

Curriculum Management (CM): A Step-by-Step Guide to Navigating CM

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Section A: About Curriculum Management (CM)

CM is the University's institutional Curriculum Management system.

At UTM, CM is used to manage the governance process for minor curriculum changes at the Undergraduate level. Examples of minor curriculum changes include: Adding New Courses; Deleting Courses; Renumbering/Reweighting of Courses; Change to Course Description/Name; Prerequisite Change; and edits to program requirement that do not alter the program's learning objectives, etc. Using CM, units can propose minor curriculum changes to be brought forward to the various Divisional Curriculum Committees (Sciences, Social Sciences, Humanities) and the Academic Affairs Committee for review and approval before being implemented.

NOTE: For UTM, Graduate course information and Major curriculum changes are not currently supported on CM.

Should you have questions about CM, the curriculum review process, and/or timelines at UTM, please contact the Program & Curriculum Assistant in the Office of the Dean.

Section B: Scope of Training Documentation

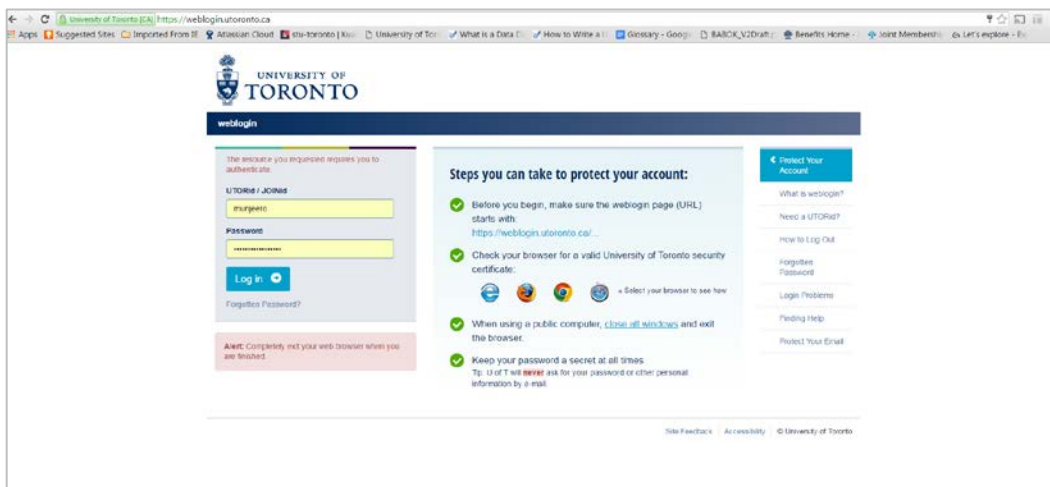
This manual will demonstrate how to perform various functions using CM.

This document contains specific references to the **University of Toronto Mississauga (UTM)** and its governance processes. In all cases, consultation with Divisional and Departmental guidelines is encouraged for completion of the forms.

This manual also includes a brief Glossary for CM, outlining certain terminology used in the system, such as the meaning of proposal, various status(es), etc.

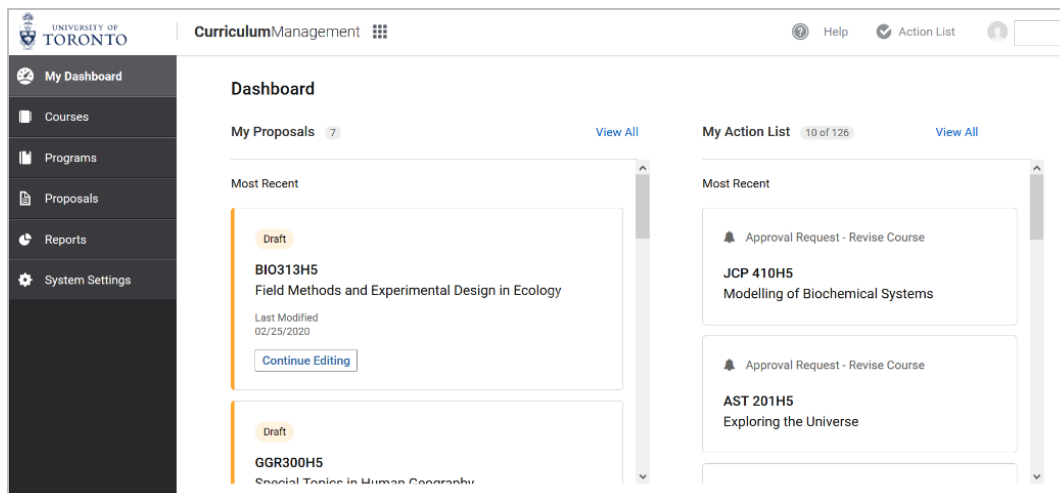
1.0 Log In to CM

1. Open your browser and enter the following url: <https://toronto.kuali.co/cm>
 - This is the live production site. Curriculum changes submitted here will proceed for governance approval. A staging site is also available at url: <https://toronto-stg.kuali.co/cm>
 - The following browsers are supported by CM: Chrome, Firefox, Internet Explorer, Safari, Edge.
2. Your **UTORid/Password** is required to access the CM web application.



3. The **CM Dashboard** (aka. homescreen) is displayed.

From here a user can use the left hand menu to navigate to courses and programs in the database.



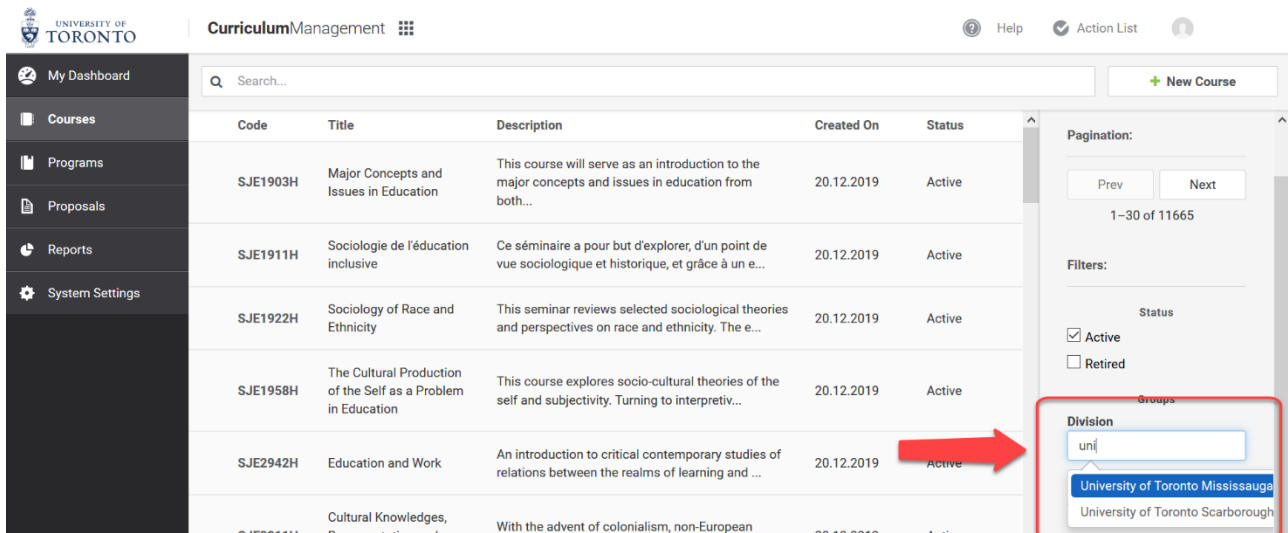
2.0 Search CM's Course & Program Repository

A user can search for existing courses or programs and curriculum proposals based on the:

- Number or code.
- Word or partial word in a title.
- Word or partial word in a course description.

Course information can be viewed by selecting from the search list.

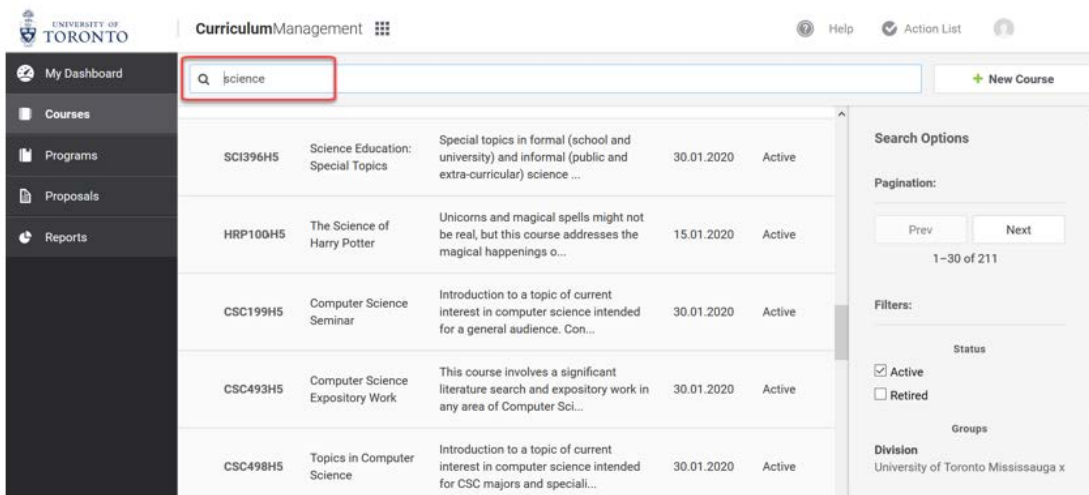
1. To search for courses or programs appearing only in your division **select the division** filter from the down list on the right hand menu. Type "University of Toronto Mississauga".



The screenshot shows the CurriculumManagement interface. On the left is a navigation menu with options: My Dashboard, Courses, Programs, Proposals, Reports, and System Settings. The main area displays a table of search results with columns: Code, Title, Description, Created On, and Status. A red arrow points to the 'Division' filter dropdown on the right, which is open and shows 'University of Toronto Mississauga' selected.

Code	Title	Description	Created On	Status
SJE1903H	Major Concepts and Issues in Education	This course will serve as an introduction to the major concepts and issues in education from both...	20.12.2019	Active
SJE1911H	Sociologie de l'éducation inclusive	Ce séminaire a pour but d'explorer, d'un point de vue sociologique et historique, et grâce à un e...	20.12.2019	Active
SJE1922H	Sociology of Race and Ethnicity	This seminar reviews selected sociological theories and perspectives on race and ethnicity. The e...	20.12.2019	Active
SJE1958H	The Cultural Production of the Self as a Problem in Education	This course explores socio-cultural theories of the self and subjectivity. Turning to interpretiv...	20.12.2019	Active
SJE2942H	Education and Work	An introduction to critical contemporary studies of relations between the realms of learning and ...	20.12.2019	Active
SJE2911H	Cultural Knowledges, Representation and	With the advent of colonialism, non-European	20.12.2019	Active

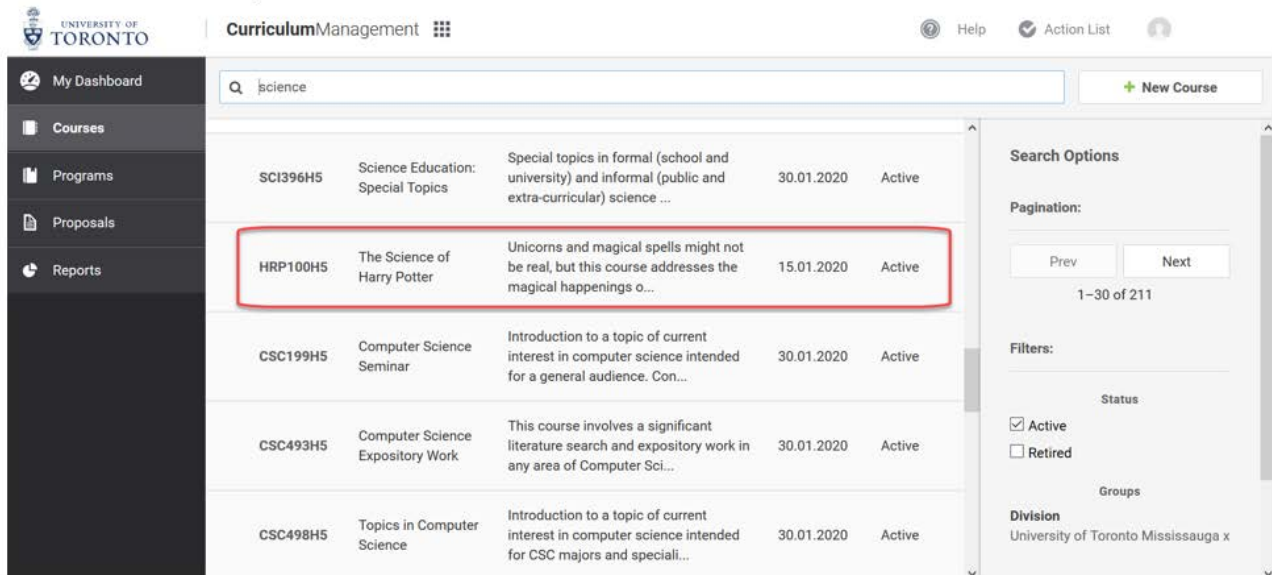
2. **Enter a search term.** This may be a word, a code, or a partial description. Search results are narrowed as more is typed. Results are sorted by relevance, not alphabetically.



The screenshot shows the CurriculumManagement interface with the search bar containing the text 'science'. The search results table is updated to show only courses related to science. The 'Division' filter is set to 'University of Toronto Mississauga'.

Code	Title	Description	Created On	Status
SCI396H5	Science Education: Special Topics	Special topics in formal (school and university) and informal (public and extra-curricular) science ...	30.01.2020	Active
HRP100H5	The Science of Harry Potter	Unicorns and magical spells might not be real, but this course addresses the magical happenings o...	15.01.2020	Active
CSC199H5	Computer Science Seminar	Introduction to a topic of current interest in computer science intended for a general audience. Con...	30.01.2020	Active
CSC493H5	Computer Science Expository Work	This course involves a significant literature search and expository work in any area of Computer Sci...	30.01.2020	Active
CSC498H5	Topics in Computer Science	Introduction to a topic of current interest in computer science intended for CSC majors and speciali...	30.01.2020	Active

3. Click on the row to open the item.

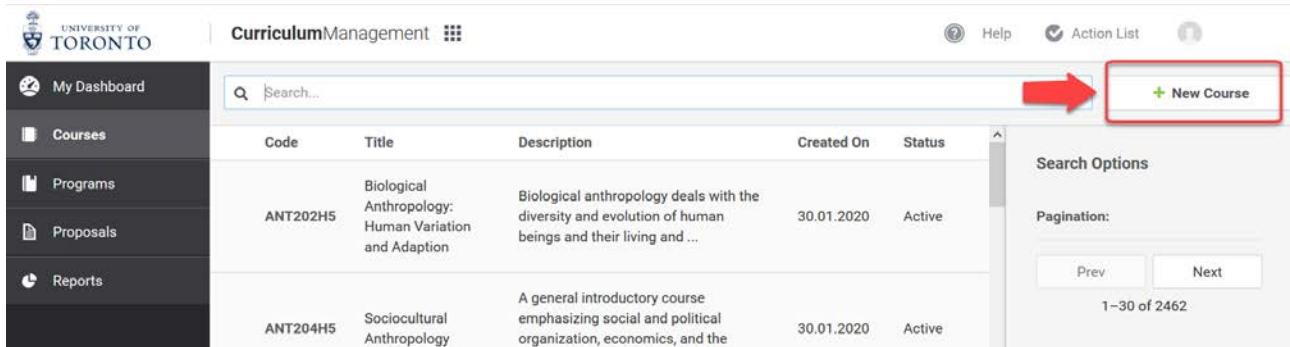


The screenshot shows the CurriculumManagement interface. On the left is a navigation menu with options: My Dashboard, Courses, Programs, Proposals, and Reports. The main area features a search bar with 'science' entered and a '+ New Course' button. Below the search bar is a table of courses. The row for 'HRP100H5' is highlighted with a red border. To the right of the table is a 'Search Options' sidebar containing pagination controls (Prev, Next, 1-30 of 211) and filter options for Status (Active, Retired) and Groups (University of Toronto Mississauga x).

Course ID	Course Name	Description	Start Date	Status
SCI396H5	Science Education: Special Topics	Special topics in formal (school and university) and informal (public and extra-curricular) science ...	30.01.2020	Active
HRP100H5	The Science of Harry Potter	Unicorns and magical spells might not be real, but this course addresses the magical happenings o...	15.01.2020	Active
CSC199H5	Computer Science Seminar	Introduction to a topic of current interest in computer science intended for a general audience. Con...	30.01.2020	Active
CSC493H5	Computer Science Expository Work	This course involves a significant literature search and expository work in any area of Computer Sci...	30.01.2020	Active
CSC498H5	Topics in Computer Science	Introduction to a topic of current interest in computer science intended for CSC majors and speciali...	30.01.2020	Active

3.0 Create a New Course Proposal

1. Click the **New Course** button from the Course Menu.




The screenshot shows the CurriculumManagement interface. On the left is a navigation menu with 'My Dashboard', 'Courses', 'Programs', 'Proposals', and 'Reports'. The main area displays a table of courses. A red box highlights the '+ New Course' button in the top right corner, with a red arrow pointing to it.

Code	Title	Description	Created On	Status
ANT202H5	Biological Anthropology: Human Variation and Adaption	Biological anthropology deals with the diversity and evolution of human beings and their living and ...	30.01.2020	Active
ANT204H5	Sociocultural Anthropology	A general introductory course emphasizing social and political organization, economics, and the	30.01.2020	Active

2. Complete all required and/or mandatory form fields following departmental and divisional guidelines.

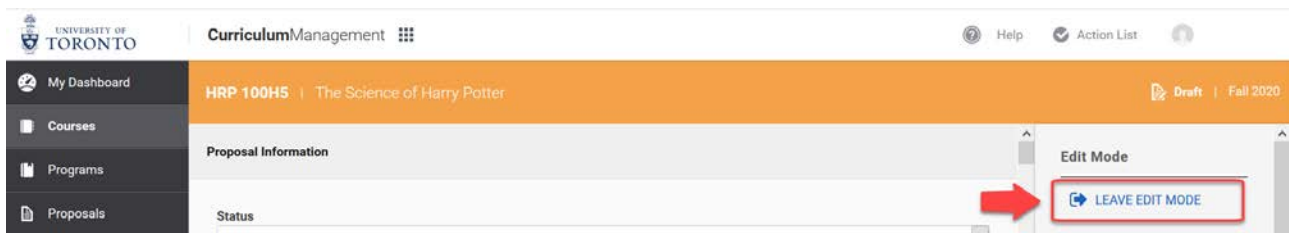
Note: See Appendix A and Appendix B for an overview of the form fields and instructions on what is required at the divisional level. Departments may have additional guidelines that apply.

Tips for completing the course form:

- **Mandatory fields** are indicated with a red asterisk*. They include Version Start Session (including session, year), Course Designator, Number, Level of Instruction, Calendar Title, and Division.
- **Help Bubbles**  featured throughout the form provide additional information and instruction to assist with completing the course form.
- **The user must ensure all of the information entered into the form is correct.** CM will not generate an error message for fields that are not mandatory when the user saves the proposal or submits it for approval.
- **Changes are saved in CM as the user enters data.** There is no 'Save' or 'Submit' button to save changes.

3. To exit the proposal, click **Leave Edit Mode**, shown on the top of the right hand menu.

Once the user leaves edit mode the proposal is added to the list of draft proposals.

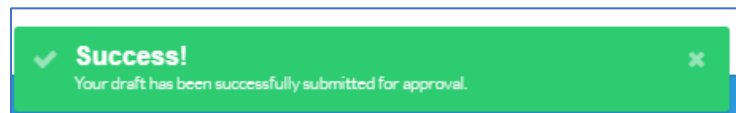


The screenshot shows the CurriculumManagement interface in edit mode for a course proposal. The top bar displays 'HRP 100H5 | The Science of Harry Potter' and 'Draft | Fall 2020'. The main area shows 'Proposal Information' and 'Status'. A red box highlights the 'LEAVE EDIT MODE' button in the top right corner, with a red arrow pointing to it.

4. If you are ready to submit the course proposal, click **Submit for Approval**.



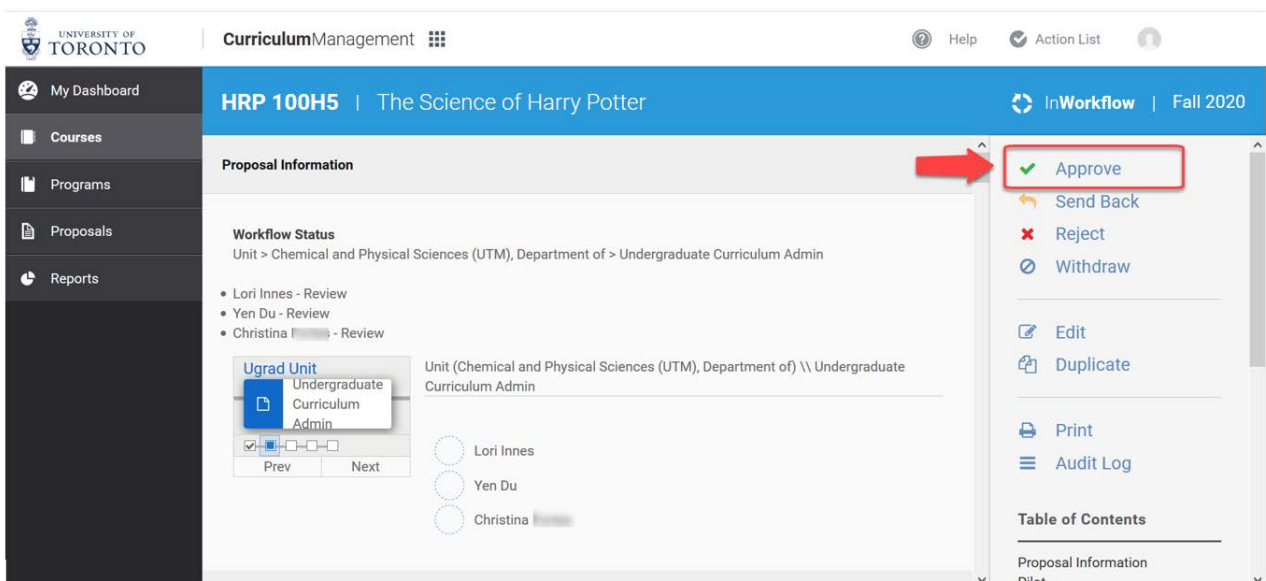
If **Submit for Approval** is selected and the proposal is completed correctly, the **Success message** should be displayed as follows:



5. For the proposal to enter into the governance review process (aka. The **Workflow**), the Unit must **Approve** the proposal as a first step before the Division.

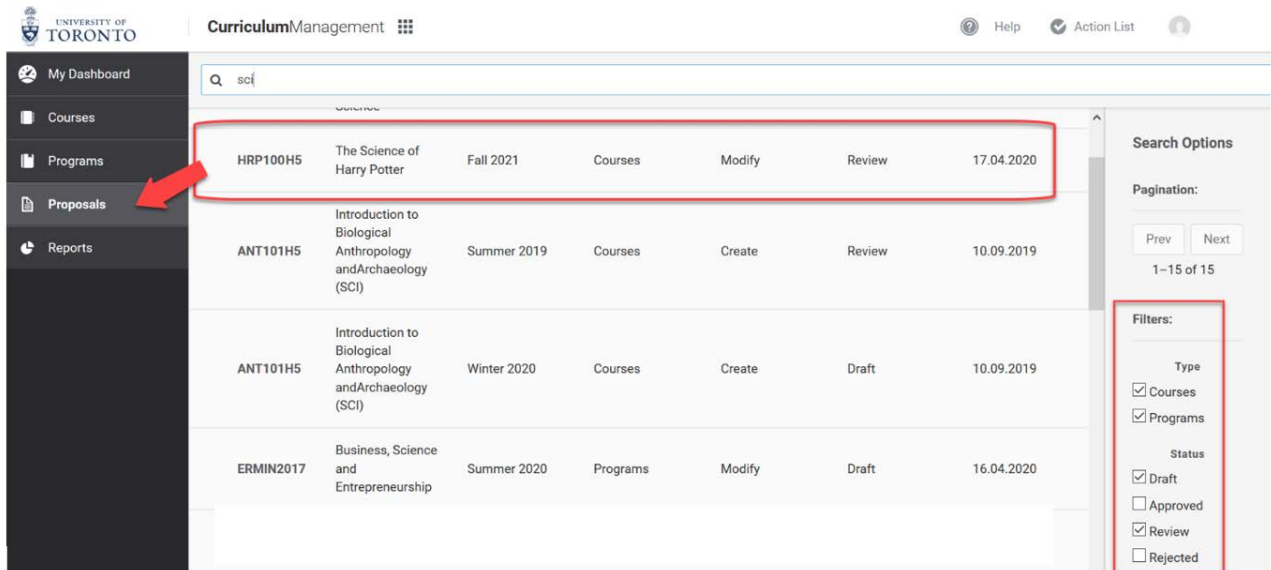
The proposal will go through several stages of approval depending on the type of governance required for the particular change being made. The process to go through approval and workflow is covered later in this document in **Section 7.0**.

If an error was made and you would like to withdraw the proposed changes, click **Withdraw** from the menu on the right hand menu.



6. To view the status of your new course proposal, while it is in the workflow, search for it under **Proposals**.

Note: Filters on the right hand menu need to be selected to display the course under review.



The screenshot shows the CurriculumManagement interface with a search bar containing 'sci'. The main content area displays a table of course proposals. A red box highlights the first row of the table, and a red arrow points to the 'Proposals' menu item in the left sidebar. A second red box highlights the 'Filters' section on the right side of the page.

Course ID	Course Name	Term	Type	Action	Status	Date
HRP100HS	The Science of Harry Potter	Fall 2021	Courses	Modify	Review	17.04.2020
ANT101HS	Introduction to Biological Anthropology and Archaeology (SCI)	Summer 2019	Courses	Create	Review	10.09.2019
ANT101HS	Introduction to Biological Anthropology and Archaeology (SCI)	Winter 2020	Courses	Create	Draft	10.09.2019
ERMIN2017	Business, Science and Entrepreneurship	Summer 2020	Programs	Modify	Draft	16.04.2020

Filters:

Type

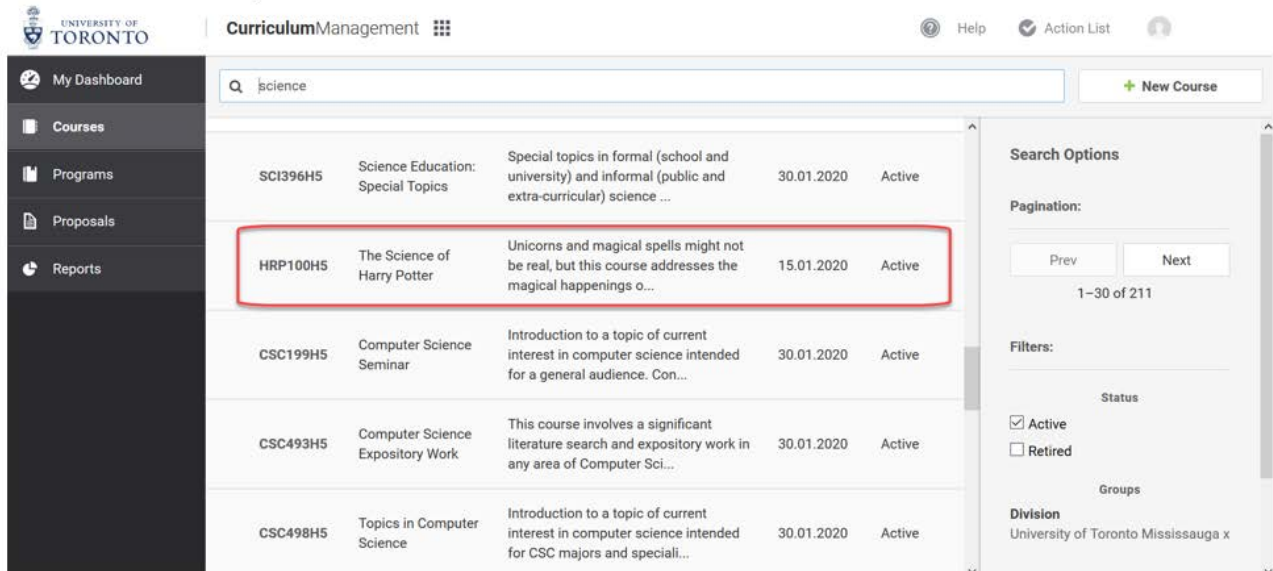
- Courses
- Programs

Status

- Draft
- Approved
- Review
- Rejected

4.0 Modify an Existing Course

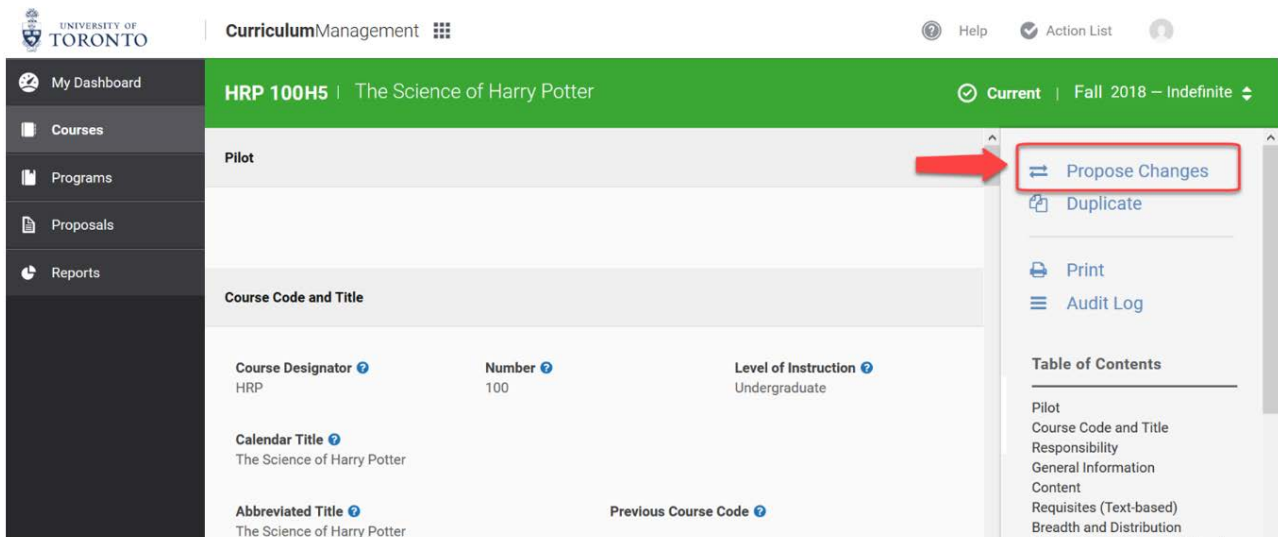
1. Search for the Existing Course and click on the row to open the item.



The screenshot shows the CurriculumManagement interface with a search bar containing 'science'. A table of search results is displayed, with the row for 'HRP100H5' highlighted with a red box. The right-hand sidebar shows search options, pagination (1-30 of 211), and filters for Status (Active, Retired) and Division (University of Toronto Mississauga x).

Course Code	Course Title	Description	Start Date	Status
SCI396H5	Science Education: Special Topics	Special topics in formal (school and university) and informal (public and extra-curricular) science ...	30.01.2020	Active
HRP100H5	The Science of Harry Potter	Unicorns and magical spells might not be real, but this course addresses the magical happenings o...	15.01.2020	Active
CSC199H5	Computer Science Seminar	Introduction to a topic of current interest in computer science intended for a general audience. Con...	30.01.2020	Active
CSC493H5	Computer Science Expository Work	This course involves a significant literature search and expository work in any area of Computer Sci...	30.01.2020	Active
CSC498H5	Topics in Computer Science	Introduction to a topic of current interest in computer science intended for CSC majors and speciali...	30.01.2020	Active

2. Select **Propose Changes** from the right hand menu.

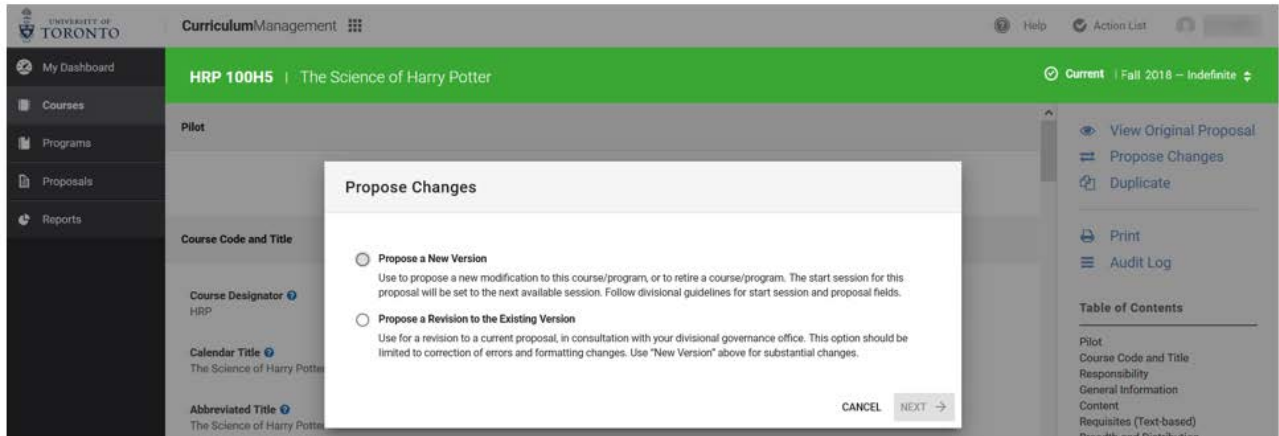


The screenshot shows the details for the course 'HRP 100H5 | The Science of Harry Potter'. The course is marked as 'Current' and is for 'Fall 2018 - Indefinite'. A red arrow points to the 'Propose Changes' button in the right-hand menu. Other buttons include 'Duplicate', 'Print', and 'Audit Log'. The 'Table of Contents' on the right lists sections like Pilot, Course Code and Title, Responsibility, General Information, Content, Requisites (Text-based), and Breadth and Distribution.

Field	Value
Course Designator	HRP
Number	100
Level of Instruction	Undergraduate
Calendar Title	The Science of Harry Potter
Abbreviated Title	The Science of Harry Potter
Previous Course Code	

3. The following pop up box will appear:

- Select **Propose a New Version** if you are proposing a curricular change.
- Select **Propose a Revision to the Existing Version** if you are proposing an editorial change.




4. The course form is now open for editing. Input your proposed changes following departmental and divisional guidelines.

When proposing changes to a course, best practice is to review and update ALL course information to ensure the record for the course is accurate and up-to-date.

Note: Refer to Appendix A and Appendix B for an overview of the form fields and instructions on what is required at the divisional level. Departments may have additional guidelines that apply.

Tips for completing the course form:

- **Mandatory fields** are indicated with a red asterisk*. They include Version Start Session (including session, year), Course Designator, Number, Level of Instruction, Calendar Title, and Division.
- **Help Bubbles**  featured throughout the form provide additional information and instruction to assist with completing the course form.
- **The user must ensure all of the information entered into the form is correct.** CM will not generate an error message for fields that are not mandatory when the user saves the proposal or submits it for approval.
- **Changes are saved in CM as the user enters data.** There is no 'Save' or 'Submit' button to save changes.

- To exit the proposal, click **Leave Edit Mode**, shown on the top of the right hand menu.

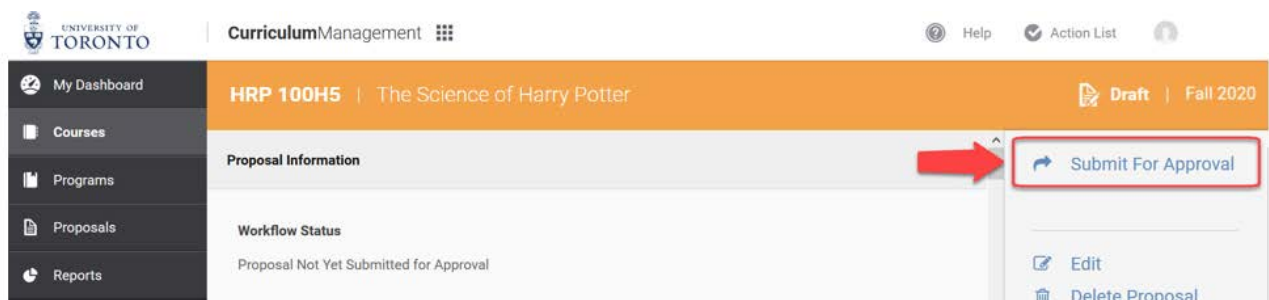
Once the user leaves edit mode the proposal is added to the list of draft proposals.



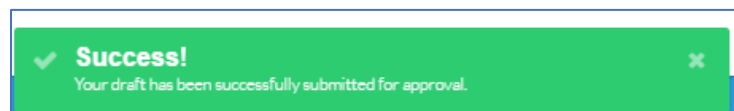
- Review your changes (highlighted in yellow).



- If you are ready to submit the course proposal, click **Submit for Approval**.



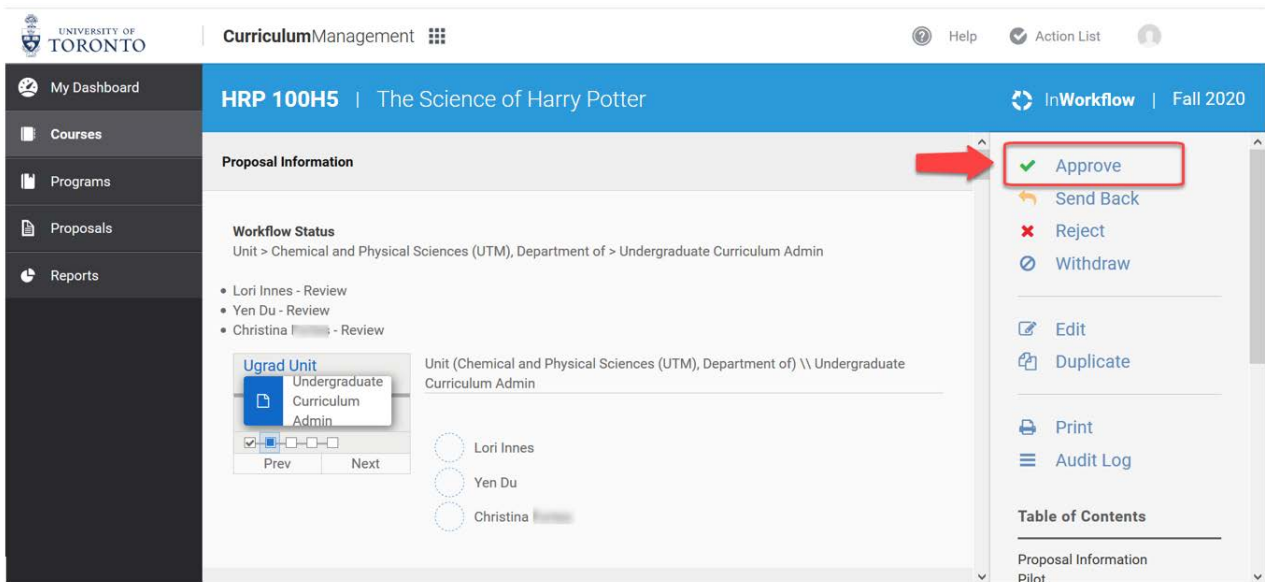
If **Submit for Approval** is selected and the proposal is completed correctly, the **Success message** should be displayed as follows:



8. For the proposal to enter into the governance review process (aka. the **Workflow**), the Unit must **Approve** the proposal as a first step before the Division.

The proposal will go through several stages of approval depending on the type of governance required for the particular change being made. The process to go through approval and workflow is covered later in this document in **Section 7.0**.

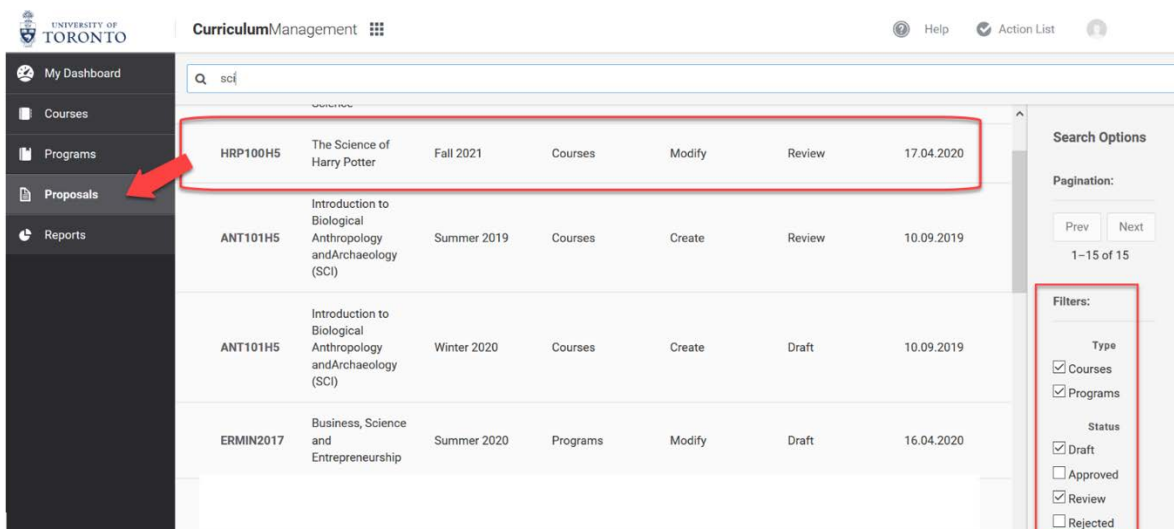
If an error was made and you would like to withdraw the proposed changes, click **Withdraw** from the right hand menu.



The screenshot shows the 'CurriculumManagement' interface for 'HRP 100H5 | The Science of Harry Potter'. The 'Workflow Status' section shows the unit is 'Undergraduate Curriculum Admin' and lists reviewers: Lori Innes, Yen Du, and Christina. A right-hand menu contains several actions: 'Approve' (highlighted with a red box and a red arrow), 'Send Back', 'Reject', 'Withdraw', 'Edit', 'Duplicate', 'Print', and 'Audit Log'. A 'Table of Contents' section is also visible at the bottom right.

9. To view the status of your course change proposal, while it is in the workflow, search for it under **Proposals**.

Note: Filters on the right hand menu need to be selected to display the course under review.



The screenshot shows the 'Proposals' section of the CurriculumManagement interface. A search bar contains 'sci'. A table lists proposals, with the first row highlighted in a red box:

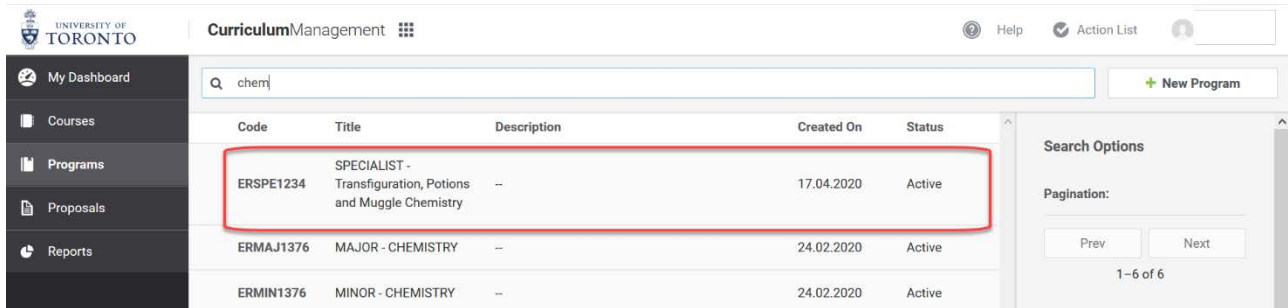
Course ID	Course Name	Term	Type	Action	Status	Date
HRP100H5	The Science of Harry Potter	Fall 2021	Courses	Modify	Review	17.04.2020
ANT101H5	Introduction to Biological Anthropology and Archaeology (SCI)	Summer 2019	Courses	Create	Review	10.09.2019
ANT101H5	Introduction to Biological Anthropology and Archaeology (SCI)	Winter 2020	Courses	Create	Draft	10.09.2019
ERMIN2017	Business, Science and Entrepreneurship	Summer 2020	Programs	Modify	Draft	16.04.2020

On the right-hand side, the 'Search Options' section shows 'Filters' with the following selections:

- Type: Courses, Programs
- Status: Draft, Approved, Review, Rejected

5.0 Modify an Existing Program

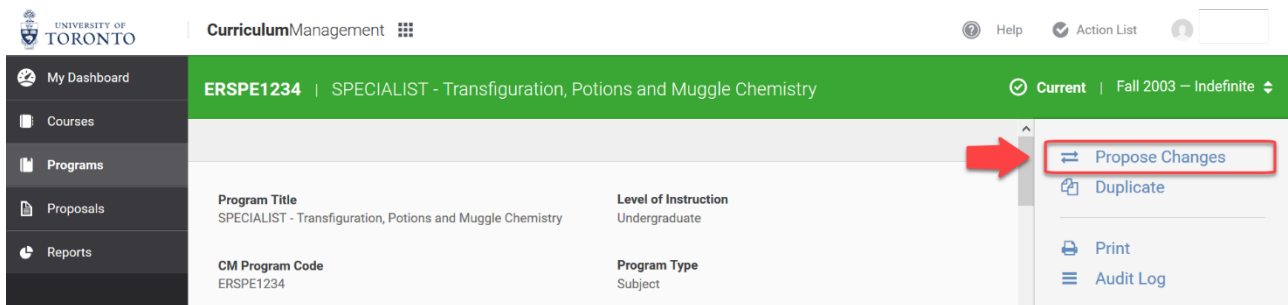
1. Search for the Existing Program and click on the row to open the item.



The screenshot shows the CurriculumManagement interface with a search bar containing 'chem'. A table lists search results with columns for Code, Title, Description, Created On, and Status. The first row, 'ERSPE1234 SPECIALIST - Transfiguration, Potions and Muggle Chemistry', is highlighted with a red box. The interface also includes a sidebar with navigation options like 'My Dashboard', 'Courses', 'Programs', 'Proposals', and 'Reports', and a right-hand panel with 'Search Options' and 'Pagination'.

Code	Title	Description	Created On	Status
ERSPE1234	SPECIALIST - Transfiguration, Potions and Muggle Chemistry	--	17.04.2020	Active
ERMAJ1376	MAJOR - CHEMISTRY	--	24.02.2020	Active
ERMIN1376	MINOR - CHEMISTRY	--	24.02.2020	Active

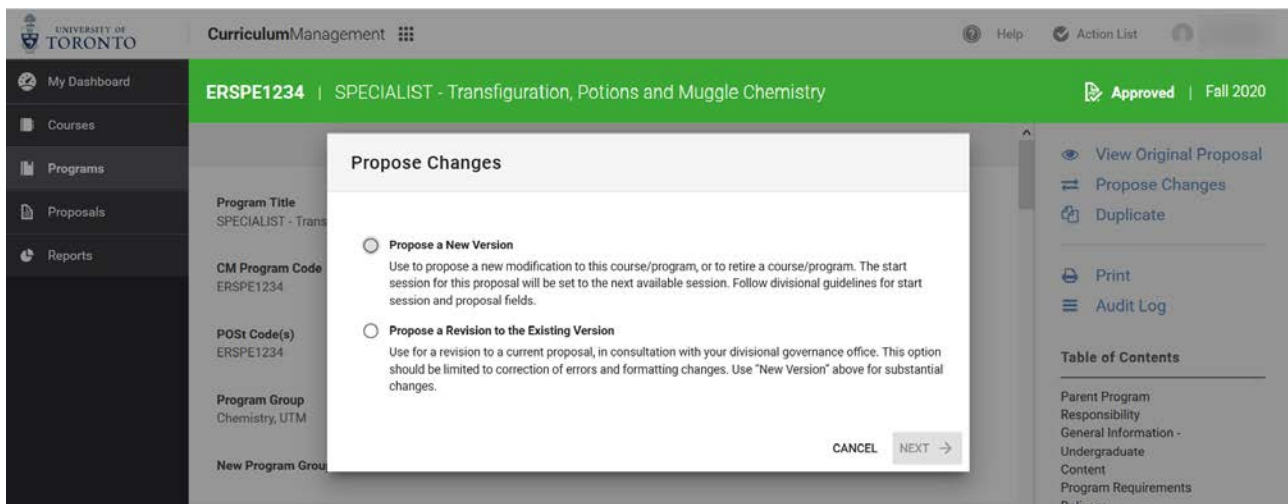
2. Click **Propose Changes**.



The screenshot shows the details page for program 'ERSPE1234 | SPECIALIST - Transfiguration, Potions and Muggle Chemistry'. The page is currently set to 'Current' for 'Fall 2003 - Indefinite'. A red arrow points to the 'Propose Changes' button in the right-hand sidebar, which also includes 'Duplicate', 'Print', and 'Audit Log' options. The main content area displays program details such as 'Program Title', 'Level of Instruction' (Undergraduate), 'CM Program Code' (ERSPE1234), and 'Program Type' (Subject).

3. The following pop up box will appear:

- Select **Propose a New Version** if you are proposing a curricular change.
- Select **Propose a Revision to the Existing Version** if you are proposing an editorial change.




The screenshot shows the 'Propose Changes' modal box overlaid on the program details page. The modal has two radio button options: 'Propose a New Version' and 'Propose a Revision to the Existing Version'. The 'Propose a New Version' option is selected. The modal includes explanatory text for each option and 'CANCEL' and 'NEXT ->' buttons at the bottom. The background page shows the program details for 'ERSPE1234 | SPECIALIST - Transfiguration, Potions and Muggle Chemistry' with a status of 'Approved' for 'Fall 2020'.

- The program form is now open for editing. Input your proposed changes following departmental and divisional guidelines.

When proposing changes to a program, best practice is to review and update ALL program information to ensure the record for the course is accurate and up-to-date.

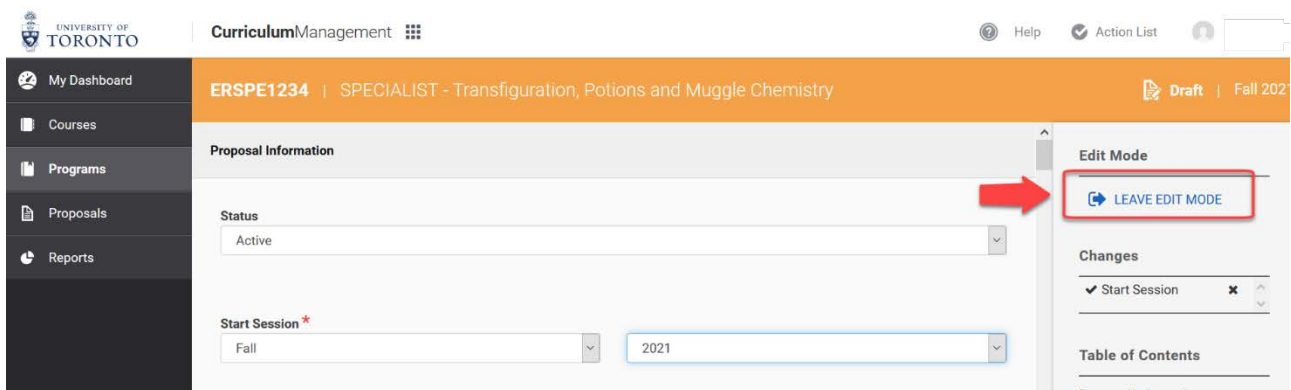
Note: Refer to Appendix A and Appendix B for an overview of the form fields and instructions on what is required at the divisional level. Departments may have additional guidelines that apply.

Tips for completing the program form:

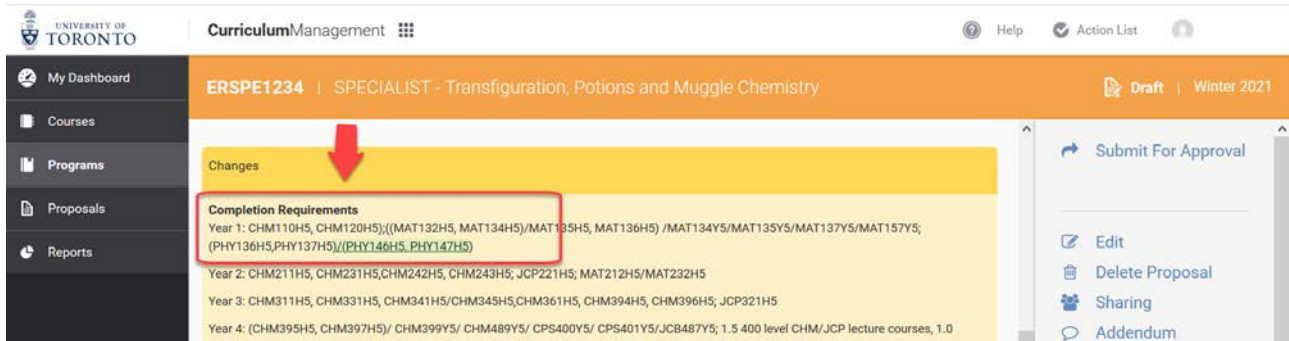
- **Mandatory fields** are indicated with a red asterisk*.
- **Help Bubbles**  featured throughout the form provide additional information and instruction to assist with completing the form.
- **The user must ensure all of the information entered into the form is correct.** CM will not generate an error message for fields that are not mandatory when the user saves the proposal or submits it for approval.
- **Changes are saved in CM as the user enters data.** There is no 'Save' or 'Submit' button to save changes.

- To exit the proposal, click **Leave Edit Mode**, shown on the top of the right hand panel.

Once the user leaves edit mode the proposal is added to the list of draft proposals.

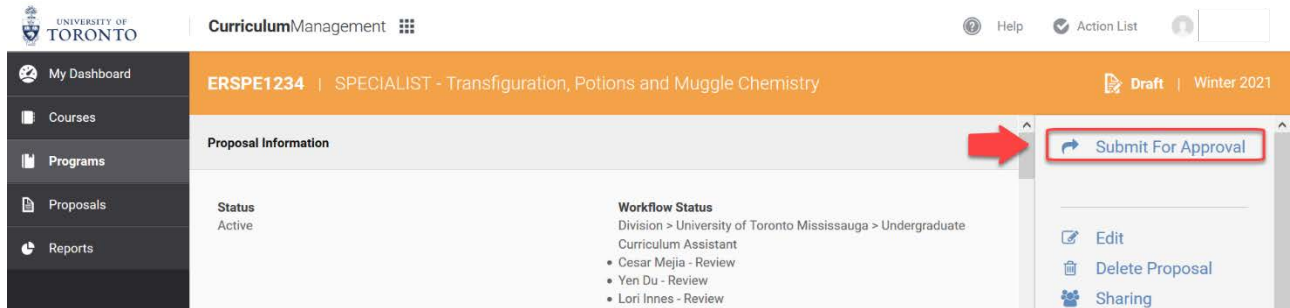


6. Review your changes (highlighted in yellow).



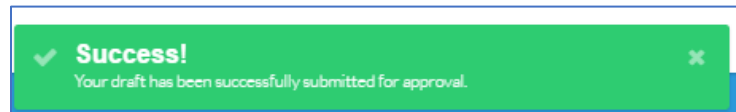
The screenshot shows the CurriculumManagement interface for a program proposal. The 'Changes' section is highlighted in yellow. A red arrow points to the 'Completion Requirements' section, which lists course requirements for Years 1, 2, 3, and 4. The 'Submit For Approval' button is visible on the right-hand menu.

7. If you are ready to submit the program proposal, click **Submit for Approval**.



The screenshot shows the 'Proposal Information' section of the CurriculumManagement interface. A red arrow points to the 'Submit For Approval' button, which is highlighted with a red box. The 'Status' is 'Active' and the 'Workflow Status' is 'Division > University of Toronto Mississauga > Undergraduate Curriculum Assistant'. The 'Submit For Approval' button is located on the right-hand menu.

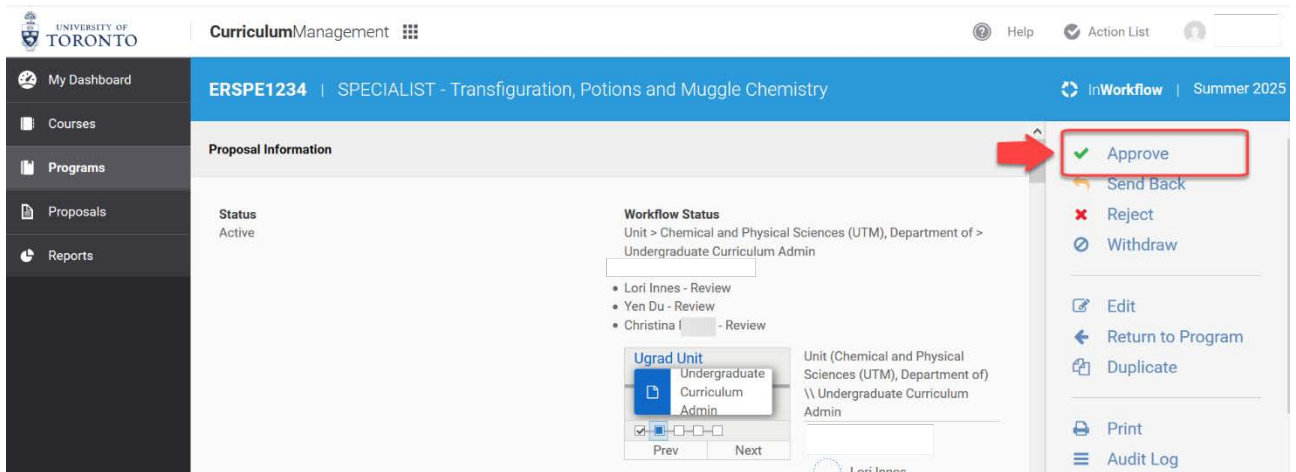
If **Submit for Approval** is selected and the proposal is completed correctly, the **Success message** should be displayed as follows:



8. For the proposal to enter into the governance review process (aka. The **Workflow**), the Unit must **Approve** the proposal as a first step before the Division.

The proposal will go through several stages of approval depending on the type of governance required for the particular change being made. The process to go through approval and workflow is covered later in this document in **Section 7.0**.

If an error was made and you would like to withdraw the proposed changes, click **Withdraw** from the menu on the right hand menu.



UNIVERSITY OF TORONTO CurriculumManagement Help Action List

My Dashboard | ERSPE1234 | SPECIALIST - Transfiguration, Potions and Muggle Chemistry | InWorkflow | Summer 2025

Proposal Information

Status: Active

Workflow Status
Unit > Chemical and Physical Sciences (UTM), Department of > Undergraduate Curriculum Admin

- Lori Innes - Review
- Yen Du - Review
- Christina I - Review

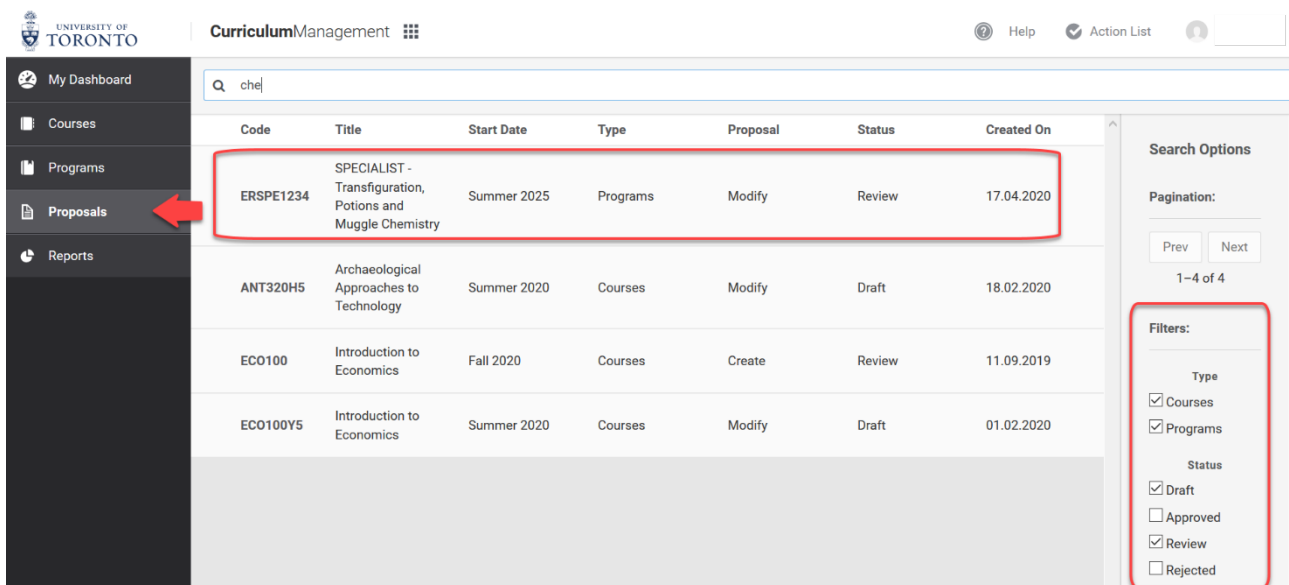
Ugrad Unit
Undergraduate Curriculum Admin

Unit (Chemical and Physical Sciences (UTM), Department of) \\ Undergraduate Curriculum Admin

Buttons: Approve, Send Back, Reject, Withdraw, Edit, Return to Program, Duplicate, Print, Audit Log

9. To view the status of your program change proposal, while it is in the workflow (ie. in the governance review process), search for it under **Proposals**.

Note: Filters on the right hand menu need to be selected to display the program under review.



UNIVERSITY OF TORONTO CurriculumManagement Help Action List

My Dashboard | Search: che |

Code	Title	Start Date	Type	Proposal	Status	Created On
ERSPE1234	SPECIALIST - Transfiguration, Potions and Muggle Chemistry	Summer 2025	Programs	Modify	Review	17.04.2020
ANT320H5	Archaeological Approaches to Technology	Summer 2020	Courses	Modify	Draft	18.02.2020
ECO100	Introduction to Economics	Fall 2020	Courses	Create	Review	11.09.2019
ECO100Y5	Introduction to Economics	Summer 2020	Courses	Modify	Draft	01.02.2020

Search Options

Pagination: 1-4 of 4

Filters:

Type

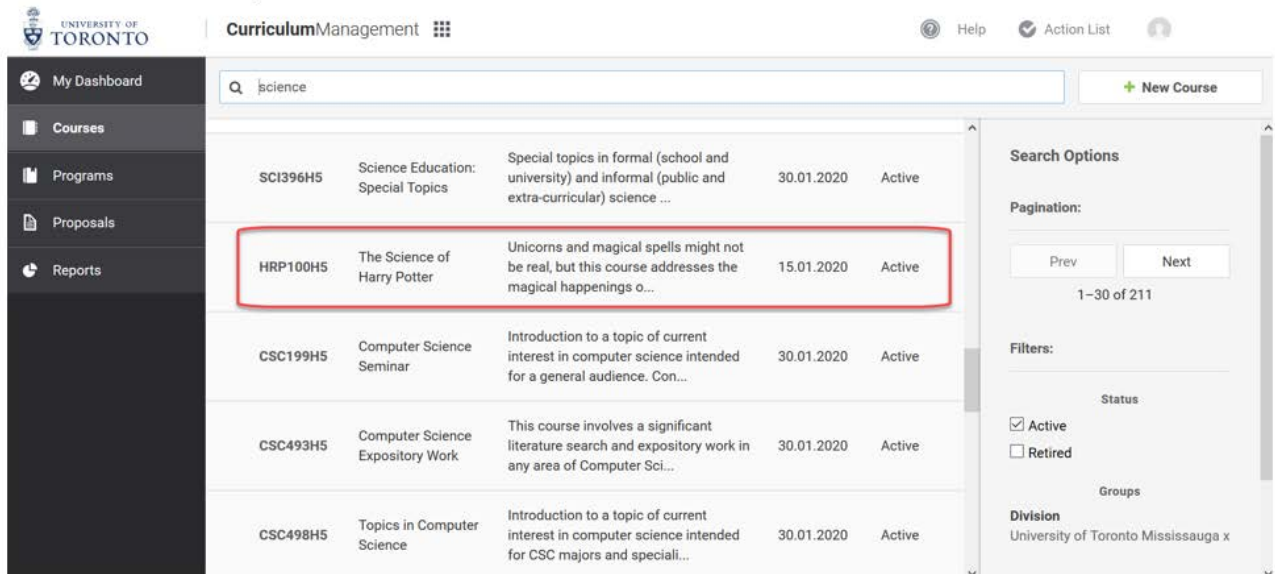
- Courses
- Programs

Status

- Draft
- Approved
- Review
- Rejected

6.0 Retire a Course

1. Search for the Existing Course and click on the row to open the item.



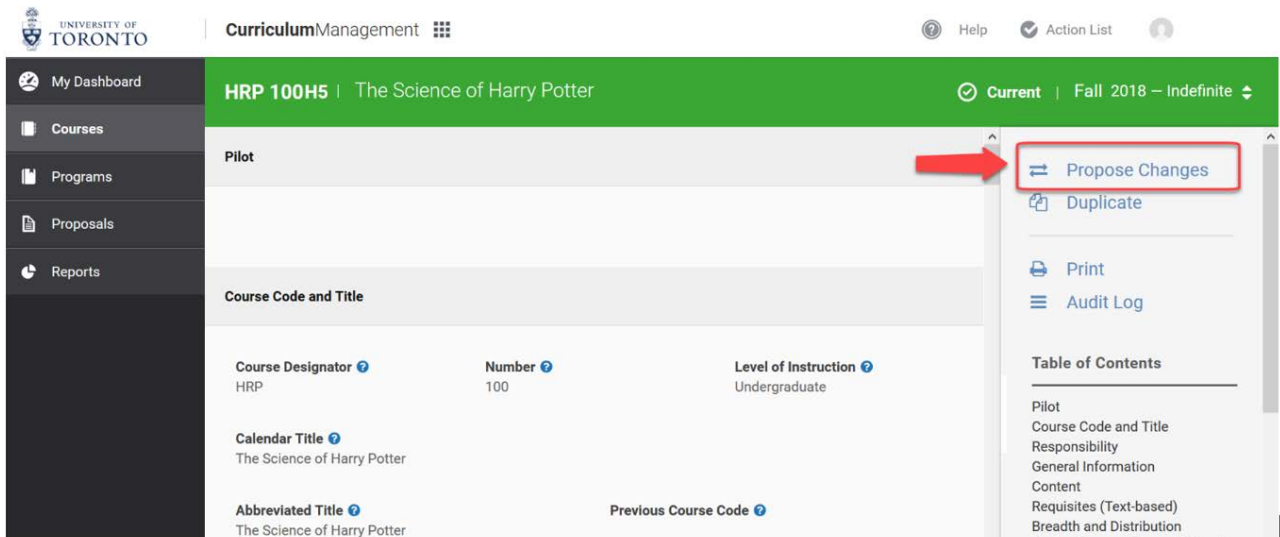
The screenshot shows the CurriculumManagement interface with a search for 'science'. The search results table is as follows:

Course Code	Course Title	Description	Start Date	Status
SCI396H5	Science Education: Special Topics	Special topics in formal (school and university) and informal (public and extra-curricular) science ...	30.01.2020	Active
HRP100H5	The Science of Harry Potter	Unicorns and magical spells might not be real, but this course addresses the magical happenings o...	15.01.2020	Active
CSC199H5	Computer Science Seminar	Introduction to a topic of current interest in computer science intended for a general audience. Con...	30.01.2020	Active
CSC493H5	Computer Science Expository Work	This course involves a significant literature search and expository work in any area of Computer Sci...	30.01.2020	Active
CSC498H5	Topics in Computer Science	Introduction to a topic of current interest in computer science intended for CSC majors and speciali...	30.01.2020	Active

Search Options:

- Search: science
- Buttons: Prev, Next
- Page: 1-30 of 211
- Filters:
 - Status: Active, Retired
 - Groups: University of Toronto Mississauga x

2. Click **Propose Changes**.



The screenshot shows the details for course HRP 100H5, 'The Science of Harry Potter'. The course is currently 'Current' and scheduled for 'Fall 2018 - Indefinite'. The 'Pilot' status is visible. A red arrow points to the 'Propose Changes' button in the right-hand sidebar.

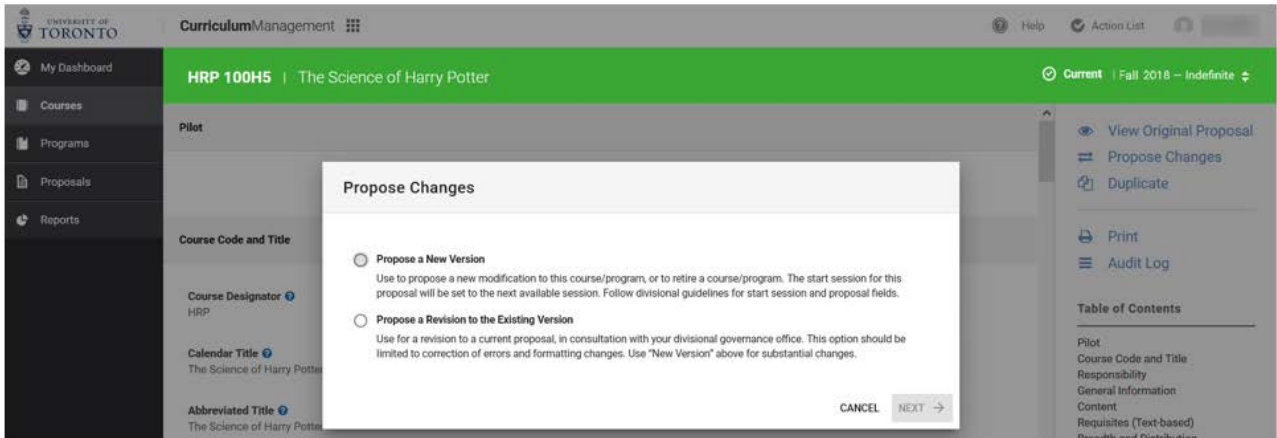
Course Details:

- Course Code and Title:** HRP 100H5 | The Science of Harry Potter
- Course Designator:** HRP
- Number:** 100
- Level of Instruction:** Undergraduate
- Calendar Title:** The Science of Harry Potter
- Abbreviated Title:** The Science of Harry Potter
- Previous Course Code:** (None listed)

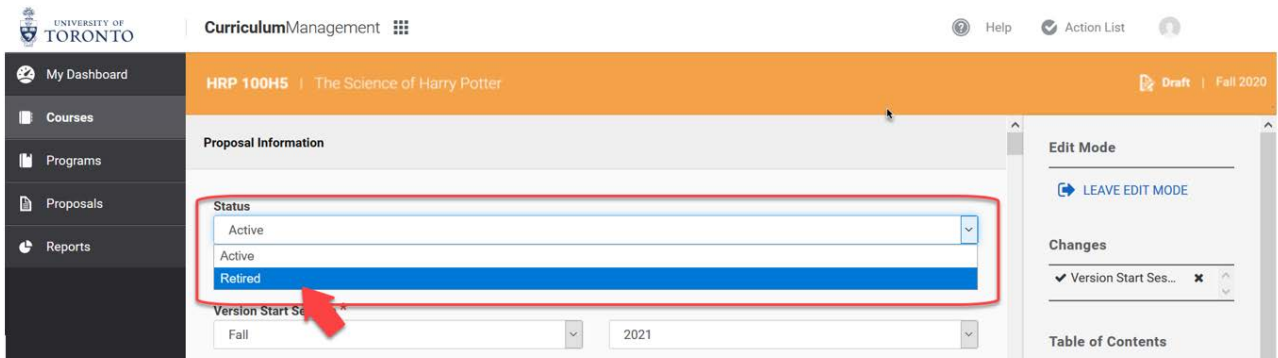
Right-hand sidebar actions:

- Propose Changes** (highlighted with a red box and arrow)
- Duplicate
- Print
- Audit Log
- Table of Contents: Pilot, Course Code and Title, Responsibility, General Information, Content, Requisites (Text-based), Breadth and Distribution

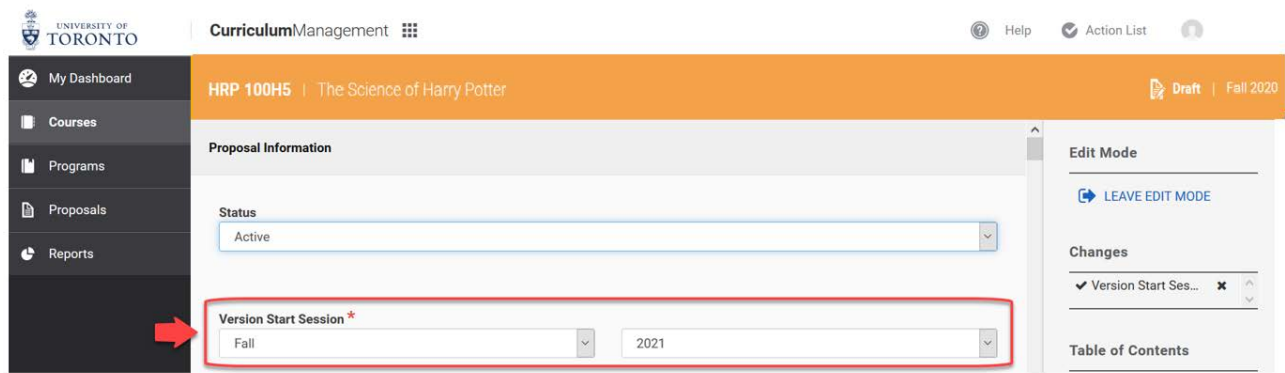
- The following pop up box will appear:
 - Select **Propose a New Version**.



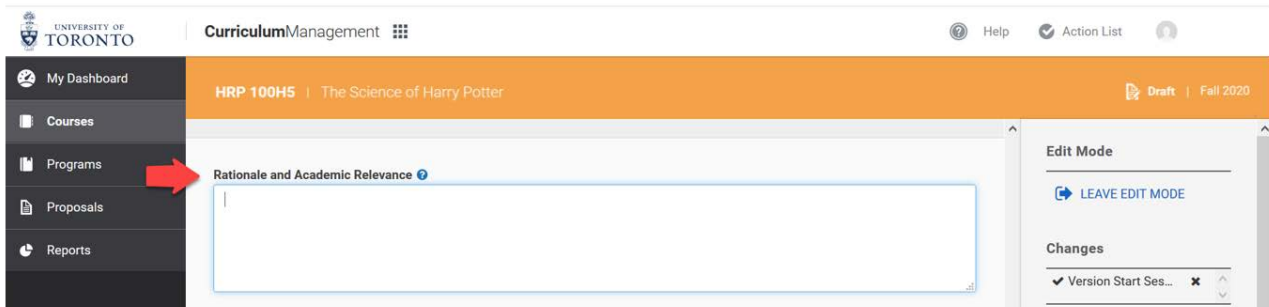
- Change Status to **Retired**:



- Change the **Version Start Date** to the Term and Year when the course retirement will take effect:

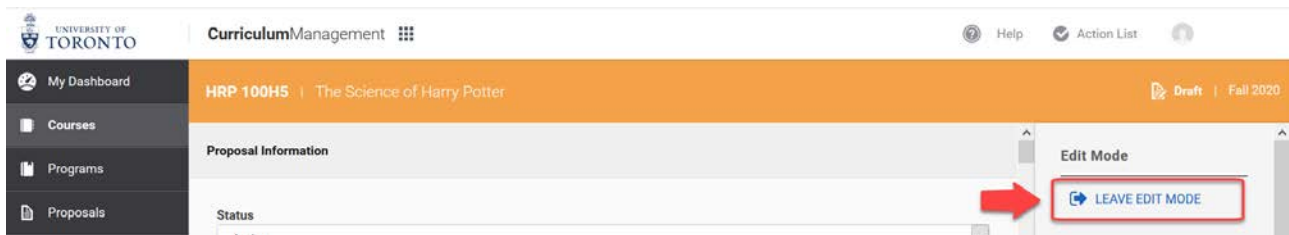


6. Provide the **Rationale and Academic Relevance** for the course retirement:

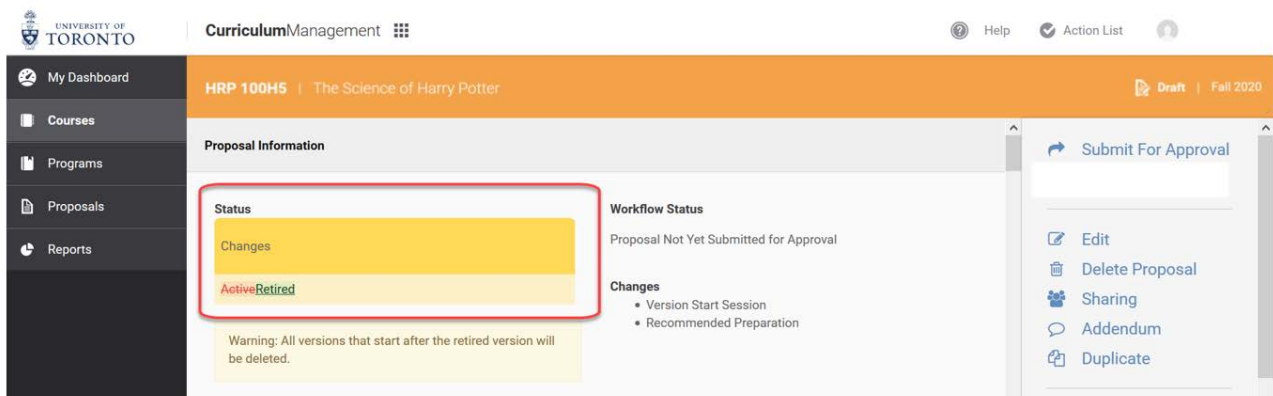


7. To exit the proposal, click **Leave Edit Mode**, shown on the top of the right hand menu.

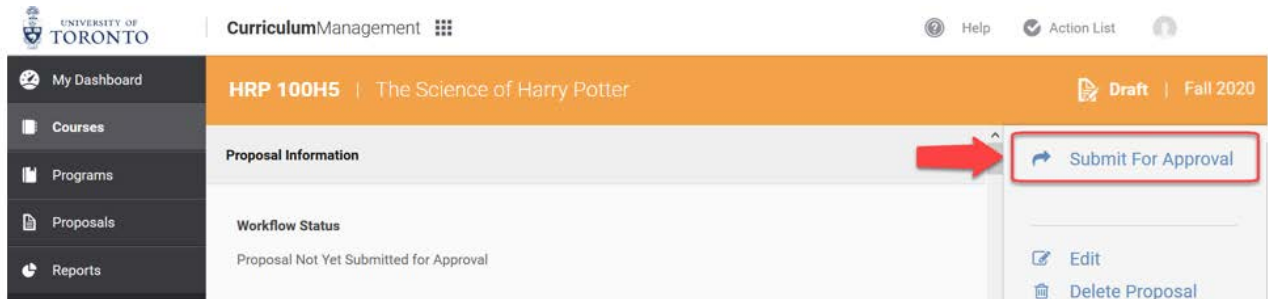
Once the user leaves edit mode the proposal is added to the list of draft proposals.



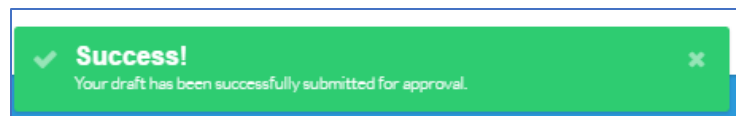
8. Review your change (highlighted in yellow).



9. If you are ready to submit the course proposal, click **Submit for Approval**.



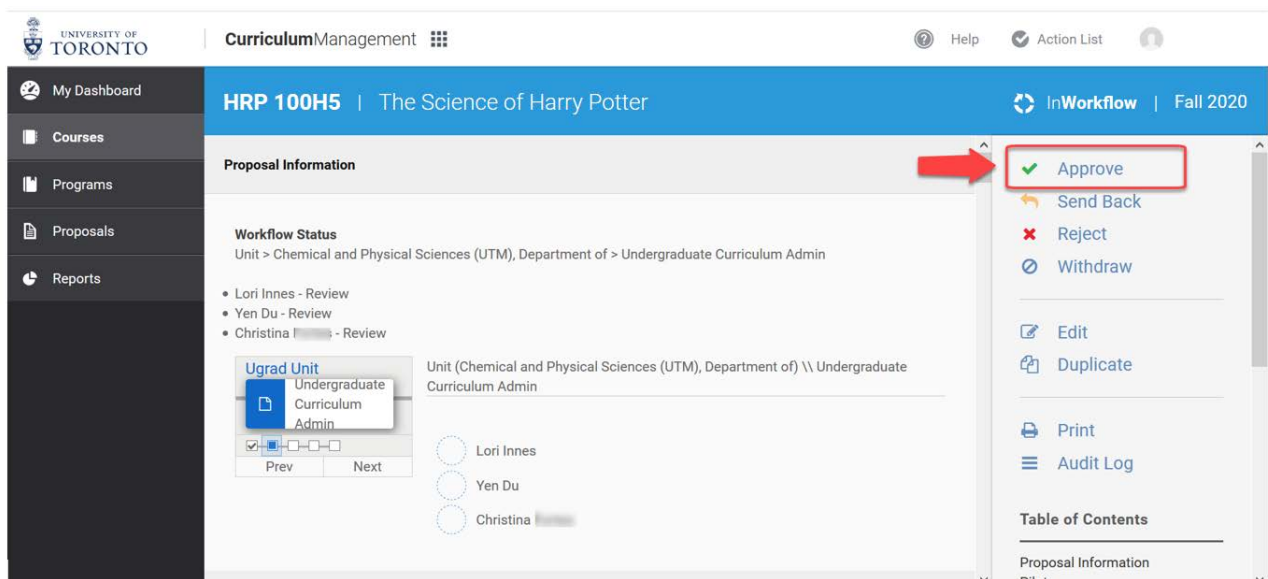
If **Submit for Approval** is selected and the proposal is completed correctly, the **Success message** should be displayed as follows:



10. For the proposal to enter into the governance review process (aka. The **Workflow**), the Unit must **Approve** the proposal as a first step before the Division.

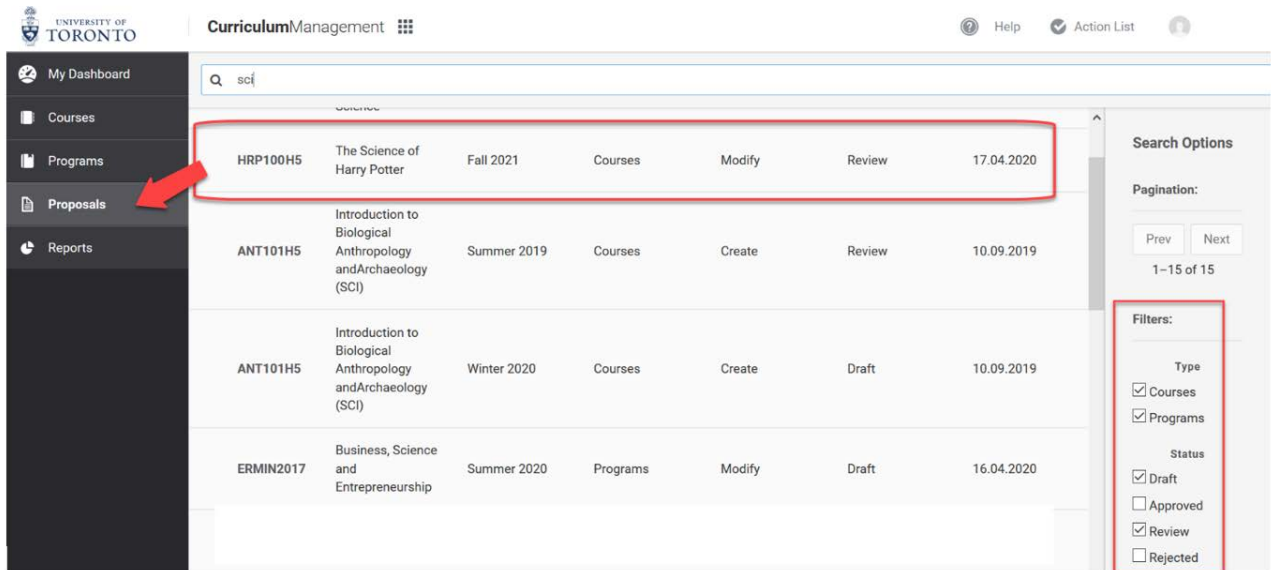
The proposal will go through several stages of approval depending on the type of governance required for the particular change being made. The process to go through approval and workflow is covered later in this document in **Section 7.0**.

If an error was made and you would like to withdraw the proposed changes, click **Withdraw** from the menu on the right hand menu.



11. To view the status of your course change proposal, while it is in the workflow (ie. in the governance review process), search for it under **Proposals**.

Note: Filters on the right hand menu need to be selected to display the course under review.



The screenshot shows the CurriculumManagement interface with a search bar containing 'sci'. The main content area displays a table of proposals. The first row is highlighted with a red box. A red arrow points to the 'Proposals' menu item in the left sidebar. On the right, the 'Filters' section is highlighted with a red box, showing checkboxes for 'Courses', 'Programs', 'Draft', 'Review', and 'Rejected'.

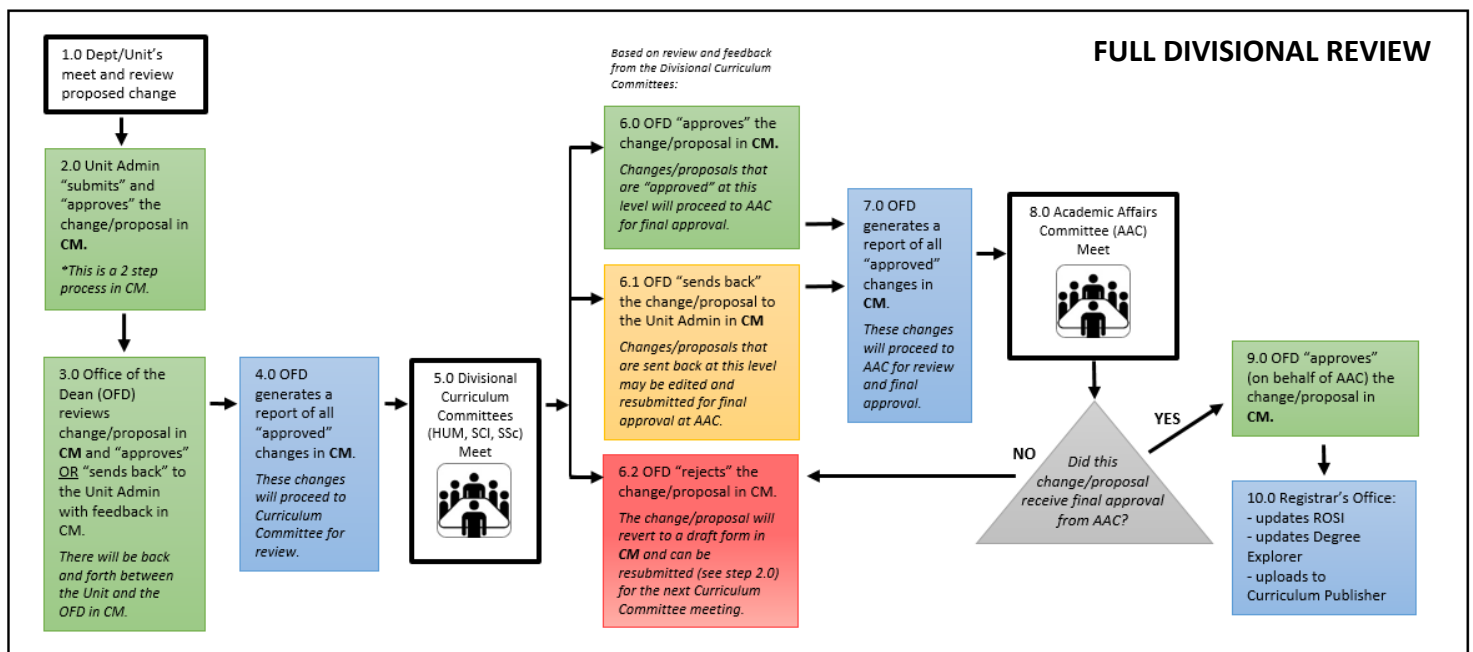
ID	Course Name	Term	Type	Action	Status	Date
HRP100HS	The Science of Harry Potter	Fall 2021	Courses	Modify	Review	17.04.2020
ANT101HS	Introduction to Biological Anthropology and Archaeology (SCI)	Summer 2019	Courses	Create	Review	10.09.2019
ANT101HS	Introduction to Biological Anthropology and Archaeology (SCI)	Winter 2020	Courses	Create	Draft	10.09.2019
ERMIN2017	Business, Science and Entrepreneurship	Summer 2020	Programs	Modify	Draft	16.04.2020

7.0 Navigate the Workflow (Governance Approval Process)

CM includes a workflow tool which can be used to manage the proposal, submission and governance review process.

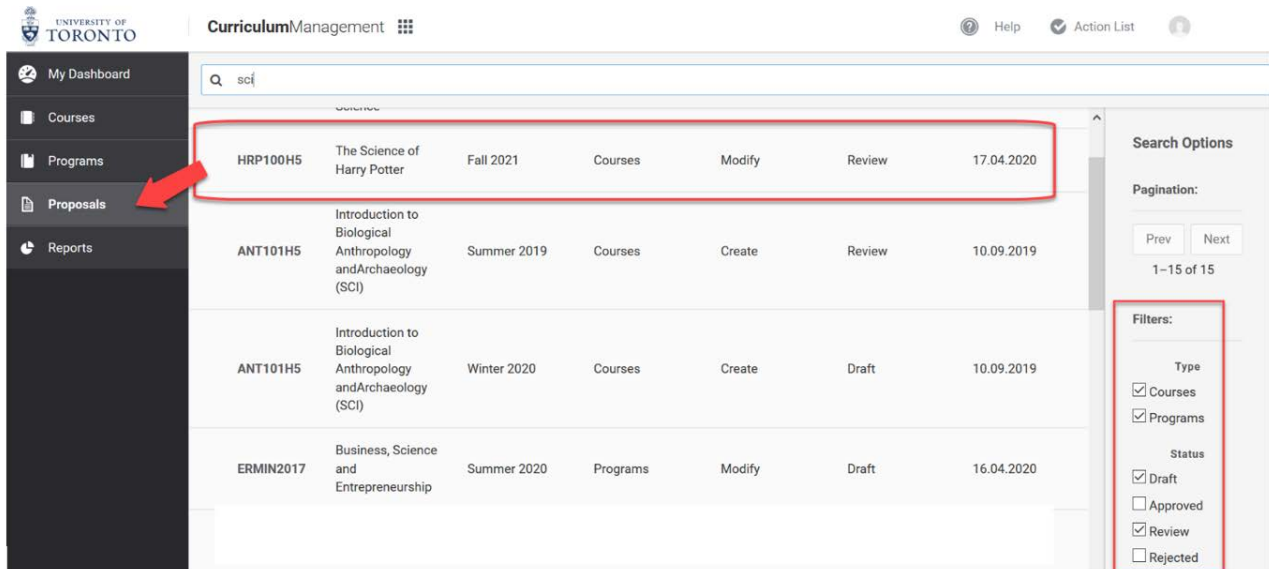
Once a new course proposal, or modification to an existing course or program, has been submitted for approval, the proposal undergoes various stages of approval. Once it's approved at the Academic Affairs Committee, it is finally approved in CM and only then can the change be implemented. *N.B., there is no direct link between CM and ROSI. The Registrar's Office and the Unit will still need to add the course to ROSI.*

The following illustrates the key workflow steps associated with the governance approval processes for UTM.



1. To view the status of your proposal, while it is in the governance review process (aka. the Workflow), search for it under **Proposals**.

Note: Filters on the right hand menu need to be selected to display the course under review.

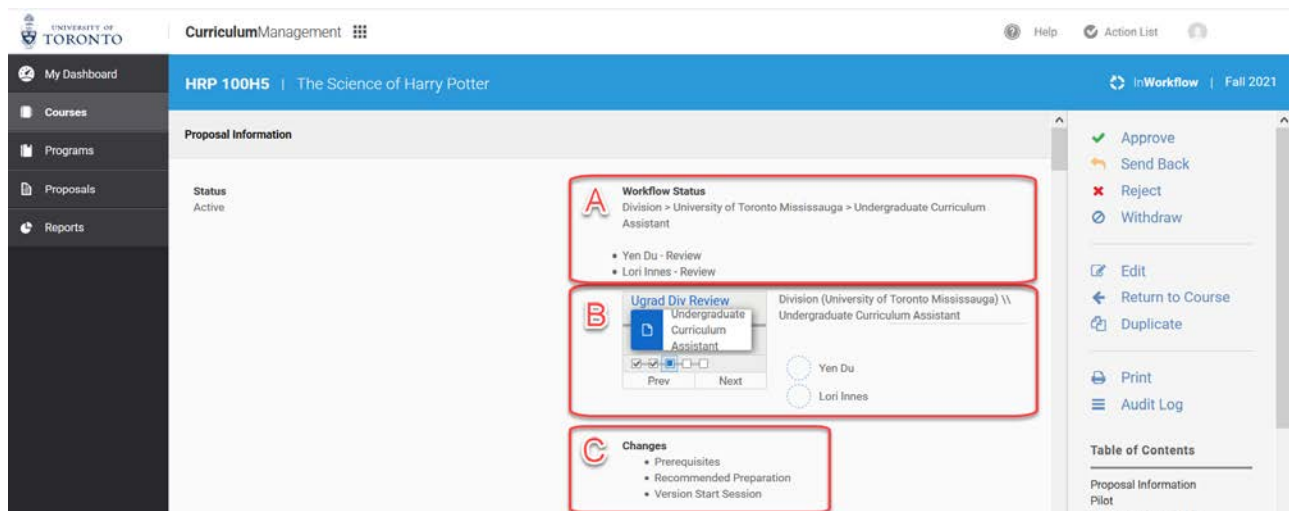


Course Code	Course Title	Session	Type	Action	Status	Last Modified
HRP100H5	The Science of Harry Potter	Fall 2021	Courses	Modify	Review	17.04.2020
ANT101H5	Introduction to Biological Anthropology and Archaeology (SCI)	Summer 2019	Courses	Create	Review	10.09.2019
ANT101H5	Introduction to Biological Anthropology and Archaeology (SCI)	Winter 2020	Courses	Create	Draft	10.09.2019
ERMIN2017	Business, Science and Entrepreneurship	Summer 2020	Programs	Modify	Draft	16.04.2020

2. Open the proposal.

The header for the proposal is **blue** to signify that the proposal is under review. Information about the current status of the proposal is displayed including:

- A. the users responsible for approving the proposal;
- B. a diagram of the stage in the workflow or approval process; and
- C. a summary of the changes made.



HRP 100H5 | The Science of Harry Potter InWorkflow | Fall 2021

Proposal Information

Status: Active

A Workflow Status

Division > University of Toronto Mississauga > Undergraduate Curriculum Assistant

- Yen Du - Review
- Lori Innes - Review

B Ugrad Div Review

Division (University of Toronto Mississauga) \\
Undergraduate Curriculum Assistant

Yen Du
Lori Innes

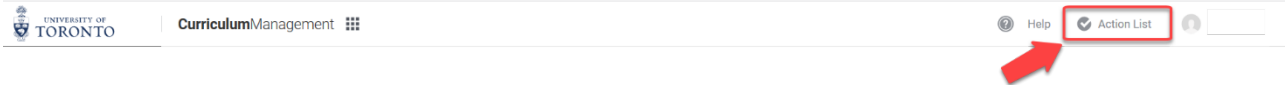
C Changes

- Prerequisites
- Recommended Preparation
- Version Start Session

Approve
 Send Back
 Reject
 Withdraw
 Edit
 Return to Course
 Duplicate
 Print
 Audit Log
Table of Contents
 Proposal Information
 Pilot
 Course Code and Title

3. Users are notified by email and the proposal will appear in the users **Action List** when they are next in the workflow (ie. action is required). The process continues until the final step/approver is reached in the approval process at which time the proposal goes back to the original proposer to show final approval has been obtained.

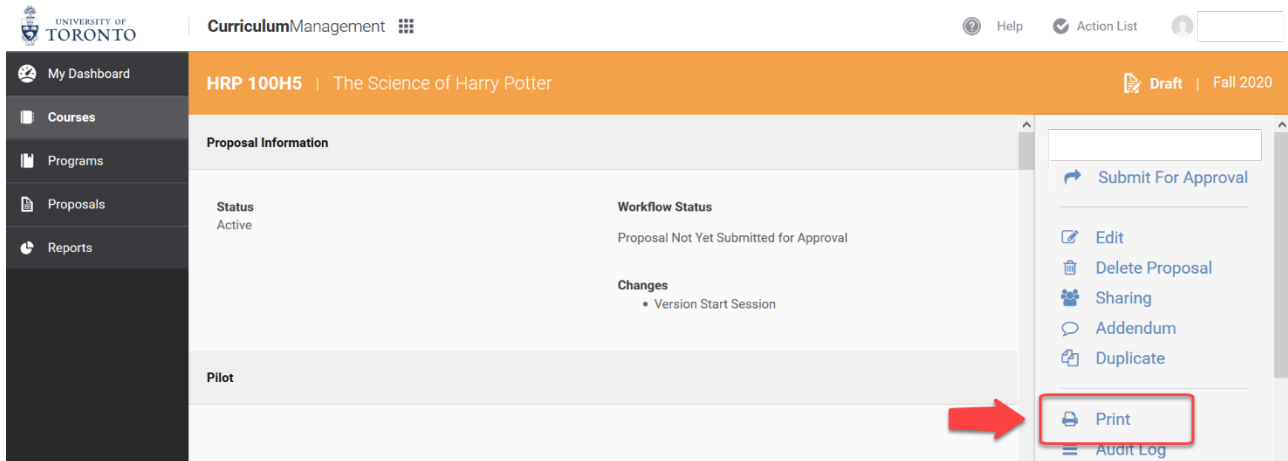
The Action List is located on the top panel of CM the user the list of outstanding actions required.



8.0 Print & Generate Reports

There are several printing options available in CM, depending on the form and function required. Printing can be performed to a printer or to a CSV file or to a PDF document.

1. To print a new proposal or a change proposal, use the **Print** function on the right hand menu:



The screenshot shows the CurriculumManagement interface for a proposal titled 'HRP 100H5 | The Science of Harry Potter'. The proposal is in 'Draft' status for 'Fall 2020'. The right-hand menu is open, and the 'Print' option is highlighted with a red box and a red arrow pointing to it. Other menu options include 'Submit For Approval', 'Edit', 'Delete Proposal', 'Sharing', 'Addendum', 'Duplicate', and 'Audit Log'.

Print view:

HRP 100H5
The Science of Harry Potter
Draft | Fall 2020

Proposal Information

Status Active	Workflow Status Proposal Not Yet Submitted for Approval
	Changes • Version Start Session

Pilot

Course Code and Title

Course Designator ⓘ HRP	Number ⓘ 100H5	Level of Instruction ⓘ Undergraduate
Calendar Title ⓘ The Science of Harry Potter		
Abbreviated Title ⓘ The Science of Harry Potter		Previous Course Code ⓘ
		Previous Course Code Exclusion

Responsibility

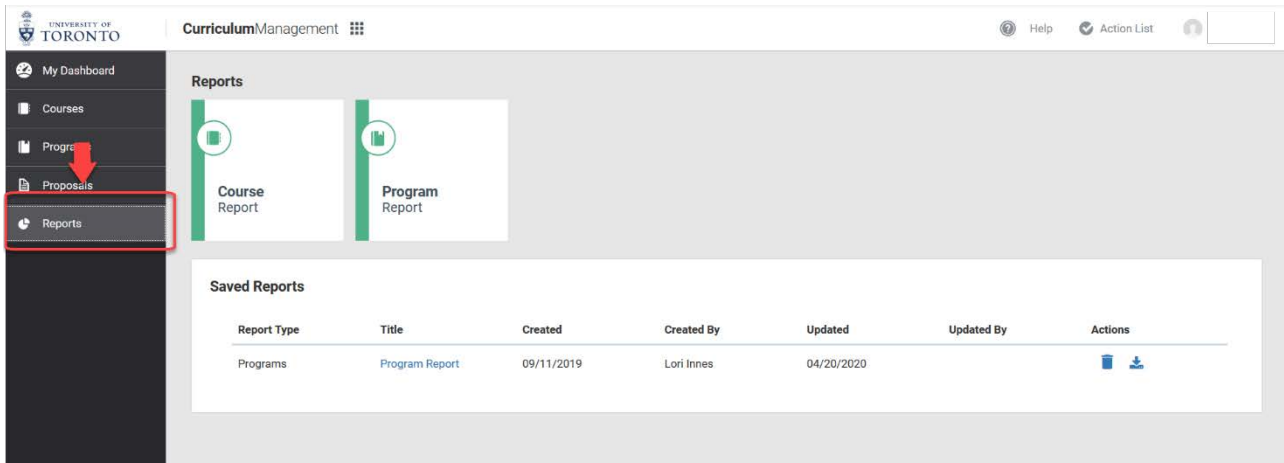
Division ⓘ University of Toronto Mississauga	Associated with (Division) ⓘ
Unit(s) ⓘ Chemical and Physical Sciences (UTM), Department of	Associated with (Unit) ⓘ

General Information



Campus(es) ⓘ Mississauga	Credit Value Fixed
Alias Course Number(s) ⓘ	Fixed Credit Value ⓘ 0.5
Jointly Offered with Course(s) ⓘ	

2. To Export to CSV:

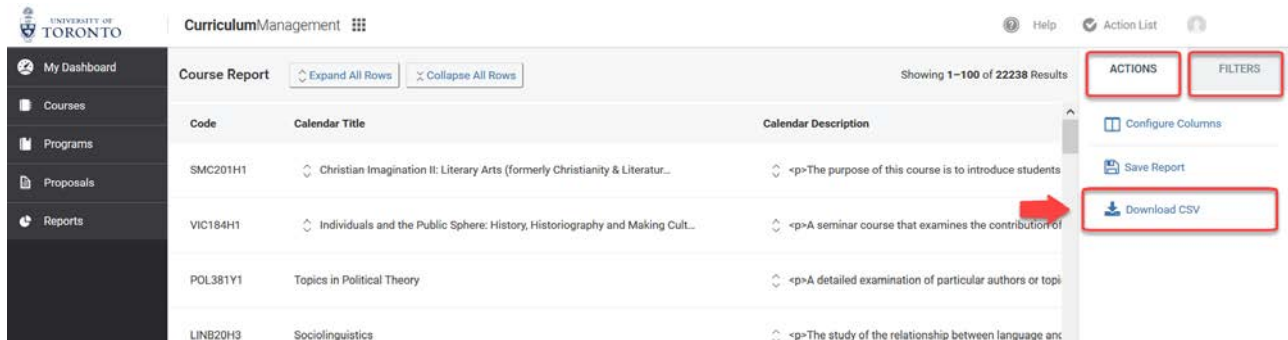
- I. Go to the **Reports** menu and select Course or Program Report:



The screenshot shows the CurriculumManagement interface. On the left sidebar, the 'Reports' menu item is highlighted with a red box and a red arrow. The main content area displays two report options: 'Course Report' and 'Program Report'. Below these is a 'Saved Reports' table.

Report Type	Title	Created	Created By	Updated	Updated By	Actions
Programs	Program Report	09/11/2019	Lori Innes	04/20/2020		 

- II. Use the **Actions** and **Filter** options to configure course and program reports:



The screenshot shows the 'Course Report' page in CurriculumManagement. The 'ACTIONS' and 'FILTERS' buttons are highlighted with red boxes. The 'Download CSV' option is also highlighted with a red box and a red arrow. The table below shows a list of courses.

Code	Calendar Title	Calendar Description
SMC201H1	Christian Imagination II: Literary Arts (formerly Christianity & Literatur...	<p>The purpose of this course is to introduce students
VIC184H1	Individuals and the Public Sphere: History, Historiography and Making Cult...	<p>A seminar course that examines the contribution of
POL381Y1	Topics in Political Theory	<p>A detailed examination of particular authors or topi
LINB20H3	Sociolinguistics	<p>The study of the relationship between language and

APPENDIX A: CM Tip Sheet - Course Fields Explained

Fields highlighted in yellow require careful consideration.

#	Field	Description
1	Version Start Session	Select the start session and year when the course change or new course would take effect. Do not use the default setting. Note: The earliest you can propose any change is for the Fall of the next calendar year.
2	Pilot	Skip. (This option is not in formal use at UTM.)
3	Course Designator	Three-letter designator (e.g., MAT).
4	Number	The rest of the course code (e.g., 235H5). After the three digits, use H5 for a half course and Y5 for a full course. No number may be used for a new course if it has been used by another course within the last three years.
5	Level of Instruction	Check “Undergraduate” .
6	Calendar Title	The title as it will appear in the Calendar itself – short and descriptive.
7	Abbreviated Title	The short or “form” title that appears on ROSI screens and reports (30 characters max.)
8	Previous Course Code	Skip.
9	Exclude Previous Course Code from Calendar Extract	Skip.
10	Division	Type and then select “University of Toronto Mississauga”
11	Associated with (Division)	Leave blank in most cases.
12	Unit(s)	Select your department/unit. For joint courses, include the other offering unit.
13	Associated with (Unit)	Leave blank in most cases.
14	Campuses	Type “Mississauga” .
15	Alias Course Number(s)	Likely skip. Only use this field if there is another course code for this SAME course (ie. Same LEC, meeting time, room, evaluation) - Example: An Italian Cinema course that is offered as an ITA and CIN course.
16	Jointly Offered with Course(s)	Skip.
17	Credit Value	Leave as “Fixed” .
18	Fixed Credit Value	Indicate 1.0 or 0.5 (full or half-course) as appropriate.

19	Proposal Divisional Review	<p>For New Course: Always requires full divisional review</p> <p>For Modified Course: Requires Full Divisional Review if change is curricular approval (e.g., Changes to course title, course description, contact hours, prerequisites/corequisites/exclusions/recommended preparation, etc.); abbreviated if change is editorial only (ie. revising a course description for clarity, editing for grammar and punctuation, etc.)</p> <p><i>*indicate "full divisional review" if you are not sure.</i></p>
20	Inclusion in Program	Check "This proposal/change triggers modifications in the unit's program(s)" if this new course or course change will require a program change proposal. (Note: When adding or changing courses that impact your programs, you will be required to enter the minor modification to your Programs in CM. CM will not do this automatically for you.)
21	UTM Curriculum Committees	Select all committees that will need to review this new course or course change proposal.
22	Calendar Description	<p>Self-explanatory, but some tips:</p> <ul style="list-style-type: none"> • Use a "telegraphic style" – avoid phrases like "this course will consider", "among the topics to be explored" just add space. Use present tense and try to keep to a 50 word limit. • Do not include names of instructors, enrolment controls, and scheduling information. • Write with the idea it will not change year by year despite minor adjustments in the syllabus.
23	URL	Skip.
24	Prerequisites	Self-explanatory. Leave blank, if no prerequisites.
25	Corequisites	Self-explanatory. Leave blank, if no corequisites.
26	Exclusions	Self-explanatory – but remember, if you are renumbering a course, include the old number of the course here as an exclusion. Leave blank, if no exclusions.
27	Recommended Preparation	Self-explanatory. Leave blank, if no recommended preparation.
28	Enrolment Limits	You can indicate if there is a planned, broad constraint to enrolment (like "must be enrolled in the Psychology Specialist program")
29	Breadth Requirement Division	Skip.
30	Breadth Requirements	Skip.
31	Distribution Requirements	Type and select " Science ", " Social Science " or " Humanities " - a dropdown menu will appear.
32	Engineering Accreditation Units	Skip.
33	Use "K" factor	Skip.
34	Total Calculated Accreditation Units	Skip.
35	Engineering Complementary Studies	Skip.
36	Topics Covered	This is optional information that can be included from the syllabus.
37	Methods of Assessment	This is optional information that can be included from the syllabus.

38	Assessment Scheme	This is optional information that can be included from the syllabus.
39	Total Instructional Hours	Indicate total lecture, practical, tutorial and/or seminar hours for the course. This must accurately reflect how the course is currently being taught.
40	Intended Offering Term	If known or planned, indicate it, as it could help understand timetable impact.
41	Mode of Delivery	Self-explanatory.
42	Offering/Delivery Options	Leave as " Standard " (Default)
43	Language of Instruction	Indicate the actual language of course instruction (not topic of the course)
44	Grading	Leave as "Standard" (Default).
45	Enrolment Options	All courses normally may be taken as Credit/No Credit, so this by default is checked.
46	Repeatable for Credit	Go with default selection.
47	Calendar Exclusion	Do not check.
48	Publication	Type " University of Toronto Mississauga " - a dropdown menu will appear. Select the UTM Calendar.
49	Section(s)	Type and select the subject or program area of the UTM Calendar where the course should appear. This can be more than one section.
50	Sub-Section(s)	Skip.
51	Online Course Evaluations	Leave blank.
52	ACORN Availability	Skip. Do not check this field.
53	Rationale and Academic Relevance	As required on all course proposals, outline as needed.
54	Overlap of course content	Indicate any overlap of this course content with current courses offered by other programs or departments.
55	Consultation Undertaken	Self-explanatory.
56	Resources Required	*If no resources are required: indicate " <i>none</i> ". *If new or additional resources are required as a result of the change: provide a brief explanation of the resourcing required (i.e. TA, Classroom/lab space, Library resources, etc) and note " <i>Resource Implications Form has been submitted</i> ". See field #62 where you will be required to attach a copy of the Resource Implications Form (PDF).
57	Part of a Program Proposal	Skip.
58	Programs of Study for which this course may be suitable	Optional. If there are other programs that may wish to include this course, indicate that here.
59	Estimated Enrolment	Self-explanatory.
60	Instructor	For new courses, you must provide the name of the instructor.
61	Revived Courses	If this is a revived course, indicate the last session this course appeared in the calendar.

62	Additional Proposal Documents	<p>Add files relevant to the proposal.</p> <p>*For new courses: attach the Resource Implications Form for New Courses (PDF) here. This is required for all new courses.</p> <p>*For course modifications: attach the Resource Implications Form for EXISTING Courses (PDF). This is only required if a CHANGE in resourcing is needed as a result of the proposed modification.</p>
63	Additional Course Documents	Skip.

APPENDIX B: CM Tip Sheet - Program Fields Explained

For minor modifications only

Fields highlighted in yellow require careful consideration.

#	Field	Description
1	Status	Leave as active.
2	Start Session	Select the start session and year when the program change(s) would take effect. Do not use the default setting. Note: The earliest you can propose any change is for the Fall of the next calendar year.
3	Program Title	If you are proposing a change to the name of the program, enter the new name here
4	Level of Instruction	Do not change
5	CM Program Code	Leave field empty
6	POSt Codes	Do not change
7	Program Type	Do not change
8	Program Group	Do not change
9	New Programs Group	Leave unchecked
10	Parent Program	Leave field empty – the Dean’s Office will update the field if necessary
11	Division	Do not change
12	Associated with Division	Leave field empty
13	Units	Do not change
14	Associated with Unit	Leave field empty
15	College	Leave field empty
16	Proposal Type	Select Minor Modification – Full Divisional Review; the Dean’s Office will adjust this as necessary
17	Subject Program Level	Do not change
18	Category	Do not change
19	Description	Use this field to give a description of the program; include any information associated with the Program Supervisor, or who students should contact about the program
20	Exclude Description from Calendar	Do not check this box
21	Admission Requirements	For the time being, leave the field empty
22	Enrolment Requirements	Use this field to describe the program’s enrolment requirements – these might include CGPA requirements, or requirements to complete certain courses.
23	Completion Requirements	Use this field to describe the program’s course requirements, and any other requirements for completion; for example, in co-op programs the completion requirements may include work terms

24	Mode of Delivery	This field is currently unchecked; the Dean's Office will update all programs to show the Mode of Delivery as "In Class"
25	Method of Delivery	This field is currently unchecked; do not change
26	Abbreviated Title	Do not change – if the proposal is to change the title of the program, the Dean's Office will complete this field
27	Transcript Title	Do not change – if the proposal is to change the title of the program, the Dean's Office will complete this field
28	Publication	Do not change
29	Sections	Do not change
30	Calendar Exclusions	Leave box unchecked
31	ESIS SPEMAJ	Leave field empty
32	CIP (2010)	Leave field empty
33	ESIS SPEJOI	Leave field empty
34	Accrediting Agency	Leave field empty
35	Brief Description of the Proposed Changes	Identify in point form the changes you are making
36	Rationale	Enter the rationale for the proposed changes
37	Impact	Describe any impact the changes will have on students or on other academic units
38	Consultation	Describe the consultation regarding the changes, including any internal consultation, and all consultation outside of the academic unit proposing the course. INCLUDE THE DATE ON WHICH THE CHANGES WERE APPROVED BY YOUR CURRICULUM COMMITTEE.
39	Resource Implications	Describe any resources implications associated with the proposed changes, and indicate how the unit plans to manage them
40	Additional Proposal Documents	You can, if you wish, attach a document
41	Additional Program Documents	You can, if you wish, attach a document

APPENDIX C: Kualii CM Glossary

Action List - The **Action List** allows any user in the system to view and access proposals that they need to complete an action on.

Addendum - A proposer can request another user in the system to add a comment to their draft proposal. These comments will live on the proposal for the approvers to view as the proposal passes through workflow.

Canonical Information - The information or data in a course or program record which requires review in the governance process (whether abbreviated or full), as opposed to **Proposal information** or **Offering** or **Sessional information**, which may change session over session. Offering information is not included in CM but would be created in ROSI and other student systems.

Course - A course is a unit of teaching that typically lasts one academic term. The course item has its own form configuration, workflow, and search page. This item type can be renamed under University Preferences. Please contact an administrator if you are unsure of how courses are named.

Course Designator - Each institution can create a list of **Course Designator** codes (an identifying code for your courses). This option type can be renamed under University Preferences. Please contact your administrators to learn what it will be named in your system.

Edit Mode - When you are editing a draft or proposal (see proposal definition below) you are in **Edit Mode**. In edit mode you can change any field and each field is saved immediately. You can undo any changes on the right hand menu bar. Each role has different editing rights. Admins, CM admins, proposal owners, and those proposals have been shared with are able to edit the proposal.

Filters - These are used in CM to narrow search results and give the user more control over what appears on the screen.

- Retired refers to courses in CM that have been retired or closed.
- Draft refers to proposals not yet submitted for approval.
- Approved refers to proposals that have already been through the approval process successfully. These should be found as courses in CM.
- Review refers to proposals that are under review, somewhere in the approval process.
- Rejected refers to proposals that have been rejected (see below).
- My Proposals refers to the list of proposals submitted by the current user.

Program - A **Program** is a program of study that usually results in a degree or other award. It normally contains information such as courses to take, rules for admission and graduation, accreditation information, program ownership, and so forth. **Programs** have their own form configuration, workflow and search page. This item type can be renamed under University Preferences. Please contact your administrators to learn what it will be named in your system.

Status - Each version of a document in CM has a **Status**. The status identifies if the course, program, etc. is offered in Enrollment. These statuses depend on the current term that is set up in System Settings.

- i. **Draft** - When you initially create a new document it is considered a draft. Your document will remain a draft until you submit to workflow.
- ii. **Proposal** - When a document has been submitted for approval its status moves from draft to a proposal. Having a status of proposal means the version is in the process of being approved.
- iii. **Active** - Proposals are active once they have completed the approval process and if they are within the current term.
- iv. **Future** - Versions get the Future Status when a proposal is approved with a future start date. When the document becomes current it receives the Active Status.
- v. **Past** - When a document has an end date that is in the past it receives the status of past
- vi. **Retired** - Once a document has been approved, there is no way to delete it. You can retire a document, which keeps it in the system but gives it the status of retired.

Versions - Each document in Quali's Curriculum Management has **Versions** attached to it. Each time a user proposes changes they are asked to define a new start term and it creates a new version. Multiple versions can be offered in Enrollment; returning students and alumni may have an old version of a course on their record while new students are enrolling in new versions of a course.