

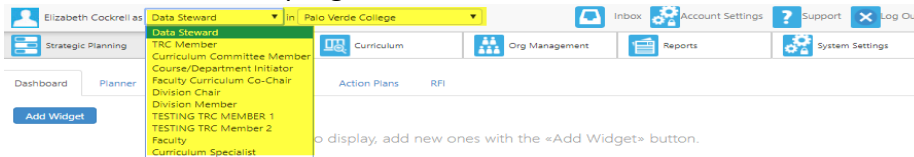
Reviewer and Approver in eLumen Training Guide

This training will guide the discussion and give specific directions for using Curriculum for roles that will review and approve proposal workflows for the creation, revision, or inactivation of courses or programs.

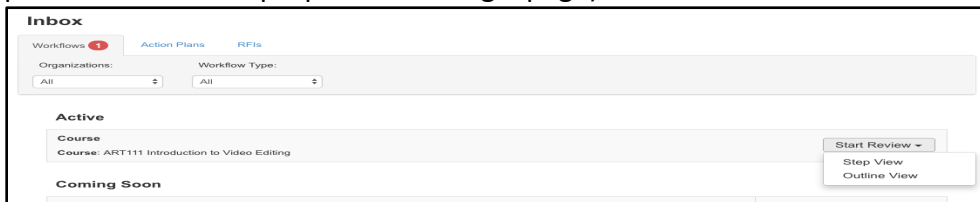
*****Reviewer and Approver roles are: Articulation Officer, Distance Education Coordinator, Division Members, Division Chair, TRC Members, and Curriculum Members*****

Workflow Management

All workflows for courses, programs, and SLOs that are waiting for your review will appear in both the Workflows tab within your Inbox and on the Curriculum Dashboard. Make sure you select the role that you need to review or approve in (some have multiple roles and will have to do this for each when its time for that specific role). Navigate to the Inbox to complete the review of a course or program workflow.



Under the Active heading is where all of the workflows that require your immediate attention are at. To Review a workflow select Start Review and choose either the Step View (which presents each section of the proposal on a separate screen) or the Outline View (which presents the entire proposal on a single page).



Below the Active workflows eLumen also lists the current Stage of other program proposals that might be of interest including those Coming Soon, Processing, or Recently Reviewed.



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Courses

Reviewing, Editing, and Approving

eLumen provides three types of functionality for reviewers that can be customized for each part within the sections of a proposal. As a reviewer, you will always be able to see all of the sections and parts of the proposal. In each section, you will see buttons outlining your options.

The screenshot shows the 'Cover Info' section of a course proposal. It is divided into two main parts: 'General Information' and 'Faculty Requirements'. The 'General Information' section includes fields for Course Code (CB01), Course Title (CB02), TOP Code (CB03), CIP Code, Department, Course Description, and SAM Priority Code (CB09). The 'Faculty Requirements' section includes a field for Master Discipline Preferred. Buttons for 'Edit', 'Approve', and 'Request Change' are visible at the top and bottom of the sections.

Review

When viewing the proposal, you will see a review button in each part you are assigned. Please review the contents of that section for accuracy and check the Review box to acknowledge that you have seen the content.

Leave any feedback or corrections in the comments box at the end of the section and select **Add Comment**. You will see any previous comments from other reviewers.

You cannot submit the workflow until you select **Review** on all parts.

Multiple review roles can be added to a single stage, and the workflow will not progress until all roles have reviewed the course. Please complete your reviews in a timely manner.

Select **Review All** to automatically select Review on all parts of the proposal.

The screenshot shows the 'Cover Info' section of a course proposal for 'MATH103 Introduction to Applied Calculus I'. It includes fields for Course Code (CB01), Course Title (CB02), TOP Code (CB03), CIP Code, Department, Course Description, and SAM Priority Code (CB09). A 'Review' button is visible at the top right of the 'General Information' section.

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Approve (Send Back Feature)

If you are assigned the Approve action for a part of a proposal, your Review button in each section will be replaced with the option to either **Approve** or **Request Change**.

The screenshot shows the 'Proposal Details' form. At the top right, there are two buttons: 'Approve' (highlighted in blue) and 'Request Change'. The form includes fields for 'Author(s)' (Marianna Padilla), 'Proposal Start' (Spring 2019), and 'Submission Rationale' (Change to Content, New Course Materials). There is also a 'Notes for Submission' text area and an 'Attachments' section with an 'Upload Files' button.

If Request Change is chosen for **any part**, the **Submit** button will change to **Request Change** and is available to send back at that time. It is best practice to review all areas before selecting **Request Change** to make sure the initiator is aware of all areas that need adjustment prior to sending it back.

Upon selecting **Request Change**, the workflow will return to the first stage and the parts marked Request Change will be highlighted in red for the proposal's originator. Once the proposal's originator submits their changes, the workflow will progress through the workflow again, continuing to the second stage.

This screenshot shows the same 'Proposal Details' form as above, but with a red border around the form area. The 'Request Change' button is now highlighted in orange. Below the form, there is a '0 Comment' section and a row of buttons: 'Cancel', 'Review all', 'Approve all', 'Save as Draft', and 'Request Change' (highlighted in orange).

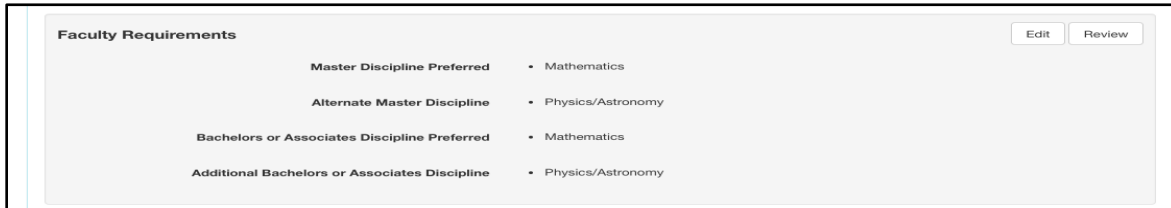
You can leave feedback or corrections in the Comment box at the end of the section by selecting **Add Comment**. You will see previous comments from other reviewers.

This screenshot shows the '0 Comment' section with a large text input area and an 'Add comment' button. Below this, there is a row of buttons: 'Cancel', 'Review all', 'Approve all', 'Save as Draft', and 'Submit' (highlighted in blue).

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Edit

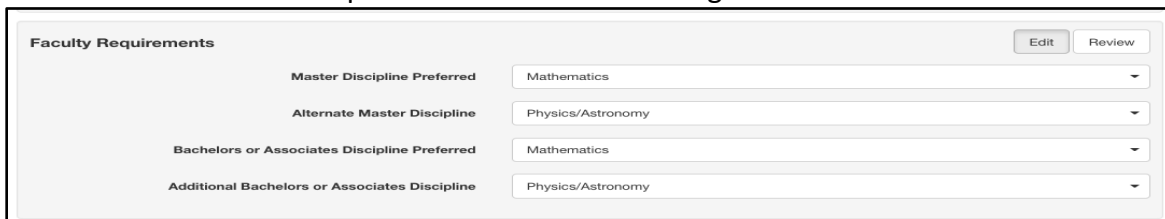
When a reviewer is assigned the Edit action for a part of a proposal, they will be able to change the content in those parts in addition to reviewing and commenting. Select the **Edit** button to make any changes.



The screenshot shows a form titled "Faculty Requirements" with two buttons, "Edit" and "Review", in the top right corner. The form contains four sections, each with a list of disciplines:

- Master Discipline Preferred**: Mathematics
- Alternate Master Discipline**: Physics/Astronomy
- Bachelors or Associates Discipline Preferred**: Mathematics
- Additional Bachelors or Associates Discipline**: Physics/Astronomy

Select the **Edit** button to open the fields to make changes.



The screenshot shows the same "Faculty Requirements" form, but now the "Edit" button is active and the dropdown menus are open, showing the selected disciplines:

- Master Discipline Preferred**: Mathematics
- Alternate Master Discipline**: Physics/Astronomy
- Bachelors or Associates Discipline Preferred**: Mathematics
- Additional Bachelors or Associates Discipline**: Physics/Astronomy

To Submit to the Next Stage

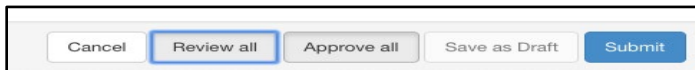
You cannot submit the workflow to the next stage of the workflow until you select Review or Approve on all parts of the workflow. The blue submit button will stay inactive until all parts of the workflow have been marked as reviewed. Select Approve All to automatically select Approve on all parts of the proposal.

Inactive Submit button:



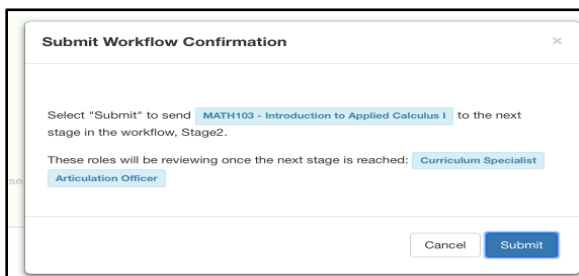
The screenshot shows a row of five buttons: "Cancel", "Review all", "Approve all", "Save as Draft", and "Submit". The "Submit" button is greyed out, indicating it is inactive.

Active Submit button:



The screenshot shows the same row of five buttons. The "Review all" button is highlighted with a blue border, and the "Submit" button is now blue, indicating it is active.

A confirmation box will appear informing you whether or not the course will be moving on to the next stage, or if additional roles need to review the course. Select **Submit** to confirm or cancel to go back to reviewing the course.



The screenshot shows a "Submit Workflow Confirmation" dialog box. It contains the following text:

Select "Submit" to send **MATH103 - Introduction to Applied Calculus I** to the next stage in the workflow, Stage2.

These roles will be reviewing once the next stage is reached: **Curriculum Specialist**, **Articulation Officer**

At the bottom, there are "Cancel" and "Submit" buttons.

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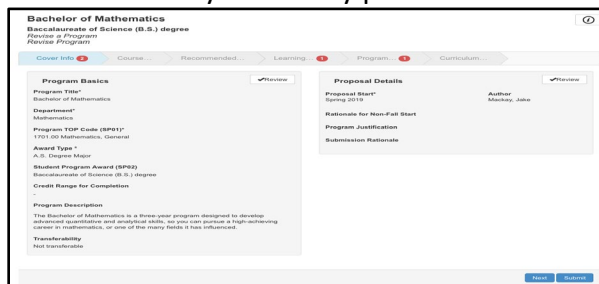
Programs

Participating in the workflow process for programs is similar, but not identical, to courses. Finding the program to review, entering the workflow and overall actions are the same.

Reviewing and Approving

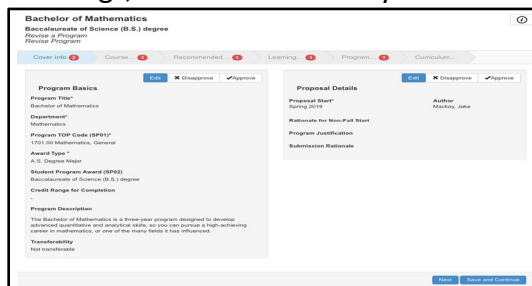
Review

When viewing the proposal, you will see a review button at the top of each section. Please do not hit review and submit unless you are a **Division Chair** or the **Faculty Co-Chair**. Doing this will advance the workflow before everyone has had a chance to review the program. If you have any comments or concerns regarding the proposed program, please bring them to your division chair, TRC meeting or email them to the Faculty Co-Chair. The program will only move to the next stage if all sections have been marked as reviewed. When the workflow is at the members review stage, the Curriculum Specialist will move the program forward to the next stage after the time allowed for review is completed. Select **Next** to move to the next tab. Use **Previous** to return to a tab you already passed.



Approve (Send Back Feature)

In a program workflow, the option to “Send Back” is available (Division Chair and Faculty Co-Chair only) by selecting “Disapprove” in an area of the program. Once you have reviewed the workflow, select “Send Back” at the bottom of the page. **DO NOT** use the “Table Workflow” option. If you have any comments or concerns please bring them to the TRC and Curriculum meetings, or email the faculty Co-Chair.



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Edit

Navigating from Tab to Tab

In a program workflow, the buttons at the bottom of the workflow are required to move from one tab to the next. Use **Next** or **Save and Continue** to move to the next tab. Use **Submit** after the final tab. If any part of the workflow remains unreviewed, the proposal will stay in the Inbox until all areas are reviewed/approved or the workflow is sent back.



To Submit to the Next Stage

Make sure all areas assigned have been reviewed, select **Next** or **Save and Continue** on each tab. Then select **Submit** at the end. Unlike a course workflow, the program workflow will not provide a confirmation message before moving on. You know the program has moved on when it is no longer visible in the Inbox.

After Submitting

Once you have reviewed all areas, and submitted the workflow to the next stage, you can watch the progress of the proposal on the Curriculum Dashboard. If you saved work as a draft or did not review all parts and will come back to finish later, return to the Inbox to pick up where you left off.

The screenshot shows the Curriculum Dashboard interface. At the top, there are tabs for 'Strategic Planning', 'Curriculum', and 'Reports'. Below these are sub-tabs for 'Inbox Workflows', 'Curriculum Dashboard', and 'Curriculum Library'. The 'Curriculum Dashboard' is active, and the 'Course' tab is selected. A 'Download Workflows as CSV' button is visible. The main section is titled 'Revision Course Workflows' and contains a table with 5 entries. The table has columns for Course Code, Course Title, Workflow Template, Workflow Status, and Chair Report. Below the table, there is a summary '5 Total' and a 'Show: 10 entries' dropdown. At the bottom, there is a section for 'Proposal Course Workflows'.

Course Code	Course Title	Workflow Template	Workflow Status	Chair Report	
ACCT101	Principles of Accounting I	Admin Quick-Flow	Stage 2: Review and Approve	None	Actions
COMPSC1104	Structures of Data	Revise a Course	Stage 5: External Review Approval	Tuesday, Sept 12	Actions
COMPSC1117	Mobile Application Building- IOS and Andriod	Revise a Course	Stage 3: Curriculum Committee Review	Tuesday, Sept 12	Actions
MATH101	Algebra I	Admin Quick-Flow	Stage 1: Propose Revision	Tuesday, Sept 12	Actions
MATH103	Introduction to Applied Calculus I	Revise a course	Stage 3: Curriculum Committee Review	None	Actions