**Bundling in CourseLeaf**

**What is Bundling?**

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

**Why Bundle?**

Often, there are proposals in CourseLeaf that can be routed as one package. Bundling enables a CIM user to attach all proposals together and route in one workflow. Approvers will then see the whole curricular request (the big picture of what is happening). Approvers can approve or roll back the whole package using one click. The majority of bundles at UTSA are related to catalog revisions; however, there are some program changes that can be bundled as well.

**Examples of bundle types that can be used at UTSA:**

- Adding multiple new courses for a new program.
- Adding supporting courses for multiple new programs in the same discipline.
- Adding a new course to replace an existing course – Create NDRB 5493 Cognitive Neuroscience + delete BIO 5493 Cognitive Neuroscience.
- Making the same type of program change to related programs – Change method of delivery for the B.A. in Equity and Education and the B.A. in Interdisciplinary Studies -or- change CIP code for the B.A. in Art and the B.F.A. in Art.

**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 route separately 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 significant variation in steps and approvers.
How Does Bundling Work?

One user works in CIM, creates multiple proposals, and saves changes. When the user starts the workflow on one of the proposals, they will have the option to bundle their proposals together and move them through the workflow process together. The user will see all of the proposals that they have saved but not submitted to 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 proposals in the bundling list and DO NOT add a title. Then, click Start Workflow.

If a user wants to bundle some or all of the proposals:

Select the proposals you would like to bundle together for approval by selecting the corresponding check box. 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 would have to go to those proposals and fill out those required fields before starting the workflow bundle.
Merging Workflows

When a bundle is created and starts the workflow, CIM will look for a primary proposal and will assign that status to whichever proposal the user first hits Start Workflow on. 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 add or remove approval steps, and considering any swap words for departments, colleges, etc., to get the complete workflow for the bundle. CIM then merges all workflows into one workflow. It then looks for shared steps and unique steps to ensure that shared steps are not duplicated, and unique steps are included.
Approving Bundles

When a reviewer goes to a bundled proposal, they will see a table of contents area at the top of the “preview page” that lists all of the assigned proposals in the bundle and links to those proposals. This allows the reviewer to easily view them. Reviewers must view all proposals before approving. The eye icons show the reviewer which proposals they have not viewed. Reviewers will get an error message if all proposals have not been viewed.

**Note:** Closing your browser or returning to the bundle on another day will mark all proposals as “unviewed.”

To approve the bundle, click through the list of proposals to mark them all as “viewed.” Once viewed, you can approve the bundle and it will be sent to the next step of the merged 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 for doing this.

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 a CourseLeaf Administrator at academicprograms@utsa.edu for program bundles and catalogeditor@utsa.edu for catalog/course bundles. The administrator 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 integration with the catalog. Once all of these records are at rest again, they become editable and can be edited now independently from one another or re-bundled in different ways. However, the approval history of the bundle will be saved.
**Bundling Administrator**

CourseLeaf administrators automatically have access to the green plus button below to add a proposal to a bundle or to use the x icon to remove a proposal from the bundle. A Bundling Administrator can be added to Role Management if needed for a review step in workflows. The Bundling Administrator step can also be used for a non-administrative user who requests the ability to alter a bundle or alter the pending workflow for the bundle in approve pages.

Proposals should only be added or removed from the bundle at the beginning of a workflow. Workflow is only calculated one time when the workflow begins. If an administrator adds or removes a proposal when it is further along in the approval process, the workflow will not update, and the proposal and the bundle will both remain in the merged workflow. An administrator would have to manually update the pending workflow. Best practice is to roll back the entire proposal to the initiator. If that is done, the bundle will be unbundled naturally and retain a record that it was bundled. The workflow would then adjust appropriately when Start Workflow is selected again.
Contact Information

If you have any questions about bundling program changes, please reach out to us via email or Teams chat.

Office of Continuous Improvement and Accreditation:

Academic Programs: AcademicPrograms@utsa.edu

If you have questions about bundling catalog revisions/course changes, please reach out to the Registrar’s Office via email or Teams chat.

Registrar Office:

Catalog Editor: CatalogEditor@utsa.edu

Shae Large Shae.Large@utsa.edu Registrar Officer II

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