

# 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 new courses to support a 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

### **Examples of bundle types that cannot be used at UTSA:**

- Proposing a new program and bundling all of the new courses with the new program proposal. A new program proposal must be a separate proposal due to the amount of time and approval steps needed to implement a new program.
- Multiple types of program changes to the same degree program - Semester credit hour change and a name change for the BA in English program. Due to the need for different approval processes for these change types, they must be routed separately and approved one at a time in CourseLeaf.
- Proposing changes to Graduate and Undergraduate courses or programs at the same time (see Catalog Revision schedule for each).

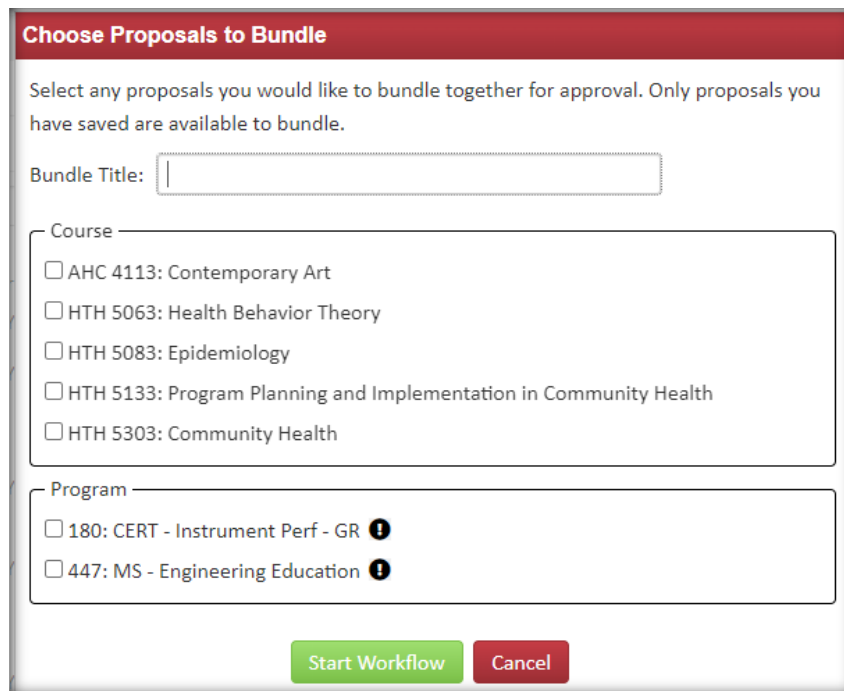
### **Bundling works well when**

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



**Choose Proposals to Bundle**

Select any proposals you would like to bundle together for approval. Only proposals you have saved are available to bundle.

Bundle Title:

**Course**

- ☐ AHC 4113: Contemporary Art
- ☐ HTH 5063: Health Behavior Theory
- ☐ HTH 5083: Epidemiology
- ☐ HTH 5133: Program Planning and Implementation in Community Health
- ☐ HTH 5303: Community Health

**Program**

- ☐ 180: CERT - Instrument Perf - GR ⓘ
- ☐ 447: MS - Engineering Education ⓘ

**Start Workflow** **Cancel**

### If a user does not want to bundle these proposals

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

### If a user wants to bundle some of the proposals

**DO NOT** bundle programs and courses.

Step 1: 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.

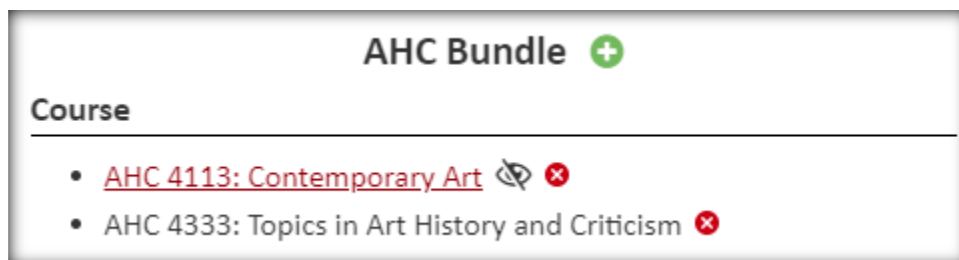
## **Merging Workflows**

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, schools, 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 that unique steps are included. CIM then merges all proposals into one workflow. The proposals move through each step of the merged workflow together.

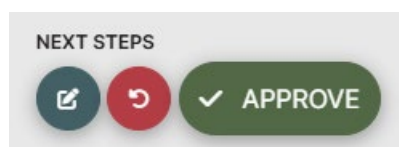
**Note:** Unique approvers who have not been assigned to a bundled proposal’s default workflow will see that proposal. Some program workflows require repeated approvers, we recommend only bundling program proposals of the same change type within the same department (ex: all administrative unit updates from “Carlos Alvarez College of Business” to “College of AI, Cyber and Computing,” or all programs with catalog updates and courses, or all new programs).

## Approving Bundles

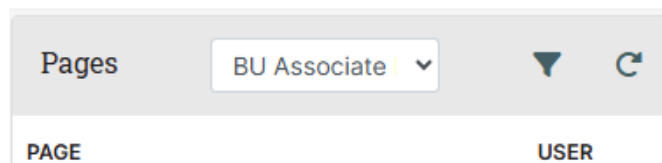
When a reviewer goes to a bundled proposal to approve, they will see a table of contents area at the top of the “preview page” section that lists all of the assigned proposals in the bundle and links to those proposals. This allows the reviewer to easily view all assigned proposals. Reviewers must view all proposals (click on each) before approving. Reviewers will get an error message if all proposals have not been viewed. Closing your browser or returning to the bundle on another day will mark all proposals as “unviewed.” You can click through the list to mark them as “viewed” again.



Once viewed, select “approve” and the whole bundle will be sent to the next step of the merged workflow.



**Note:** Only the first proposal will automatically disappear from your queue, you will need to refresh your approval queue to confirm that all proposals were sent to the next step of the workflow.



## Rolling Back Bundles

When a reviewer rolls back a proposal in a bundle, 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.

## **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.

Registrar Office:

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