New Proposals

When you need to create a new proposal, from your Dashboard you'll need to click on the link for "New Proposal", and then choose from the list of available approval processes that your administrator has made available to you. There are four tabs across the top that can be used to help narrow your selection – All Processes, Courses, Programs, and Others.

- **All Processes** – Displays all Approval Processes within the System
- **Courses** – Displays only those of the Course type
- **Programs** – Displays only those of the Program type
- **Others** – Displays only those of the 'blank' type. These processes will not allow you to import or export information.

You can also use the "Sort by" drop-down menu to sort processes by either title or type to help select. Processes featuring the blue and green arrows indicate a crosslisting option, within course type processes. Processes with a title that is grayed out and italicized are in edit mode and undergoing revisions by the administrator – you will be unable to select these at this time. Processes that are grayed out are deactivated and unable to be used.

If you would like to preview an approval process before starting it, you can select the preview form icon. This will open a new window, previewing only the form of the proposal. None of the fields will be functional within the preview.

To begin a new proposal, click the new proposal icon.

Creating New Items

When you are filling in a proposal to create a new item, you will need to fill in all required fields within the form. Required fields are noted with a red asterisk. As you work in the form, be sure to save your work often by using the save at either the top of the page, or the floating "Save All Changes" at the bottom. As you work, fields you have modified will be highlighted in blue and will stay highlighted until you save. Once you save, the blue highlight will fade. If you try to navigate away from the page without saving your changes, the browser will prompt you to save before allowing you to leave.

Once you have reached the end of the form, you will need to launch the proposal to send it into the workflow. To launch it, you will need to scroll back to the top of the page and click the "Validate and Launch" icon from the upper left corner.

At this time, the system will verify if any required fields have been left empty. If they have, they will be highlighted in yellow and the proposal will be unable to launch. A message will appear indicating that you have missing information – if you click "Show me", it will take you to the first of the required fields.

Once all the required fields have been filled in, the proposal will be able to launch. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the work flow. You may choose to review the section on Editing a Proposal, or move on to Providing a Decision.

Changes

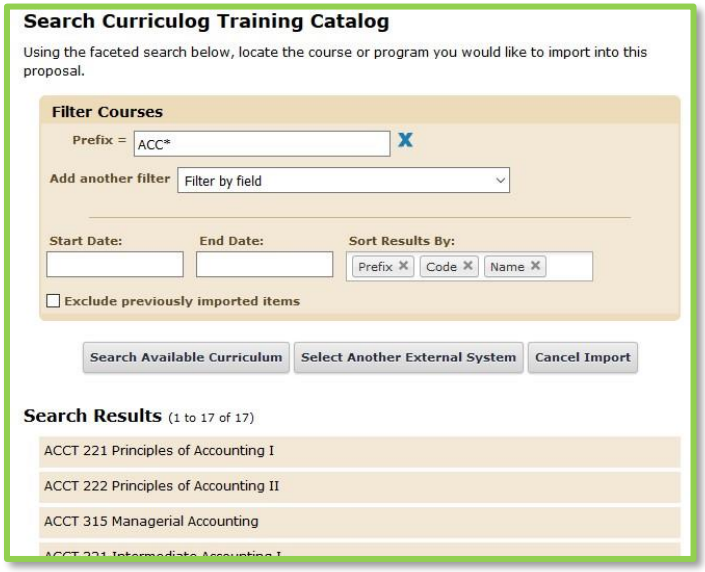
When you are creating a proposal for revisions to a course or program that already exists – you will begin by importing the existing catalog information.

Note: *If this proposal is for a program, the first step will be to indicate if this is a program or a Shared Core in the Program Type field. This must be declared prior to choosing the import icon.*

Start by selecting the import icon from the upper left corner of the proposal.

This will open a pop-up window listing all available catalogs you can import from. The available catalogs are determined by your System Administrator.

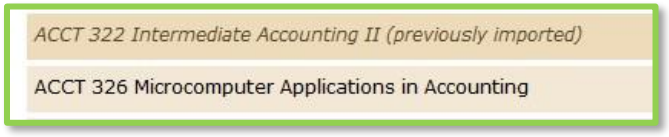
Next, you will be presented with filter options that may be used to find the course you would like to import.



The search will default to searching through all courses, but you may use the “add filter” drop-down menu to select additional filtering options. Each option allows you to select a field from the courses template that you can then enter a value to search on.

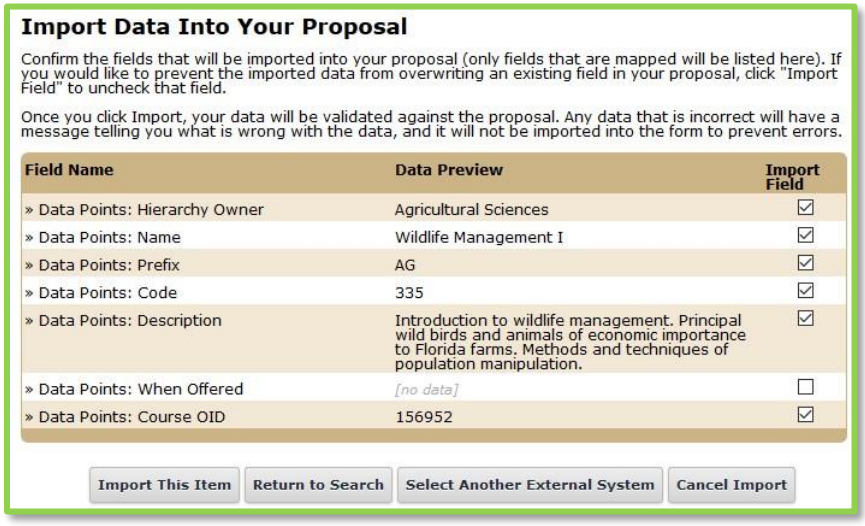
Once you have added at least one filter, you can not leave the field blank when you search, or you will receive zero results. It will also not accept partial searches – for example, ‘ACC’ will not return any results for ‘ACCT’; but you can use the * as a wildcard. Entering ‘ACC*’ for example, would return ‘ACCT’ courses.

The “Exclude previously imported items” checkbox is a toggle that would remove items that have been imported by any user from your list of search results. If unchecked, the items would appear in your results but would be italicized to indicate that they have been imported previously. It will not prevent you from importing the item a second time; it will just serve as an indicator.



Note: *If the cache has been cleared by an administrator, the exclude previously imported items flag may be reset.*

Once your search has located the item you would like to import, click on the title. You will then be able to preview all mapped data available to import. By default, all details will be marked for import, but you can choose to uncheck any items if you do not want to import them. To complete the import, click ‘Import this Item’. You may also choose to “Return to Search” to choose another item, or “Select Another External System” to choose another catalog, or “Cancel Import” to cancel entirely.



Once you have imported the information, the window will close, and your proposal will be populated with all of the information from the course catalog.

Now that you have imported the existing catalog data; the best practice is that you do **NOT** make changes to the existing information. Complete any remaining required fields and launch your proposal by selecting the launch icon ▶ from the upper left corner of the Proposal. This will be critical to ensuring the User Tracking function is able to capture all edits as the tracking begins on step one.

Once the proposal has been launched, it will move to the first step in the process. As a best practice, we suggest that the first step in any proposal is the originator – meaning the proposal would return to you. If your administrator follows this practice – you now have an additional opportunity to further revise your proposal before sending it on to the next step in the work flow. You may choose to review the section on Editing a Proposal, or move on to Providing a Decision.

Proposal Toolbox

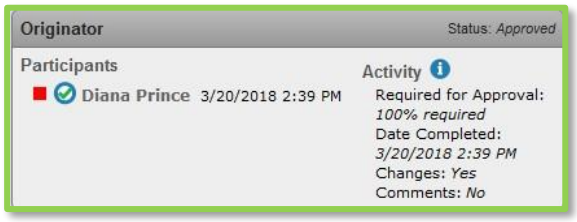
The Proposal Toolbox appears on the right-hand side of the screen when working within any proposal, and includes several options for interacting with your proposals.

Discussion

The first icon indicates the Discussion tab. The Discussion tab is the default view of the Proposal Toolbox that you will see when first accessing a proposal. It is used to display the User Tracking information, as well as any comments that have been entered on the proposal. More details about the User Tracking and comments are listed under the Editing a Proposal section.

Status

The next icon is for the Status tab. The status tab will allow you to review the Proposal History – a log of all of the steps that have already occurred, the step it is currently on, and any steps that still need to happen.



On each step you'll find the name of it within the darker bar at the top along with the status – for example, this screenshot indicates that the step was approved. Under Participants you will be able to see any users who were required to take action on this step; if they performed any edits on this proposal you will see an edit color assigned to them (red, in this example), and if they provided a decision you will see the decision in the circle next to their name (approve).

To review step options and see permission levels, click on the next to Activity within any step.

In the Rules portion, you will be able to see the settings for each step.

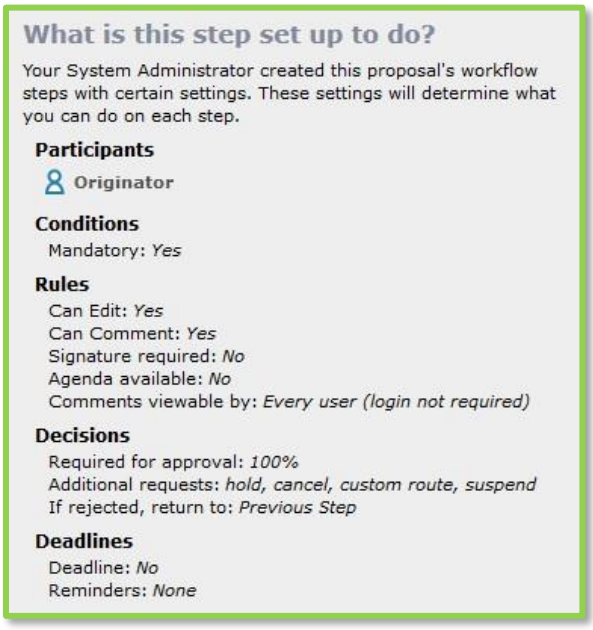
- *Can Edit: Yes* indicates that a user on this step will be able to make modifications.

- *Can Comment: Yes* indicates that a user on this step will be able to leave comments.

- *Signature required: Yes* indicates that a user on this step will be required to provide a signature when they place their decision.

- *Agenda Available: No* indicates that this step will not allow for committee functionality, or for the proposal to be placed on an Agenda at this time.

- *Comments viewable by: Every user* indicates the level of transparency the administrator has set.



Note: *Only an administrator can modify these settings.*

Knowing what permissions you have on your step will make your work within Curriculog easier. Using the step in the screenshot to the right as an example – knowing that an 'Agenda Available' is set to no, you won't be looking to create an Agenda for this step or wonder why there are no committee options available.

Signatures

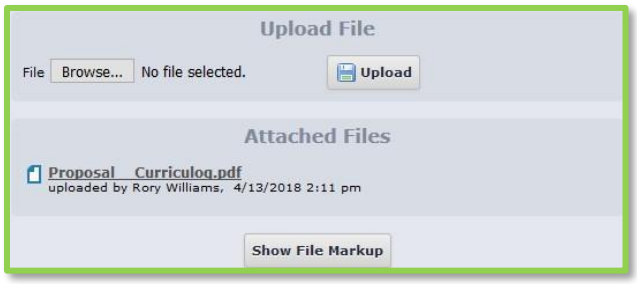
If your administrator chooses to require a signature, they will be recorded on the signature tab when a user makes a decision on a proposal. Depending upon the settings – a user may provide their signature in one of two ways. They may either provide it via a signature pin, or through a paper document that is scanned and uploaded. Both types of signatures will be recorded in the signatures tab, and if the paper signature is used, it will be available for download.

As a best practice, we recommend using the signature pin.

Proprietary & Confidential

Files

The Files tab will allow you to attach documentation relevant to your proposals. Any user who is an active participant on a step may upload files to a proposal, and although the maximum file size limit is 20 MB for each file – there is no limit to the number of files that may be attached to the proposal.



Once files have been attached, they will be visible to all users. The file markup will indicate who uploaded each file and when through an activity log.

Note: *In older versions of browsers, uploading files as attachments that contained spaces in the file names may have resulted in difficulty when downloading the file later. Although newer versions of browsers are no longer experiencing this issue, as a best practice, when uploading attachments, we recommend that you ensure there are no spaces in the file name.*

Decisions

Once you have completed your work on the proposal and you are ready for it to move to the next step, you will need to enter a decision. To provide a decision, select the Decisions tab from the Proposal Toolbox.

The decisions that are available to you will vary based on the settings your administrator has selected for each step, but this manual will cover all options available.

- **Approve -** Selecting Approve is indicating that you are approving the proposal in its current state and are signing off on it to move to the next step in its workflow. If you are the only participant on the step, the proposal will advance automatically. Entering a comment is optional when selecting Approve.
    - If you are **not** the only participant on the step, and the step requires 100% approval in order to advance, then the step will wait until all participants unanimously agree to approve or reject.
    - If you are **not** the only participant on the step, and the step requires any other threshold lower than 100% approval in order to advance, the proposal will remain on the step until all participants have voted even if it has received enough votes to be approved. This means that if the vote is set to require 75% approval and three of the four participants have already approved, the proposal will remain on the current step until the fourth participant makes a decision.
    - If this is a committee step but you are a non-voting member, the step will not move on until the Agenda Administrator has placed their decision.

- If this is a committee step and you are the Agenda Administrator, when you place the decision to approve the step – you will be placing it on behalf of the committee and it will advance to the next step.

- **Reject -** Rejecting a proposal indicates that you are not approving of it in its current state. You will be required to enter comments in order to submit the decision to reject, and as a best practice we would strongly suggest using the comments to explain the reasoning behind submitting a rejection. Depending upon the settings an administrator chooses – a proposal may take one of two paths when it has received a rejection.
  - **Originator** – If the originator chooses to send a proposal back to the originator, the proposal will create a new step titled 'Originator', followed by each step from the beginning. This effectively causes the workflow to start over.
  - **Previous Step** – If the originator chooses to send a proposal back to the previous step, the proposal will return to the previous step only and then resume the normal workflow.

- **Hold** - Submits a request for the proposal to not advance in the workflow. The request is sent to the administrator, who will approve or reject the request. If the administrator approves the request and places the proposal on hold, the users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. This would typically be used to ask for additional time for revisions on a proposal when a deadline is approaching, as the item will not trigger the deadline when it has been placed on hold. Only an administrator can lift the hold on a proposal.

- **Suspend** - Submits a request for the proposal to be suspended from the workflow. Like the request for 'Hold', it is sent to the administrator, who will approve or reject the request. If the administrator approves the request and suspends the proposal, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed.

  Note: *In the case of both Hold and Suspend, if you were to place a proposal on either status after it had been in progress for 6 days, and it had an upcoming deadline after 10 days – and the proposal stayed on its status of Hold or Suspend for another 10 days – the day that you return it to the workflow the deadline will trigger as it has now passed its original 10 day deadline.*

- **Cancel** - Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the administrator who will approve or reject the request. If the administrator approves the cancel request, the proposal will be referred to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision. This is the only way you can delete a proposal after it has been launched.

- **Custom Route** - A Custom Route is an additional ad hoc step outside the steps in the approval process that the administrator originally provided and require administrator approval. They will allow you to invite additional users or committees into a workflow for additional feedback. Custom Routes are covered in more detail in the next section.