FAQ

What if I don’t have the link to “Add New Course”?  
What if I am a course approver, but I do not have anything in my “Assigned curriculum requests” folder?  
- Contact the ICMS team as ICMS@ucdavis.edu as you may not have the appropriate permissions.

I don’t see the buttons at the bottom of the form to Create Copy, Create New Version, or Discontinue a course. Why?  
- Verify that the course you are viewing is approved.  
- Verify that the course you are viewing is within your department/subject area.  
- Contact the ICMS team as ICMS@ucdavis.edu as you may not have the appropriate permissions or you may need to be set up to manage a ‘subject’ area differently than on CAF.

A course I worked on was denied, but it’s not in my working folder, where is it?  
- CAF course update requests contained the user information only of the person who originally started the update in CAF. ICMS identifies this person as the “initiator.” When a request is denied or cancelled, it is returned to the “initiator.” If you inherited the request, the system does not know who you are. Contact the ICMS team for help.

SPECIAL NOTES

Working Courses and Submitted Folder:  
In order to migrate CAF data to your “Working courses” or “Submitted curriculum requests,” the migration used the CAF course initiator as the curriculum owner/initiator. When a request is denied or cancelled, it will return to the “initiator.” If that person is no longer with UC Davis, or no longer an ICMS user, the ICMS team will have to assist in recovering the record.

CAF Key:  
CAF used a unique identifier called the CAF Key. This data was migrated to each form for historical purposes. When you copy or create a new version of a migrated course, the CAF Key must be deleted.

Restrictions  
Restrictions on enrollment text has been migrated from CAF. There is a new drop down field, “Restrictions on Enrollment” that you should use to indicate the type of restriction you are requesting.

In Progress Grading fields:  
The In Progress Grading Type was pulled from CAF. The field above the Grading Type is a new field. The field “In-Progress Grading” will be a blank field. Update it if you edit a form. If there is a Grading Type, then this field should be YES.

Quick Reference Guide

Online information:  http://icms.ucdavis.edu/
Email:  ICMS@ucdavis.edu

Course VS Request:  
ICMS courses contain curriculum, catalog, and Banner information. You will see menu items “Search Courses” and “Search Requests,” as well as separate working folders for courses and curriculum requests.
- Courses – documents that describe new, updated, or discontinued classes for each department. Courses appear in the UC Davis General Catalog.
- Curriculum Requests – submission of a course into a workflow that requires approval. A Curriculum Request is the envelope that courses are put in for approval routing.

Assigned curriculum requests:  
Requests containing courses that require your review and/or approval. You will see a number in parenthesis under assigned curriculum if you are at the following levels in the ICMS system: Chair, College Committee, Dean for Professional Schools, Graduate Studies, COCI Reviewer.

Submitted curriculum requests:  
Requests containing courses you have submitted to the workflow for approval. You will see a number in parenthesis under the submitted curriculum if you are at the following level in the ICMS system: Staff, Faculty, or Chair.

Your working folder contains:  
Requests and courses you have started, but have not submitted for approval.
Definitions:

Course Status

<table>
<thead>
<tr>
<th>Course Status:</th>
<th>Choose...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Approved</td>
</tr>
<tr>
<td>In Working Folder</td>
<td>In Working Folder</td>
</tr>
<tr>
<td>In Change Request</td>
<td>In Change Request</td>
</tr>
</tbody>
</table>

Course has been reviewed and approved. (Archived)
Saved in a user’s working folder, not submitted.
The course is in the approval workflow within a Curriculum Request.

Course Change Types

<table>
<thead>
<tr>
<th>Change Type:</th>
<th>Choose...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose...</td>
<td>Choose...</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Cancelled.</td>
</tr>
<tr>
<td>Discontinued</td>
<td>New course (Course # has never existed.)</td>
</tr>
<tr>
<td>New</td>
<td>Changed: New version of same numbered course. (Also used to Reinstate discontinued courses.)</td>
</tr>
</tbody>
</table>

Curriculum Request Routing Status

<table>
<thead>
<tr>
<th>Request Status:</th>
<th>Choose...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose...</td>
<td>Choose...</td>
</tr>
<tr>
<td>Approved</td>
<td>Approved</td>
</tr>
<tr>
<td>In Workflow</td>
<td>In Workflow</td>
</tr>
<tr>
<td>In Working Folder</td>
<td>In Working Folder</td>
</tr>
</tbody>
</table>

Course has been reviewed and approved. (archived)
The request is in the approval process.
Request has been started, but not yet submitted to the workflow. It is in the initiator’s Working Folder.

NOTE: Cancelled and Rejected status may show in the drop down on the Search Request screen. They are for future use.

Curriculum Request Workflow Actions

<table>
<thead>
<tr>
<th>Workflow Action:</th>
<th>Choose...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve Request</td>
<td>Approve Request</td>
</tr>
<tr>
<td>Relegate Request</td>
<td>Relegate Request</td>
</tr>
<tr>
<td>Deny Request</td>
<td>Deny Request</td>
</tr>
<tr>
<td>Cancel Request</td>
<td>Cancel Request</td>
</tr>
</tbody>
</table>

Approve the course form to the next workflow step.
Move the Request backward in the workflow steps.
Deny the course, sending it back to the initiator’s “working folder”.
Do Not Select – For future use.

NOTE: Deny is used by Chairs to return work to the initiator. Relegate is used by all other approvers to move the request backward in the workflow.

Create a Curriculum Request

Create a new version (change), copy, or discontinue (cancel) an existing course:

1. Search for an “Approved” course.
2. Select the course from the search response.
3. Scroll to the end of the form.
4. Use the buttons to copy, update, or discontinue your course.
5. Update and SAVE the course form. (Use Field Help to assist in determining your field entries.) The course will be in your working folder.

Create a REQUEST to route the course form for approval:

1. After creating the course form using Add, New Version, Copy or Discontinue, review your working folder for the course to submit (curriculum tab).
2. Put a check in the box of the course to submit and click on the “Submit Selected” button.
3. Enter course number in Subject/Course# title field, complete school/college drop down, add notes, and any justification.
4. Click on Create Request. You can now see the Request Number at the top of the form, and the request is in your working folder.
5. If you are ready, click on Submit Request For Approval.

The Request will be in your Submitted folder. The workflow tab will let you know what step of the workflow the course is at.

How to find and review the routing status of a course:

A

1. Search for a course.
2. Click on the course code to view the form.
3. Click on the View History to obtain Curriculum Request number.
4. Click on Search for Request in your Quick Links console.
5. Type the Request number in the Request Number field and ENTER.
6. Click on the Curriculum Request you are looking for.

NOTE: Deny is used by Chairs to return work to the initiator. Relegate is used by all other approvers to move the request backward in the workflow.

B

1. Via the Quick Links console or the menu pull down, go to Search Requests.
2. Use the Request Title to search for the course number.
3. Click on the Curriculum Request that has a status of “In Workflow”.

Search Curriculum Requests

| Request Number: | Request Title: AAS 001 |