Bundling in CourseLeaf

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What is Bundling?

Bundling allows a CIM user to submit a group of course and/or program proposals to go through workflow together and be approved or rolled back as a unit.

Why Bundle?

Often, proposals are dependent on the approval of other courses or programs. The most common case is when someone is proposing a new program along with new courses to support that new program. In CIM, users can propose new programs before new courses are created. They do not have to be submitted at the same time. However, bundling enables approvers to see the whole curricular request (the big picture of what is happening). Approvers can approve or roll back the whole package using one click.

Other examples of often-seen bundle types are:

- Two new programs in the same discipline or revising related programs – B.A. degree in Equity and Education and B.A. degree in Interdisciplinary Studies

- New courses to replace existing courses – Create NDRB 5493 Cognitive Neuroscience + delete BIO 5493 Cognitive Neuroscience

Note: <u>You cannot bundle multiple changes to the same degree program.</u> For example, if you have a semester credit hour change and a name change for the B.A. in English program, these changes must still be routed separately and approved one at a time in CourseLeaf.
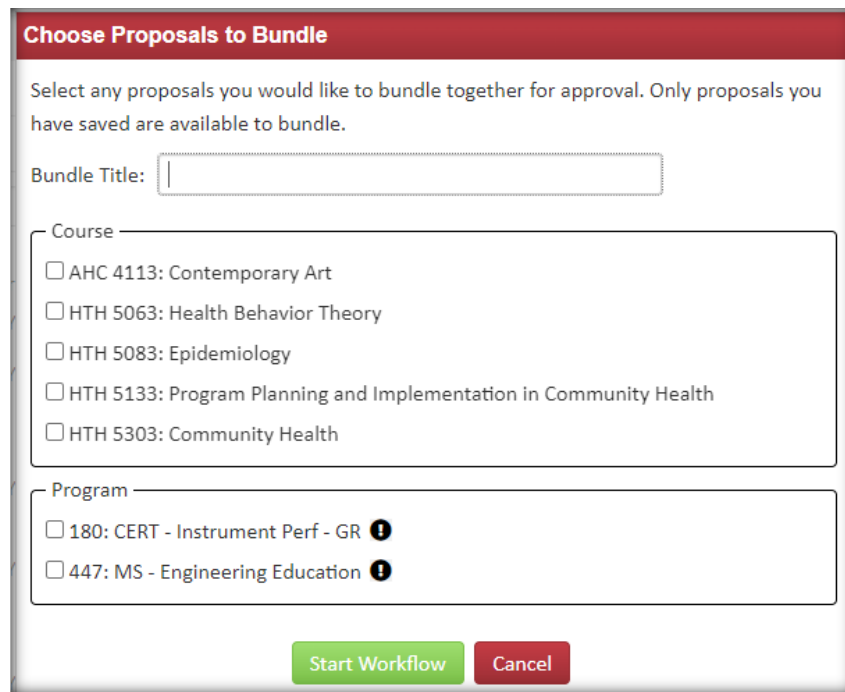
<u>Bundling works well when</u>

- Proposals need to go through the entire workflow and be approved together.

- Bundles are broken by rolling back the entire bundle to the initiator of the bundle, and every component proposal starts fresh.

- Workflows do not have a significant variation or extensive voting.

How Does Bundling Work?

A user works in CIM, creates multiple proposals, and saves changes. When they start workflow on one of the proposals, they will have the option to bundle their proposals together and move them through the workflow. The users will see all of the proposals that they have saved but not submitted in the workflow or proposals that are in the first step of the workflow.

If a user does not want to bundle these proposals

DO NOT check any of the other edited proposal in the bundling list. Then, click Start Workflow.

If a user wants to bundle some of the proposals

Step1: Select the proposals you would like to bundle together for approval by selecting the corresponding check box.

Step 2: Title the bundle with a name that makes it easy and intuitive to refer to and search for.

Note: The black exclamation marks next to the proposals are warnings that one or more required fields have not been completed within those proposals. The user must go to those proposals and fill out those required fields if they want to incorporate that proposal into the bundle.

Merging Workflows

When a bundle is created, CIM will then calculate individually for all proposal workflows in the bundle, taking into consideration workflows that have been set up for each type of proposal, applying any conditions to the steps, and considering all applicable departments, colleges, etc., to get the complete workflow for the bundle. It then looks for shared and unique steps to ensure that shared steps are not duplicated and unique steps are included. CIM then merges all proposals into one workflow. The proposals move through each shared step of

the merged workflow together. Unique approvers who have not been assigned to a bundled proposal's workflow will not see that proposal. Unique approvers will only see the proposals they have been assigned. The bundle will not reach the next shared step of the workflow together until all unique steps between each shared step are exhausted. See the example below:

Bundled Workflow Example

Course Proposal 1 Workflow	Course Proposal 2 Workflow	New Program Proposal Workflow
Core Curriculum Committee Chair		SACSCOC Accreditation Liaison
Dept UG Curriculum Committee Chair		
Advising Center Directors		Proposal waits for bundle approval
Dept Chair		
College UG Curriculum Committee		Collaborating Department Chair
College UG Curriculum Committee Chair		
College Course Fee Review		Advising Center
College Associate Dean of UG Studies		
Proposals wait for bundle approval		College Dean and Financial Lead
		Collaborating College Dean
UG Vice Provost		
Proposals wait for bundle approval		UG Academic Council Approval
		University Curriculum Committee
		University Curriculum Committee Chair
		Faculty Senate
		Faculty Senate Chair
		Academic Affairs
		SACSCOC Accreditation Liaison
		Initiator
		College Associate Dean of UG Studies
		UG Vice Provost
		Academic Affairs
		SACSCOC Accreditation Liaison
		Initiator
Registrar		Advising Center and Transfer and Transition
Banner		Catalog Editor

Key
- Shared Bundle Step
- Course workflow
- Program workflow
- Proposal waiting in bundle

Approving Bundles

When a reviewer goes to a bundled proposal to approve, they will see a table of contents area at the top of the "preview page" section that lists all of the assigned proposals in the bundle and links to those proposals. This allows the reviewer to easily view all assigned proposals. Reviewers must view all proposals before approving. Reviewers will get an error message if all proposals have not been viewed.
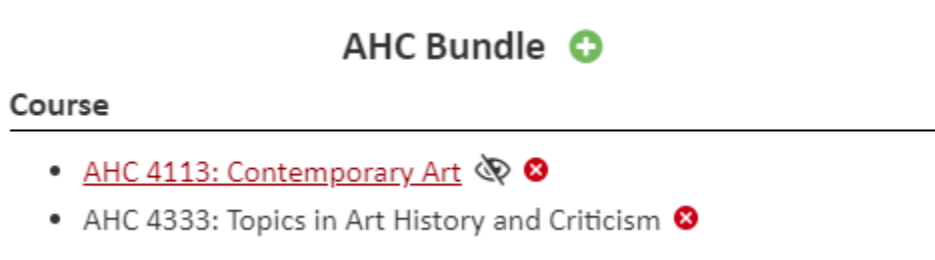
Rolling Back Bundles

When a reviewer rolls back a proposal in a bundle to a shared step, the entire bundle is rolled back. If a proposal needs to be removed from the bundle, there are two options:

1) Roll the bundle back to the initiator and have them remove the proposal that needs revisions. When the initiator sends the bundle forward again without the proposal that needs revisions, the workflow will automatically adjust.

2) Contact us for bundling questions. Administrators can remove the proposal from the bundle and update the pending workflow.

Synchronization

When the bundle reaches the final workflow step, the proposals are automatically unbundled for migration to Banner and the catalog. Once all of the bundled records are at rest again, the courses and programs can be edited independently from one another or re-bundled in different ways. However, the approval history of the bundle will be saved.

Contact Information

If you have any questions about the preceding procedures, please reach out to us via email or TEAMS.

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