Reviewer and Approver in eLumen Training Guide

This training will guide the discussion and give specific directions for using Curriculum for roles that will review and approve proposal workflows for the creation, revision, or inactivation of courses or programs.

***Reviewer and Approver roles are: Articulation Officer, Distance Education Coordinator, Division Members, Division Chair, TRC Members, and Curriculum Members***

Workflow Management

All workflows for courses, programs, and SLOs that are waiting for your review will appear in both the Workflows tab within your Inbox and on the Curriculum Dashboard. Make sure you select the role that you need to review or approve in (some have multiple roles and will have to do this for each when its time for that specific role). Navigate to the Inbox to complete the review of a course or program workflow.

Under the Active heading is where all of the workflows that require your immediate attention are at. To Review a workflow select Start Review and choose either the Step View (which presents each section of the proposal on a separate screen) or the Outline View (which presents the entire proposal on a single page).

Below the Active workflows eLumen also lists the current Stage of other program proposals that might be of interest including those Coming Soon, Processing, or Recently Reviewed.
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Courses

*Reviewing, Editing, and Approving*

eLumen provides three types of functionality for reviewers that can be customized for each part within the sections of a proposal. As a reviewer, you will always be able to see all of the sections and parts of the proposal. In each section, you will see buttons outlining your options.

*Review*

When viewing the proposal, you will see a review button in each part you are assigned. Please review the contents of that section for accuracy and check the Review box to acknowledge that you have seen the content.

Leave any feedback or corrections in the comments box at the end of the section and select **Add Comment**. You will see any previous comments from other reviewers.

You cannot submit the workflow until you select **Review** on all parts.

Multiple review roles can be added to a single stage, and the workflow will not progress until all roles have reviewed the course. Please complete your reviews in a timely manner.

Select **Review All** to automatically select Review on all parts of the proposal.
Approve (Send Back Feature)

If you are assigned the Approve action for a part of a proposal, your Review button in each section will be replaced with the option to either Approve or Request Change.

If Request Change is chosen for any part, the Submit button will change to Request Change and is available to send back at that time. It is best practice to review all areas before selecting Request Change to make sure the initiator is aware of all areas that need adjustment prior to sending it back.

Upon selecting Request Change, the workflow will return to the first stage and the parts marked Request Change will be highlighted in red for the proposal’s originator. Once the proposal’s originator submits their changes, the workflow will progress through the workflow again, continuing to the second stage.

You can leave feedback or corrections in the Comment box at the end of the section by selecting Add Comment. You will see previous comments from other reviewers.
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**Edit**

When a reviewer is assigned the Edit action for a part of a proposal, they will be able to change the content in those parts in addition to reviewing and commenting. Select the **Edit** button to make any changes.

Select the **Edit** button to open the fields to make changes.

**To Submit to the Next Stage**

You cannot submit the workflow to the next stage of the workflow until you select Review or Approve on all parts of the workflow. The blue submit button will stay inactive until all parts of the workflow have been marked as reviewed. Select Approve All to automatically select Approve on all parts of the proposal.

Inactive Submit button:

Active Submit button:
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A confirmation box will appear informing you whether or not the course will be moving on to the next stage, or if additional roles need to review the course. Select **Submit** to confirm or cancel to go back to reviewing the course.

Programs

Participating in the workflow process for programs is similar, but not identical, to courses. Finding the program to review, entering the workflow, and overall actions are the same. Key differences are noted below.

**Reviewing, Editing, and Approving**

**Review**

When viewing the proposal, you will see a review button in each part you are assigned. Please review the contents of that section for accuracy and check the Review box to acknowledge that you have seen the content. Select **Next** to move to the next tab. Use **Previous** to return to a tab you already passed.
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Leave any feedback or corrections in the Feedback area at the end of the section. You will see previous comments from other reviewers.

When reviewing, be sure to select **Next** or **Save and Continue** all the way through the program until the last tab. Then select **Submit** at the end. The program will only move to the next stage if all sections have been marked as reviewed.

Workflows are highly configurable, check with your Curriculum Specialist to determine how your program workflow has been configured. If multiple review roles have been added to a single stage, the workflow will progress once all sections of the program have been reviewed once. This means it may move before you have reviewed. However, if different reviewers have different parts to review, the program will not move forward until all reviewers have completed their review.

**Approve (Send Back Feature)**

In a program workflow, the option to “Send Back” is available by selecting “Disapprove” in an area of the program.
Once “Disapprove” has been selected for a given area, the options at the bottom of the program will include “Send Back”. Use this button to choose where to send the program to be edited. The option “Table Workflow” is a legacy button that should not be used for program proposals.

*Edit*

When a reviewer is assigned the Edit action for a part of a proposal, they will be able to change the content in those parts in addition to reviewing and commenting. Select the Edit button to make any changes.
Navigating from Tab to Tab

In a program workflow, the buttons at the bottom of the workflow are required to move from one tab to the next. Use **Next** or **Save and Continue** to move to the next tab. Use **Submit** after the final tab. If any part of the workflow remains unreviewed, the proposal will stay in the Inbox until all areas are reviewed/approved or the workflow is sent back.

To Submit to the Next Stage

Make sure all areas assigned have been reviewed, select **Next** or **Save and Continue** on each tab. Then select **Submit** at the end. Unlike a course workflow, the program workflow will not provide a confirmation message before moving on. You know the program has moved on when it is no longer visible in the Inbox.

After Submitting

Once you have reviewed all areas, and submitted the workflow to the next stage, you can watch the progress of the proposal on the Curriculum Dashboard. If you saved work as a draft or did not review all parts and will come back to finish later, return to the Inbox to pick up
Articulate

As a Curriculum Specialist find and select an approved program in the Curriculum Library. Select Articulate and then the Curriculum Technician tab. Enter the Control Number, Credential ID (if appropriate), approval dates, and Time to Next Review. When complete, select Save.