Kuali Student Course Training

Presented by: Office of the Registrar

Kuali CO Student Vision

The vision of Kuali Student is to be a complete, modern student system that will include the following components. It is not yet determined if CSU-Pueblo will incorporate all modules into its Enrollment Management division.

Curriculum Management   Enrollment

Degree Auditing   Admissions

Financial Aid   Student Accounts

Academic Planning

Basics Training Agenda

- Program Functions

- New Course Proposal

- Review or Submit Proposal Change

- Workflow Approval/Proposal Review

- Proposal Groups

- Reports

- Approval Process

Curriculum Management (CM)

- Courses

- Programs
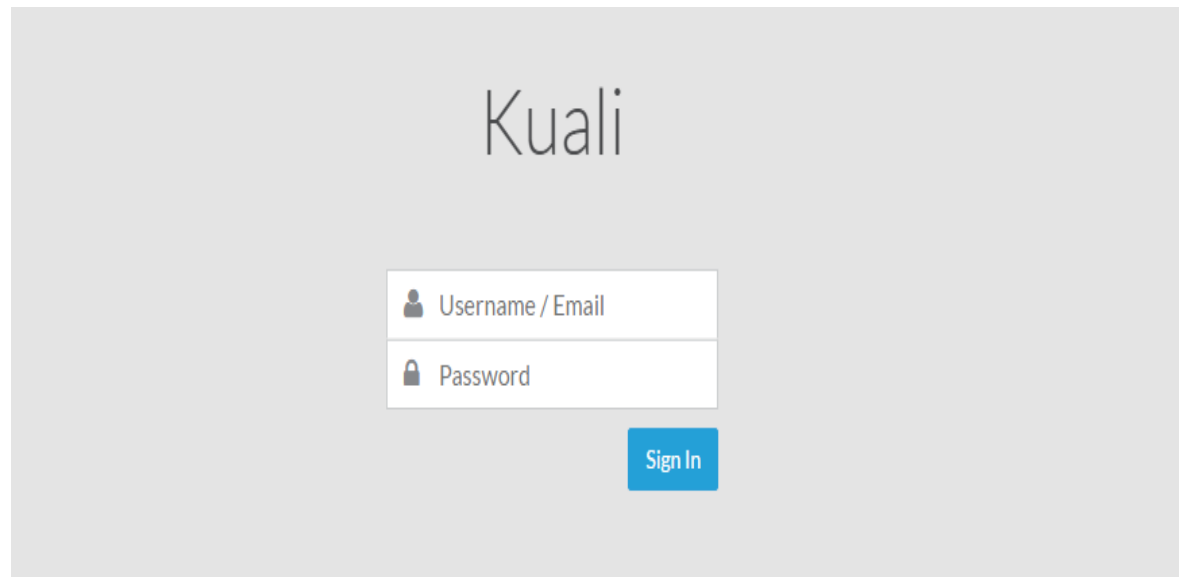
- Catalog

Program Functions

Kuali Student Access

- All users must complete the basic training session to gain access to Kuali Student Production.

- Training session attendance roster will be used to grant initial system access.

- Once access is granted, use the Curriculum Management system to update and make changes to your existing account.

- In the future, contact the Brianna Bueno, Assistant Registrar, to add new users or delete access.

Basic Navigation

- Contact Brianna Bueno regarding navigation questions or to register for future training sessions. (x2900; brianna.bueno@csupueblo.edu)

- To access the Kuali Student training environment, type the following link into your browser.

  https://csupueblo-sbx.kuali.co/apps/

Enter the user name and password assigned by the Office of the Registrar.
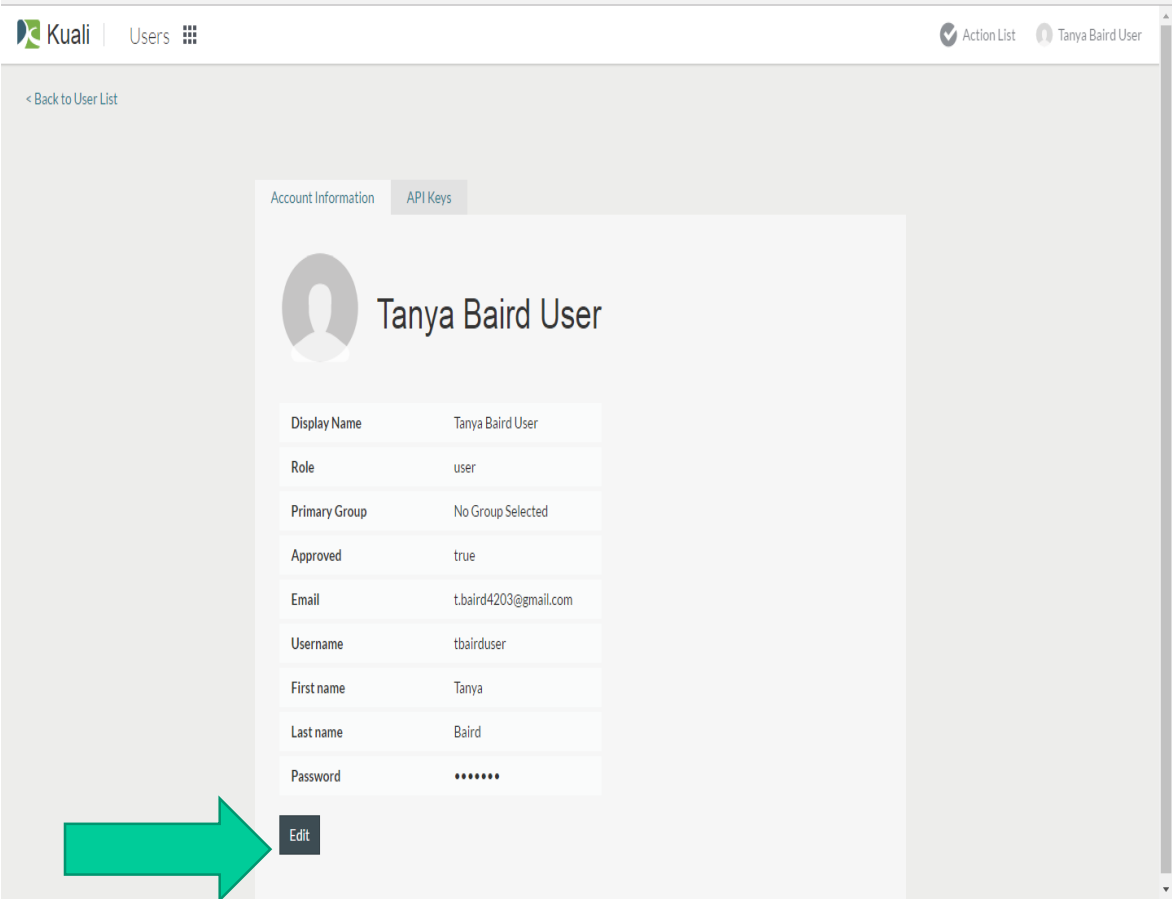
From the login page, user can access the Curriculum and User applications, as well as their Action List and User account.
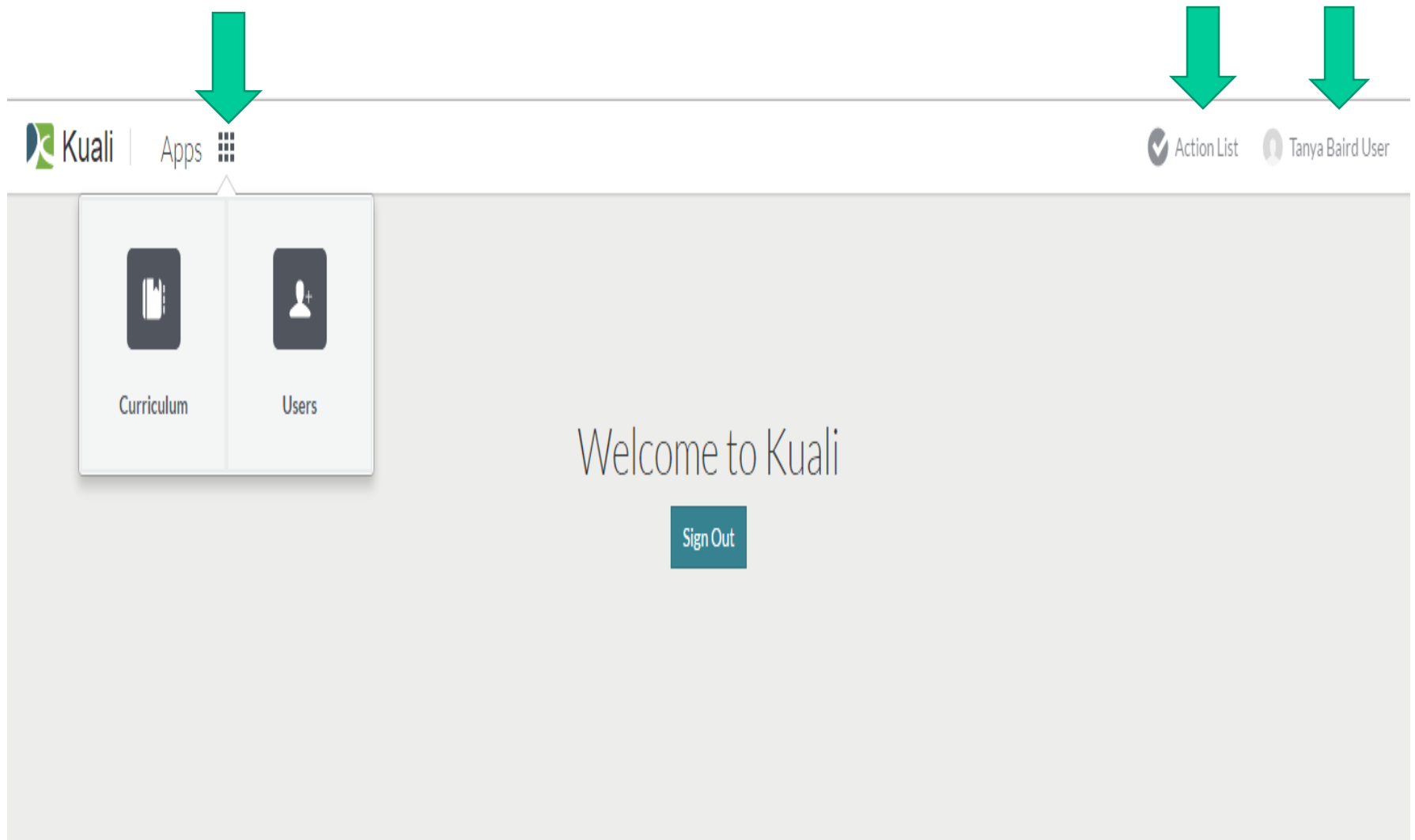
Change User Access Setting

- Use the "Edit" button to make changes to the User profile.
- Once in the system, users are encouraged to change their password from the generic login. *(Passwords are required to be a minimum of 8 characters.)*
- Users must use their CSU-Pueblo email address.
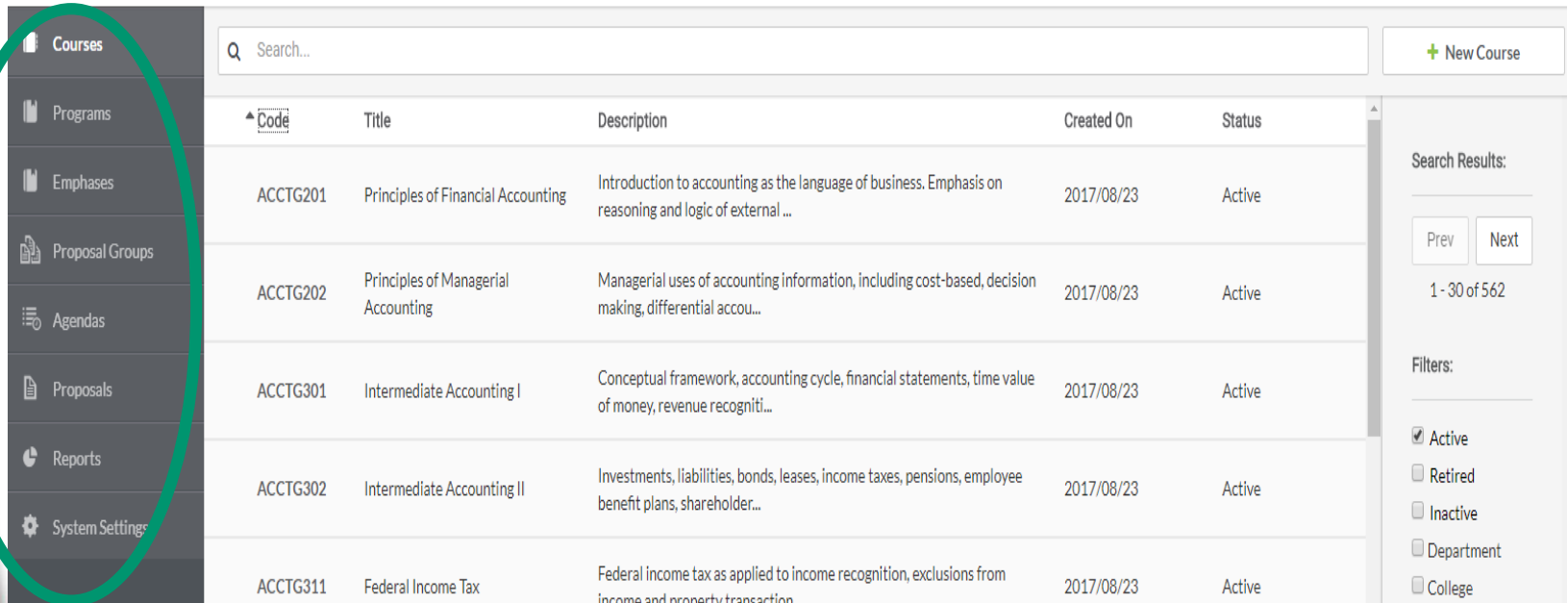
Curriculum Management

The Curriculum application allows users access to active/retired/inactive courses, program information, groups, proposals, agendas and reports. (Active = Current; Retired = Deleted; Inactive = Reserve)

Active Courses Home Page

"Active" status courses

Filtering Options

1. Search type-in field
2. Filter by list columns ("Code" = prefix and course number)
3. Filters
4. Active = Active

   Inactive = Reserve

   Retired = Deleted

New Course Proposal

Starting a new proposal
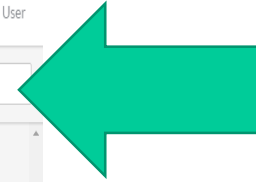
To propose a new course, begin by clicking on the "+ New Course" tab.

New Course Basics

- Many of the fields have drop-down lists to choose from. Users must highlight their choice and press "enter" on the keyboard for selection to stick. Users can also start typing until their selection is filtered out of the list.

- Currently the Curriculum and Programs Board has limited course additions and changes to two years into the future.

- Items with a red asterisk (*) are required fields.

- Some questions are progressive disclosure.

- Help (?) options provide additional information regarding the field or question.

Menu Options

- Edit Mode – at any point in the process a user can leave edit mode and changes are saved.

- Changes – tracks the changes made to the form.

- Table of Contents – allows user to jump from one section of the form to the other.

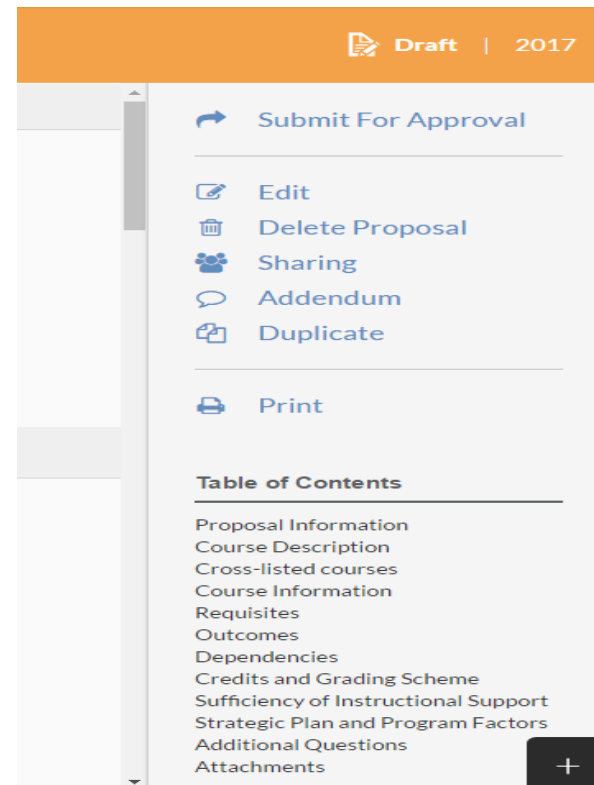- Change Feed – tracks changes made to all courses.

New Course Proposal

(Orange Ribbon)

To start:

- Complete all required fields and those important to the success of the course.

- Choose "Leave Edit Mode" when finished.

Submittal options:

Draft | 2017

→ Submit For Approval

☑ Edit
🗑 Delete Proposal
👥 Sharing
💬 Addendum
🗐 Duplicate

🖨 Print

Table of Contents

Submittal Options

- Submit for Approval – once submitted, only workflow approvers can edit a proposal.

- Edit – correct changes prior to submittal

- Delete Proposal – delete from system completely

- Sharing – share with other system users

- Addendum – attach additional materials not required by CAPB
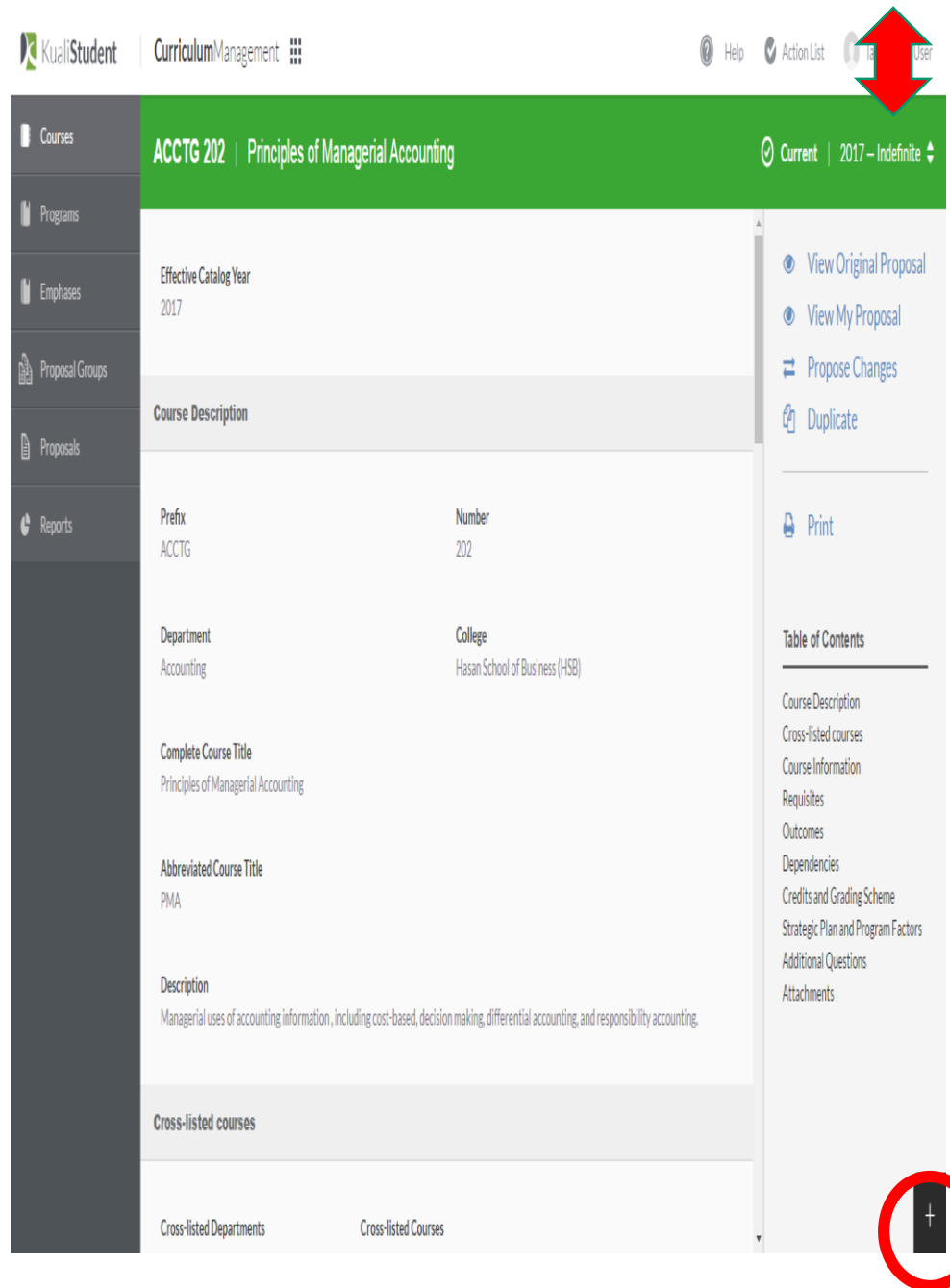
- Duplicate – copy

- Print

Submit

- A notification will appear at top of screen (In Workflow, Successful, Error).

- Orange ribbon turns to blue.

- Option to Withdraw, Duplicate, and Print.

- Workflow status is displayed at top right.

Review a course

- From the Courses home page, choose a course. Ribbon is now green.

- Active information is displayed.

- Life cycle of course is displayed at top right.

- History can be viewed by clicking on the Feed Change **+** at lower right corner of screen.

Propose Course Change

- From the Courses home page, choose a course.

- For a new proposal, select "Propose Changes" from menu. Ribbon changes from green to orange.

- If a proposal is already in process, or saved without being submitted, system will display "View My Proposal." Review what is in process before creating a new proposal.

- If course has been "Retired," the user must "Duplicate" (copy) the record to propose a new change.

Curriculum Management

Help Action List Tanya Baird User

ACCTG 202 | Principles of Managerial Accounting ⊘ Current | 2017 – Indefinite

Effective Catalog Year
2017

Course Description

Prefix
ACCTG

Number
202

Department
Accounting

College
Hasan School of Business (HSB)

Complete Course Title
Principles of Managerial Accounting

Abbreviated Course Title
PMA

Description
Managerial uses of accounting information , including cost-based, decision making, differential accounting, and responsibility accounting.

Cross-listed courses

Cross-listed Departments   Cross-listed Courses

👁 View Original Proposal
👁 View My Proposal
⇄ Propose Changes
🗐 Duplicate

🖶 Print

Table of Contents

Course Description
Cross-listed courses
Course Information
Requisites
Outcomes
Dependencies
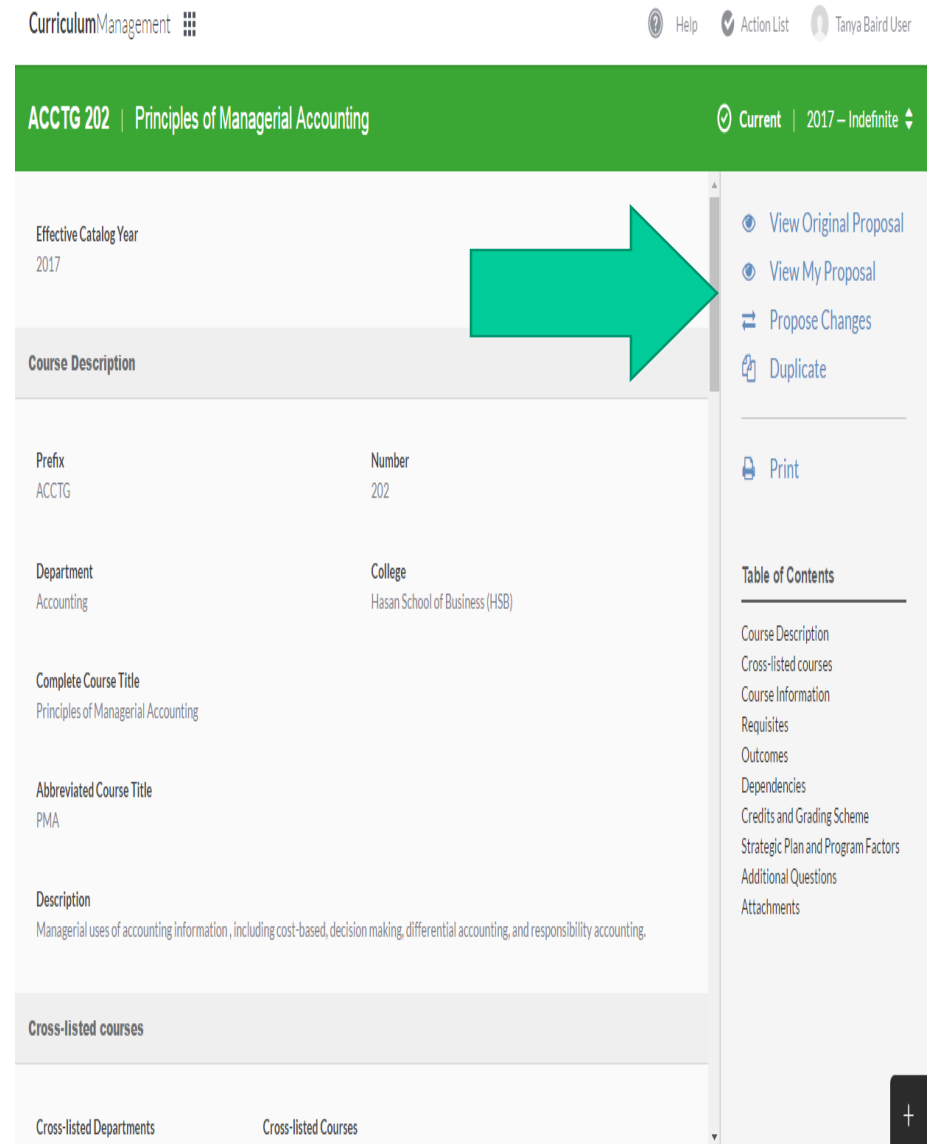Credits and Grading Scheme
Strategic Plan and Program Factors
Additional Questions
Attachments

Change Options

Users can:

- Change an active course,

- Retire an active course, or

- Inactivate a course.

- Currently the Curriculum and Programs Board has limited course additions and changes to two years into the future.

Make changes

- Select "Propose Changes."
- Complete all changes (write over current information).
- Changes are tracked in menu options. User can review or delete changes using this list.
- User can move easily between sections by using the "Table of Contents" menu.
- When complete, select "LEAVE EDIT MODE" from menu.

Submit Changes

- Review changes prior to "Submit for Approval."
- Changes are shown directly above (yellow) existing course information (blue).
- Submit For Approval

Menu Options:

- Submit for Approval - once submitted, only workflow approvers can edit proposal.
- Edit – correct changes prior to submittal
- Delete Proposal – delete from system completely
- Sharing – share with other system users
- Addendum – attach additional materials not required by CAPB
- Duplicate – copy
- Print

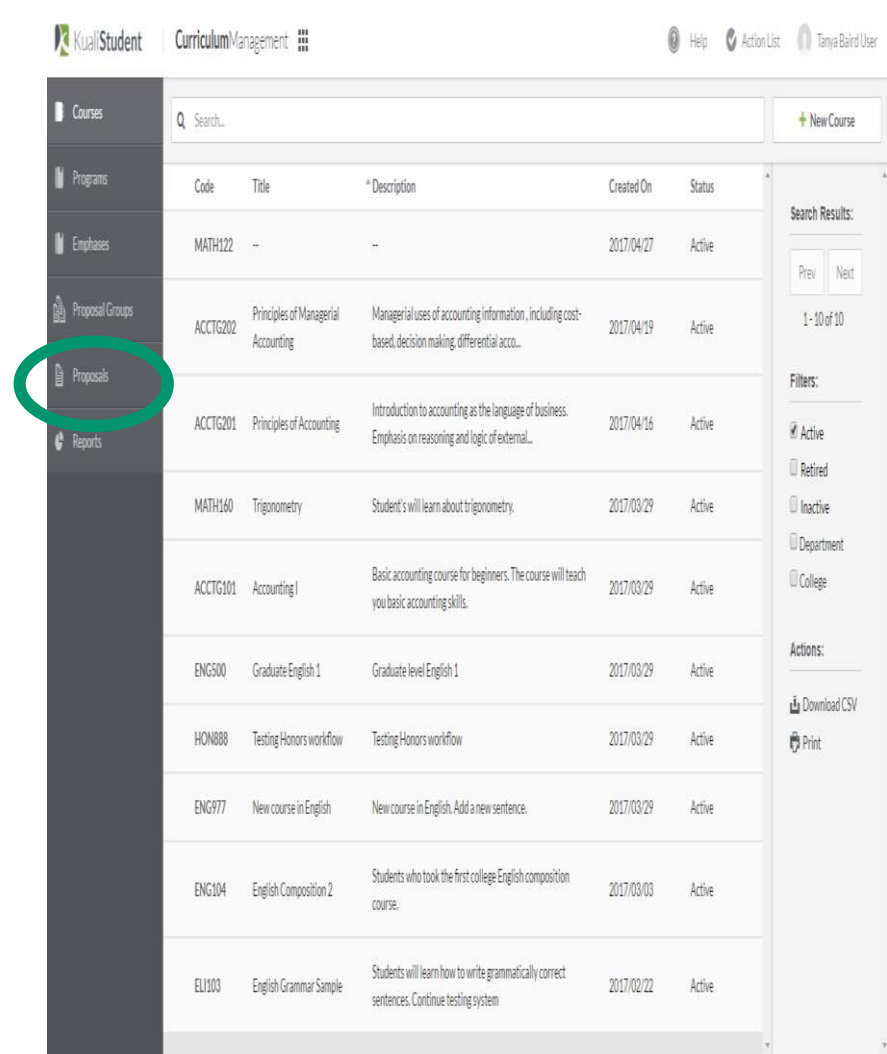# Workflow Approval and Proposal Review

Automated Workflow

Once a proposal has been submitted, it enters the Workflow process and only an approver can edit.

The Workflow process varies depending on the division/college.
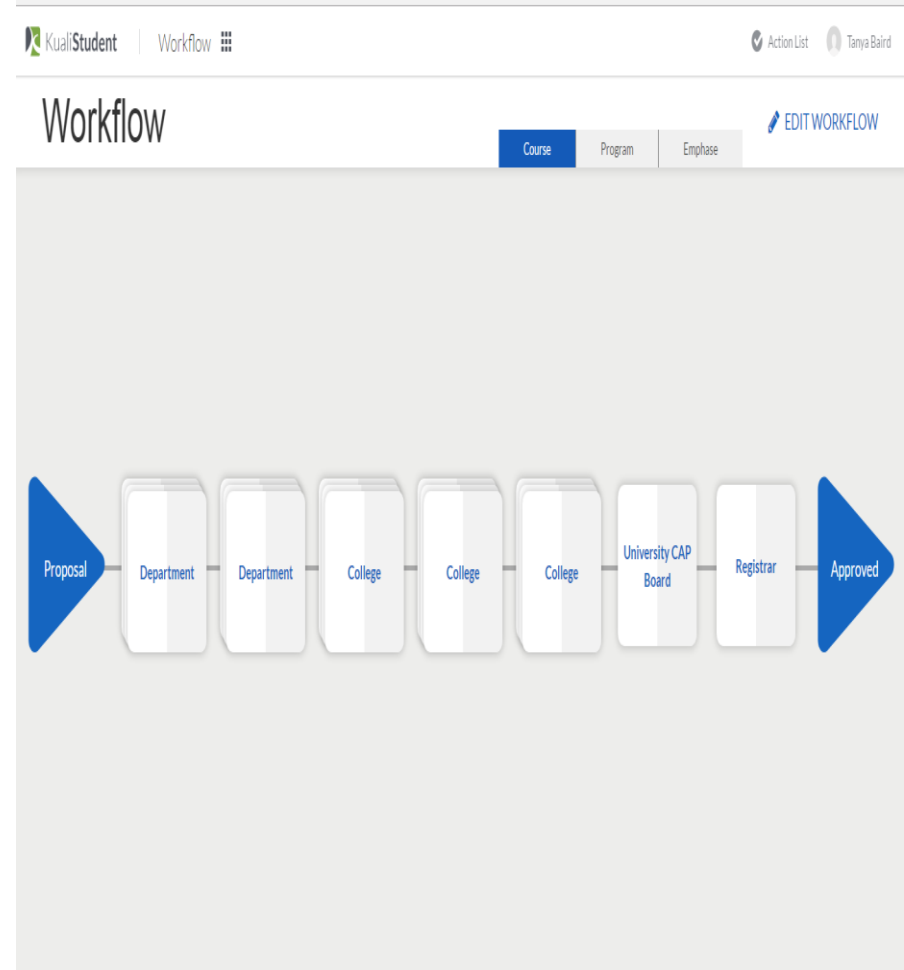
Proposal Workflow

- Users can view their proposal(s) and the approval process by choosing "Proposals" from the Curriculum Management home page.
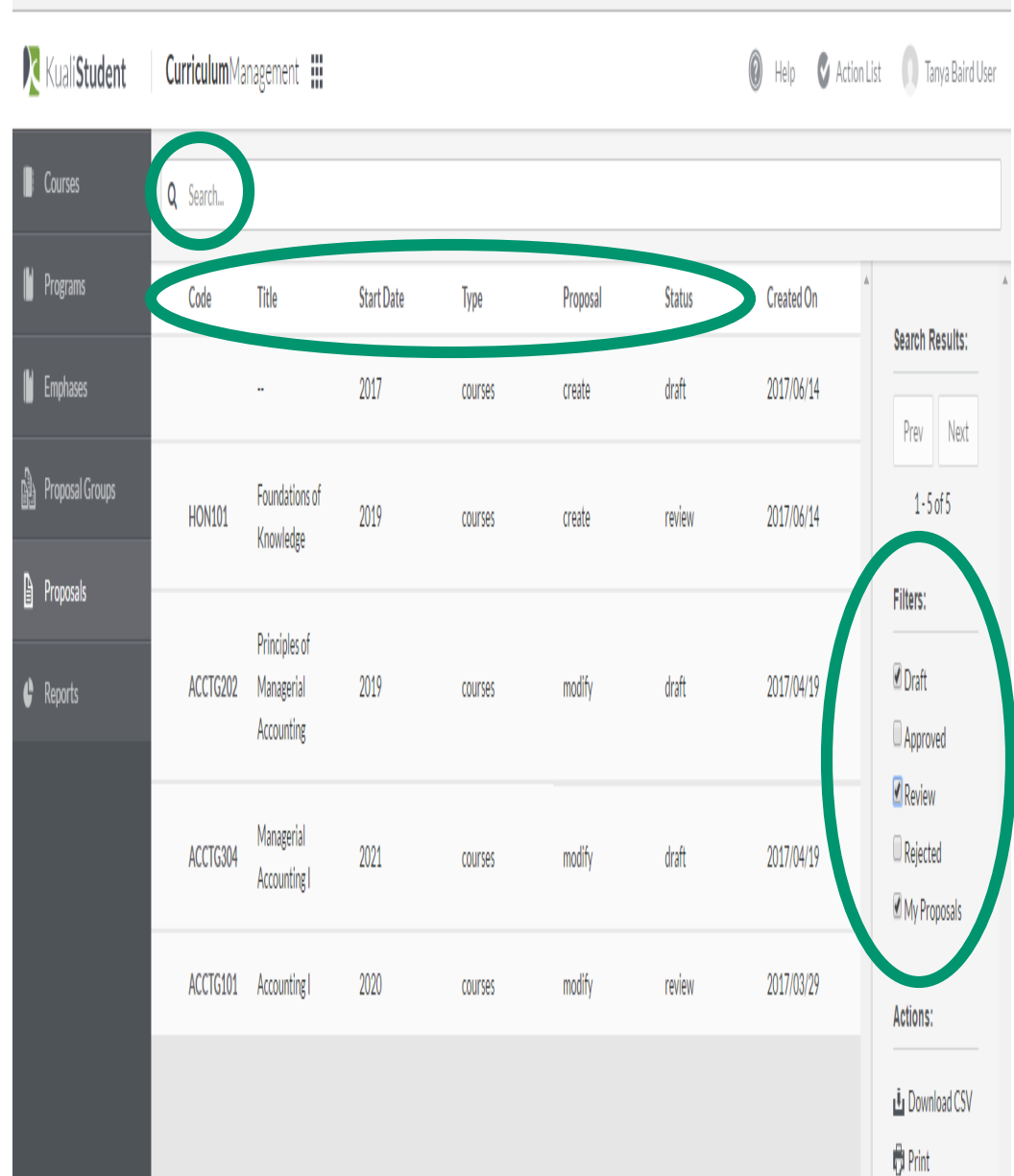
View Proposal

- Use the "Filter" option to display the proposals needed.

- Select proposal from the list.

- User also has the option of using the "Search" tool or the column filter options to narrow down the list of proposals

"InWorkflow" Screen

- The InWorkflow screen displays the proposal and requested changes (yellow) existing course information (blue).

- The Workflow Status displays the individuals required to approve the proposal, who has approved, and who is currently reviewing the proposal.

- While in Workflow Status, the proposer can withdraw the proposal at any time.

- Once the proposal has received final approval, it can no longer be withdrawn and becomes a permanent record of the university.

Proposal Groups

Proposal groups are used to track course proposals and/or programs that specific boards and/or committees are creating and/or reviewing.

Requests for groups must be submitted to the Office of the Registrar for approval and creation.

Proposal Groups
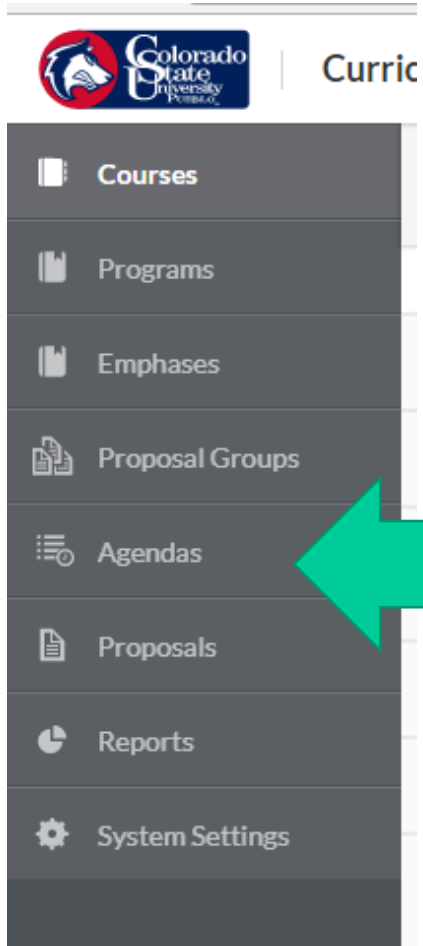
- Once a group is created, members can review the progress of the proposals and add to, or delete, proposals on the list.

- The list displays the status of the courses (active/rejected).

- The Proposal Group page displays the approval percentage of courses listed.
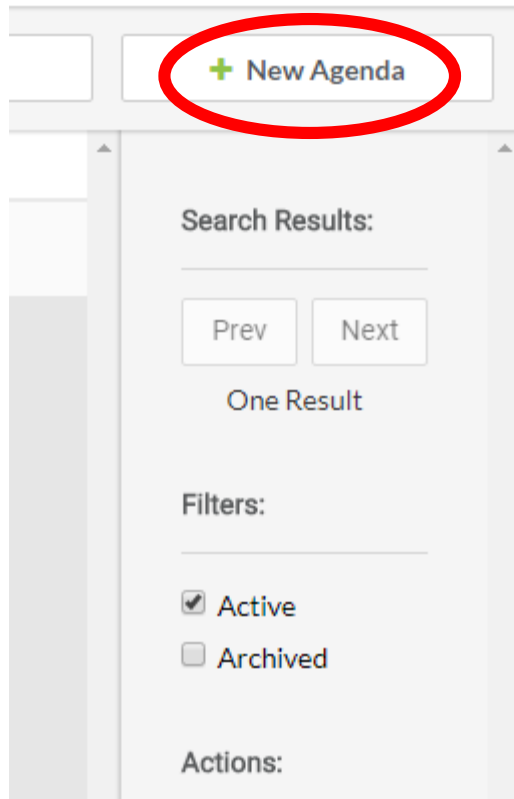
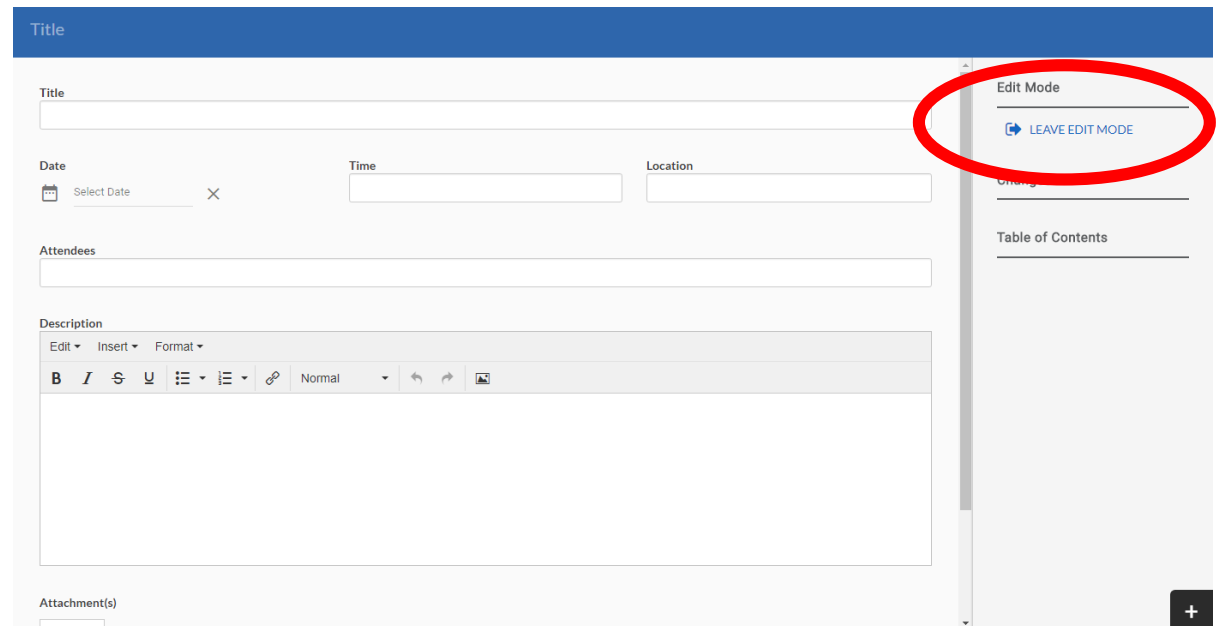- Tool can be used to create a quick meeting agenda.

Agendas

Agendas

Users can schedule meetings and share agenda information with their groups by using the Agenda tool.

Begin by clicking on the
+ New Agenda button at
top right.

Once created, click the "Leave
edit mode" to send to recipients.
Only users of the system can be
notified of meetings.

- Edit allows you to update your meeting and resend to group.

- Duplicate

- Send

- Print

- Archive allows you to save your agenda for future reference.

- Delete removes the agenda from the system.

Edit

Duplicate

Send

Print

Archive

Delete
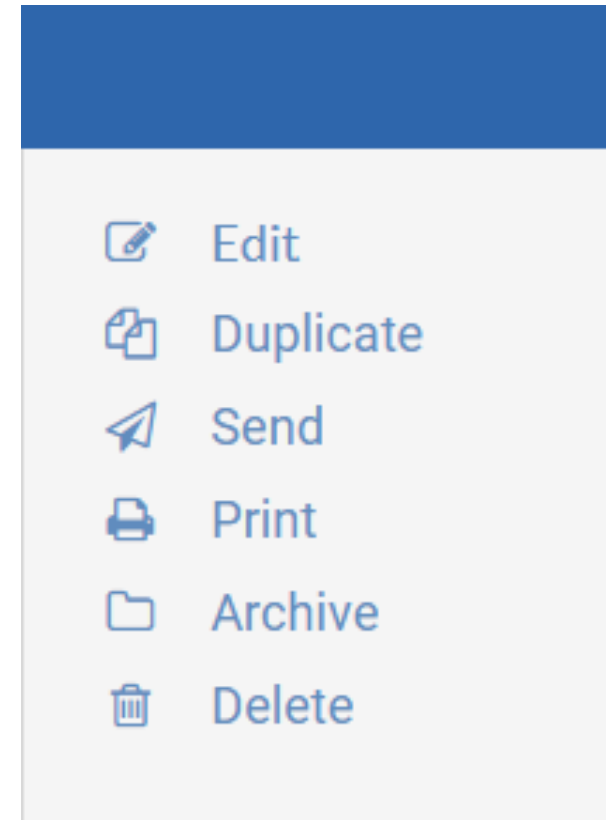
Reports

Report Options

Recommended:

- Agenda Report

- Courses

- Course Proposals

- User can build a report based on various filtering options.

- The order of selection in the filter dictates order shown in report.

- Ability to download report into CSV for manipulation and sharing.

- Ability to print.

- Administrator has the ability to create sample reports for individual filtering.
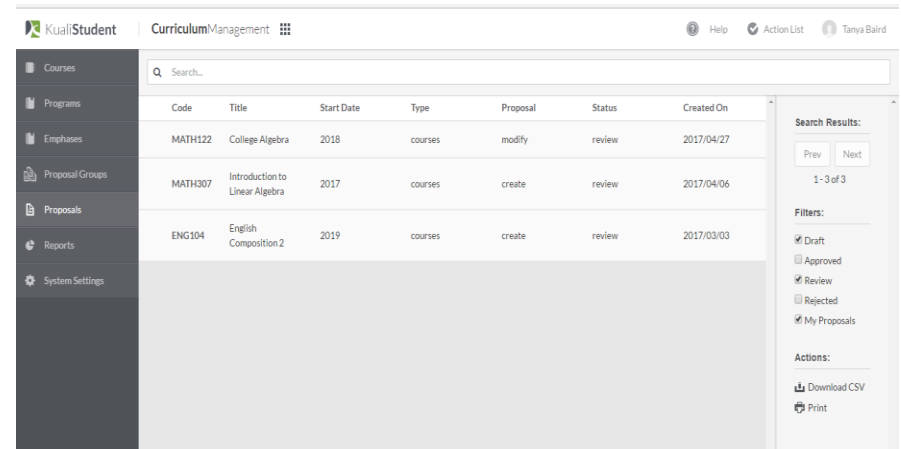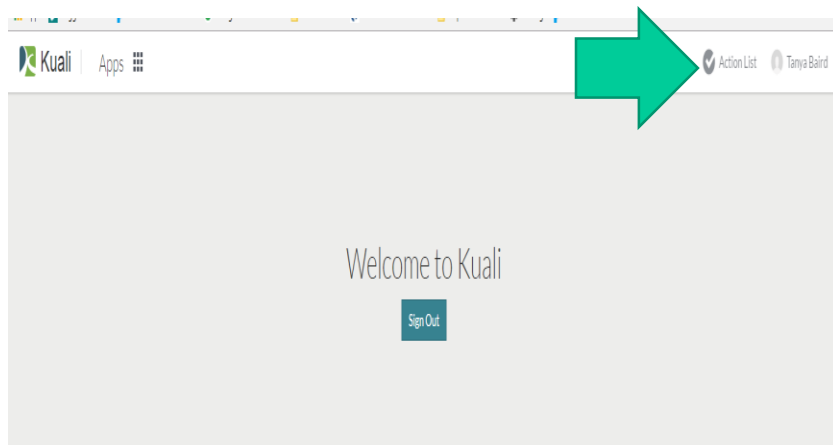
Approval Process

This section is for users assigned proposal "approval" status.

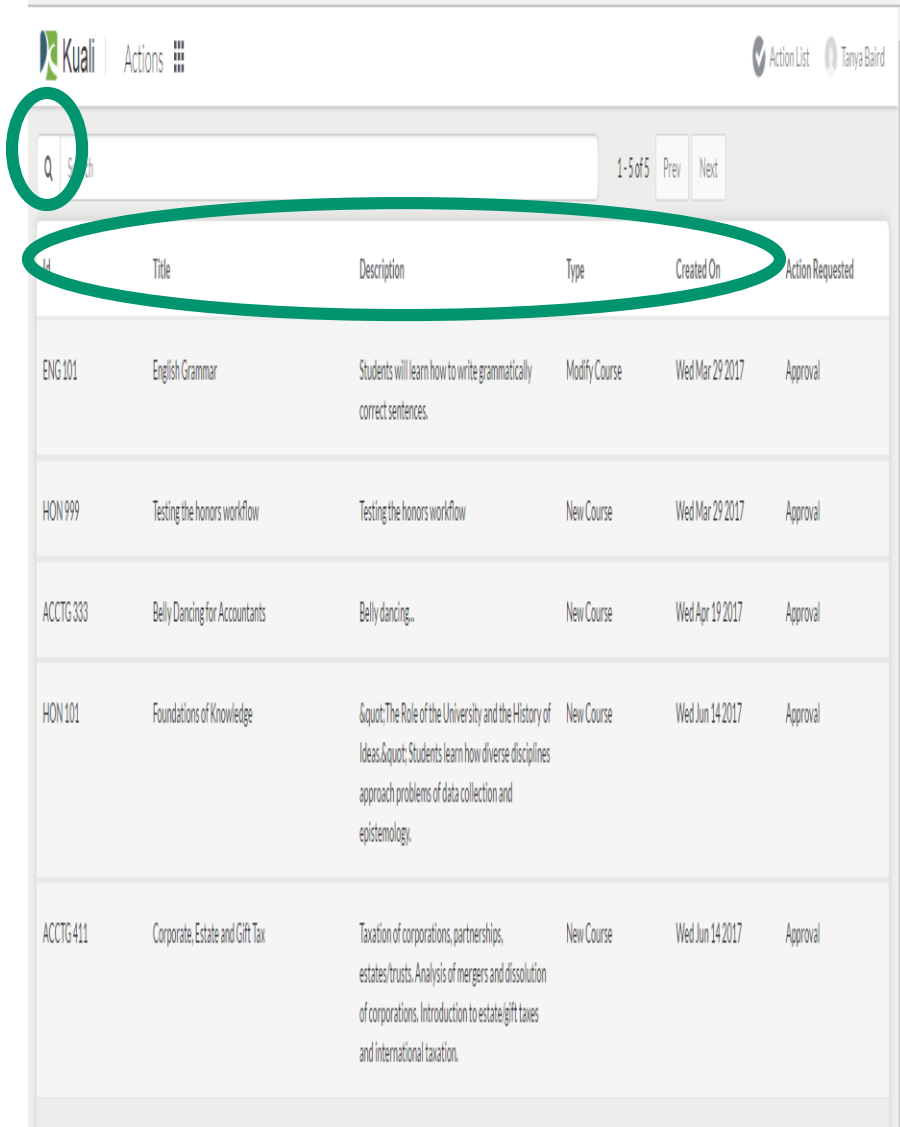# Users can access the proposals awaiting approval by:

Directly opening the "Action List" upon login.

OR

Opening the "Action List" inside the Curriculum Management application.

- User can search for a specific proposal by selecting from the displayed list, using the search function at the top of the screen, or by using the column filter tools.

- Place cursor over the proposal and right click. Proposal will open.

"InWorkflow"

(blue ribbon)

Approval options

Approve

Send back

Reject

Withdraw

Edit

Return to course

Duplicate

Print

Table of Contents

Change Feed

Approval Options

Approve:

- Approve with the option to add comments to the proposer.

- Automatically moves on to the next person/group identified in Workflow.

Send Back:

- Send back through the Workflow with comments for change.

- Options to have the proposal returned directly to approver or through the complete workflow.

- Add a comment.

Reject:

- Complete refusal of proposal.

- Add a comment to proposer.

- Curriculum Management stores the proposal in the "Rejected" archive.

- Rejected items must be duplicated and re-proposed.

Withdraw:

- Option for approver to withdraw the proposal.

- If withdrawn, the proposal is removed from the workflow and the system does not store a copy.

Proposal Editing

- Anyone in the Workflow approval process can edit a proposal.

- Curriculum Management is a system created to support the overall process.

- It is the colleges' role to set the initial proposal editing process for their department. Please contact your respect dean's office for more information.