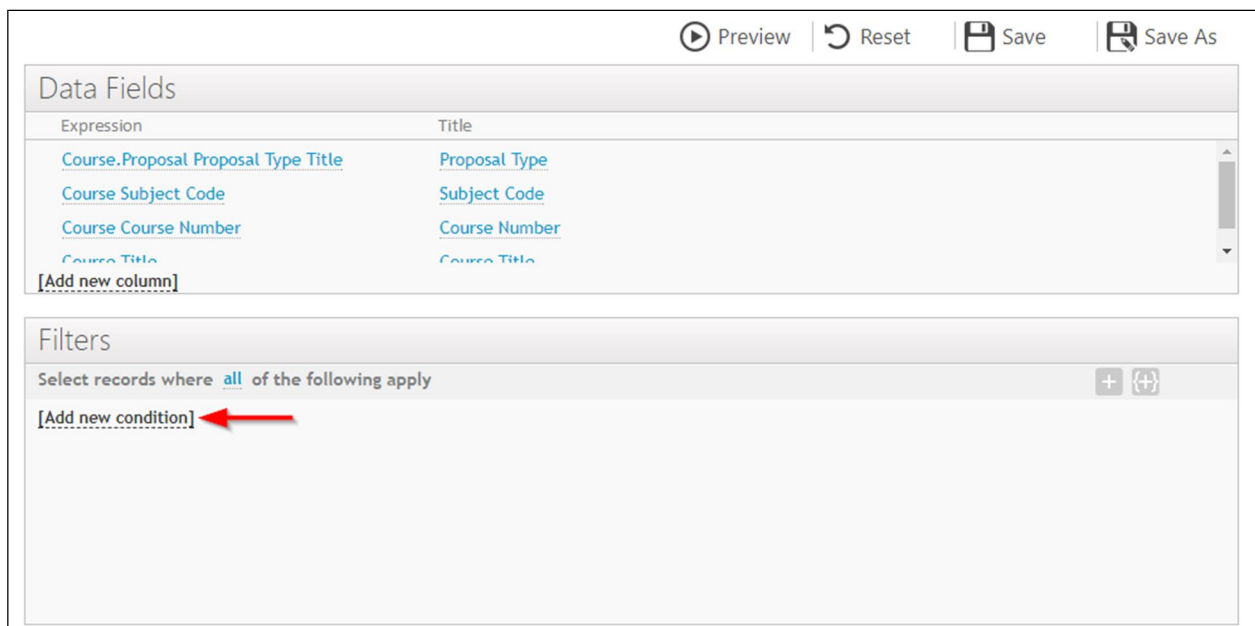
You may scroll through the list, or type keywords in the search bar at the top of the list to find the needed fields.

NOTE: The type to search function may not work in certain internet browsers, including Internet Explorer. If you are unable to type to search, switch to a different browser, or simply scroll through the list.

Select all conditions required for this report. They will be listed in the **Filters** area. Click each underlined phrase to change the search conditions.

When all Data Fields and Filters are in place, click **Preview**.

The query result will appear in the **Results** section. Click **Export to Excel** or **Export to CSV** to download the report results. This document will save to the Downloads folder on your computer, and can be opened with Microsoft Excel or similar programs. To sort, perform calculations, or print your reports, you must first export the results. To save this query to run this report again, click **Save**. If you are updating a previously saved query and want to save this version, but maintain the old version, click **Save As**.

Enter the **Name** for this saved query and a brief **Description**. Select the **Output Format** (Excel or CSV), and indicate if this query is **Open to Public**, meaning other Admin users can access this saved query. Click **Save** to save the query.

To view the saved queries, select **Reports**, then choose **Saved Queries** from the dropdown menu.
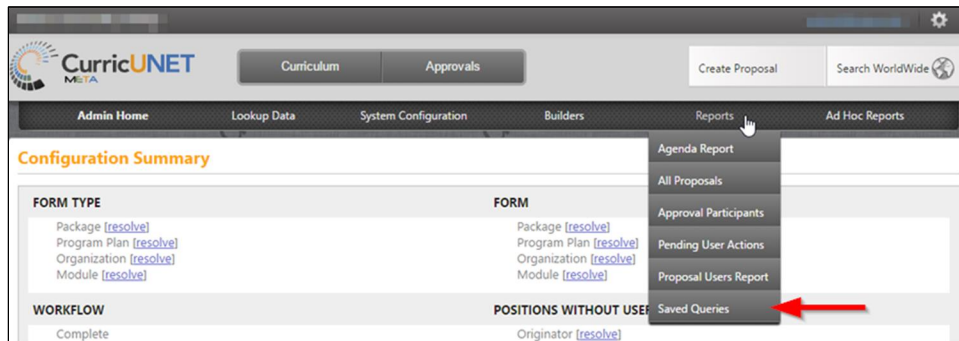
Common Ad Hoc Query Parts

Need	Course Data Field	Program Data Field	Notes
Proposal Originator	Course User First Name	Program User First Name	
	Course User Last Name	Program User Last Name	
Proposal Status	Course Status Alias Title	Program Status Alias Title	
Distance Education	Course Is Distance Ed		

Saved Queries

Saved Queries are Ad Hoc Reports that have been saved for later use. To view the saved queries, select **Reports**, then choose **Saved Queries** from the dropdown menu.
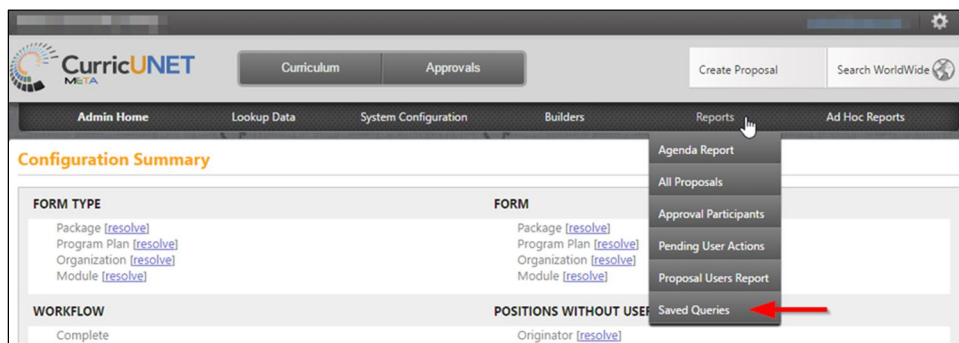
If there are no Saved Queries available, you will see the following screen.
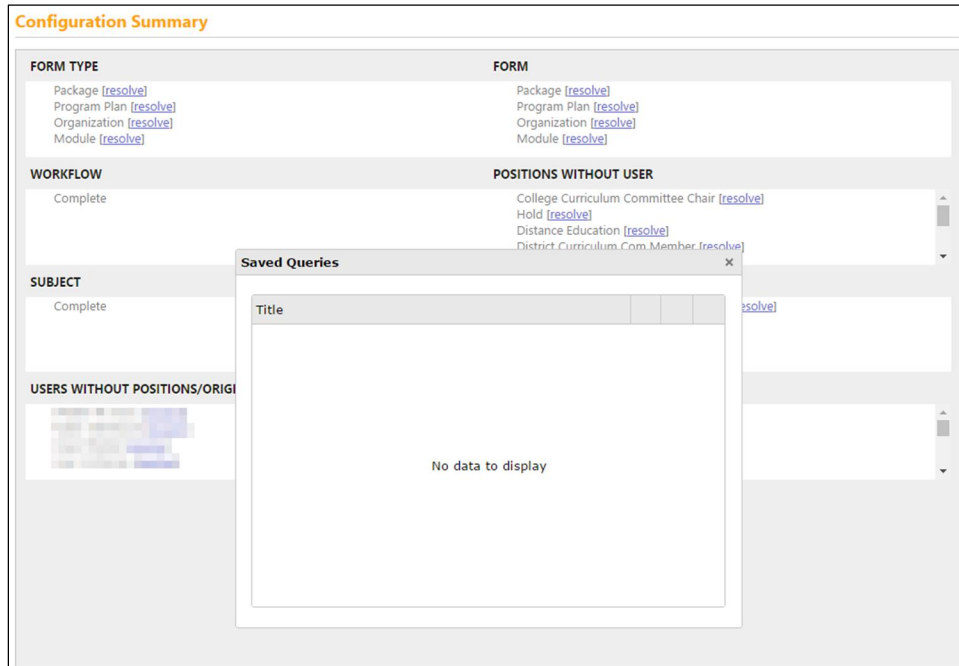
If Saved Queries are available, a list will be displayed. Click the **Magnifying Glass** icon (🔍) to download the report in the format it was saved as. Click the **Pencil** icon (✏️) to make changes to the query, or click the **Delete** icon (✖) to delete the query. If queries are deleted accidentally, you will need to rebuild them in the ad hoc tool. They cannot be retrieved. See the Ad Hoc Reports section of this manual for instructions on editing or building queries.

Course Outline of Record

First Date of Approval
Revision Approval
Date
Approval
Date
Effective Term: Winter, 2016

1. Course Discipline and Number: **ARTH1-UC 2216**
2. Course Title: **History**
3. Units:
   Lecture Units:
   Lab Units:
4. Catalog Description:

   This is the description for History.

5. Instruction Methodology:
6. Lecture Hours:
   Lab Hours:
   Total Contact Hours: 0
7. Grading: Graded
8. Course Prerequisite:
9. Course Corequisite:
10. Course Recommendation:
11. Repeatability:
12. Transfer Status:
13. Learning Outcomes:
    a. SLO
14. Course Lecture Content
    Course lecture
15. Course Lab Content
16. Methods of Evaluation
    a. Essays

    Critical thinking example(s):

17. Textbooks
18. Assignments

    Critical thinking example(s):

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Approvals

To view pending approvals, click the **Approvals** button at the top of any page. If you have any approvals waiting for you, there will be an orange box with a number in it attached to the **Approvals** button. The process is similar for all proposal types. The standard user without administrative privileges will not be able to see the **All Approvals** option. They will only be able to see approvals for which they are the originator or the next member of the approval process.

If you are the next user in the approval process, you will see this screen. If you wish to view the course, you can select **View Proposal**. You may also view any available reports by clicking the name of the report. Use the **Action** drop down menu to select the action you wish to take on the proposal, add any **Comments,** and then click **Commit**. When you make a comment it will become a permanent part of the comments once you click commit

Committing your actions will move the proposal to the next part of the approval process. If you reject the proposal, it will remove the proposal from the system. If you request changes, it will send the proposal back to the originator. Once these changes have been made, the proposal will return to the person who requested the changes.

The **History** report shows what has happened in the approvals process for this proposal and who is next in line, the time and date each action was taken on the proposal. It also shows the actions that have been taken on this proposal and a permanent history of comments.

Make sure you see a confirmation message to confirm that when you clicked **Commit,** the action was received. The confirmation will appear in a popup window. You must click **Close to**

continue to ensure your actions are committed. **This is vital.** *If you do not see this popup, your action has not been saved, and you must perform your action again.*

To implement the course and add it to the college's offerings, the last user in the approval process (or an administrator) must select **Implement** (1) from the action menu. Select the **Publish date** (the date the course will become active) by clicking on the **Calendar** icon (2). Add any comments necessary and click **Commit** (3).

You must confirm the final action by clicking **Activate**. **This is a vital action.** If you do not see this popup, your action has not been saved, and you must perform it again.
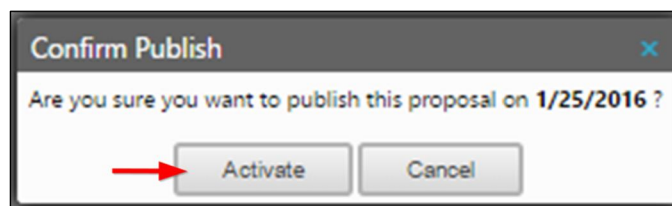
Administrative Action in Approval Workflows

Administrative users have the ability to take action in the proposal workflows on behalf of other users. To take administrative action on a proposal, select the **Approvals** button.
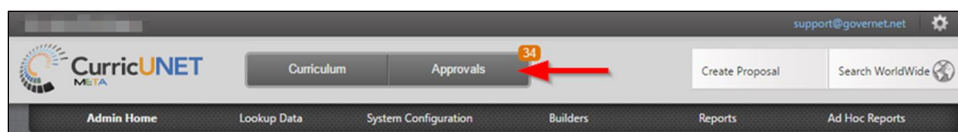
The Approvals screen will first show **My Approvals**, the items assigned to you for review. To view all proposals in review at your institution, select **All Approvals**.

The **All Approvals** screen lists all proposals currently in an approval process. On both the **My Approvals** and **All Approvals** screens, items have been returned to the originator for changes will be highlighted in pink.

You may filter the proposals by using any of the dropdown menus or by entering search terms in the textbox, then click **Search**.

Select the proposal you need to take action on by clicking the row containing the proposal.

Administrative users can take action on proposals in two ways.

To take action on the current level, select an option from the **Take Action as an Administrator** dropdown menu. Select the position for which you wish to take action. Click **OK** after making your selection.

Using this menu, you can also **Delete** this proposal, which will remove it from the META system entirely, or **Unlaunch** the proposal, which removed the proposal from the workflow and reverts it to draft status. From there the originator can later launch it again to restart the workflow. You will be asked to confirm either of these choices.

After choosing a position, select the **Action** from the dropdown menu. Add any **Comments** to the textbox, and click **Commit**.

A red confirmation notification will appear on the approval history screen. Your action will be added to the workflow history and any users assigned to that position will be skipped.

Alternatively, you may manually move the proposal to a new level by selecting the link **Click here to administratively move proposal to new**.

Select the level you want to move the proposal to, scrolling to view all levels, and click **OK**. The current level is highlighted purple. Proposals can be moved either forward or back as many levels as necessary in the workflow. The proposal will follow the workflow as usual from that point.

Optional META Functionalities

Contact currIQūnet Support to configure the following functionalities: Comment Moderation, Course Level Validation or Curriculum Subtypes, Course Reactivation, or Public Search.

Comment Moderation

Administrative users have the ability to moderate comments in the approval histories of in review or completed proposals. Moderated comments are not deleted, only hidden from the view of non-admin users. If this function is configured, click **Hide** for each comment. The green **Eye** icon (👁) indicates the comment is visible. The red **Sight Disabled** icon (👁) indicates the comment is hidden.

To show previously hidden comments, click **Show** to unhide the comment.

A non-admin user will see that the action has been taken, but will not see the moderated comment.

Curriculum Subtypes and Course Level Validation

Curriculum Subtypes allow a curriculum type, such as a course, to be further divided. This feature is frequently used to divide credit and non-credit courses, or different levels of programs. Course Level Validation allows for validation of the course number based on defined parameters for various course types. For instance, undergraduate course proposals could require a course number between 0 and 400, graduate course proposals between 401 and 600, etc., depending on the requirements of your institution. These criteria are assigned to the Proposal Types.

If a user attempts to create a proposal that does not meet the criteria of the proposal type, they will receive a validation message, as seen below, and be prevented from creating the proposal.

Course Reactivation

The Course Reactivation feature allows admin users to use a modification proposal to reactivate historical courses that have no active version in their course family. To create a Reactivation Proposal, in the first step of the Create Proposal wizard, select a **Course Modification** proposal type, and click **Next**.

Select the **Reactivation Proposal** checkbox, then **Search** for the course to be reactivated, using the **Subject** dropdown menu and **Course Title** textbox as needed.

Select the course to be reactivated, and click **Next**.

Verify you have selected the correct course and click **Create Proposal**.

A proposal will be created and can be edited and launched like any modification proposal.

Public Search

Public Search allows your institution to embed a currIQūnet search window in your institution's website. Generally, students and the general public don't have access to any part of META, unless the institution has public search enabled. In this case, they can search active curricula and have access to certain reports, generally course and program outlines. Upon activation, you will be provided with a HTML snippet to use as needed.

To use public search, select the curriculum type to search. The selected curriculum type will be highlighted red. Enter the search criteria and click **Search.**

The curriculum proposals with active status that meet the search criteria will appear below the search fields. Access reports by clicking the page icon and selecting the required report from the list. View additional information about the curriculum by clicking **more...**.