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Proposals - Editing a Proposal

Client Education Team
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Proposals awaiting a decision from you will be listed in the My Tasks tab of the Proposals Module. This tab will display by default when logging into Curriculog.


When you hover over a proposal, several icons will appear giving you options for interacting with the Proposal. Descriptions of each icon can be found above.

To make a decision or interact with the proposal, select the Edit Proposal icon . The proposal form will display allowing you to see the full proposal on the left and Proposal Toolbox on the right. The default view for the Proposal Toolbox will be the Discussion tab , where you will see the User Tracking and any comments.
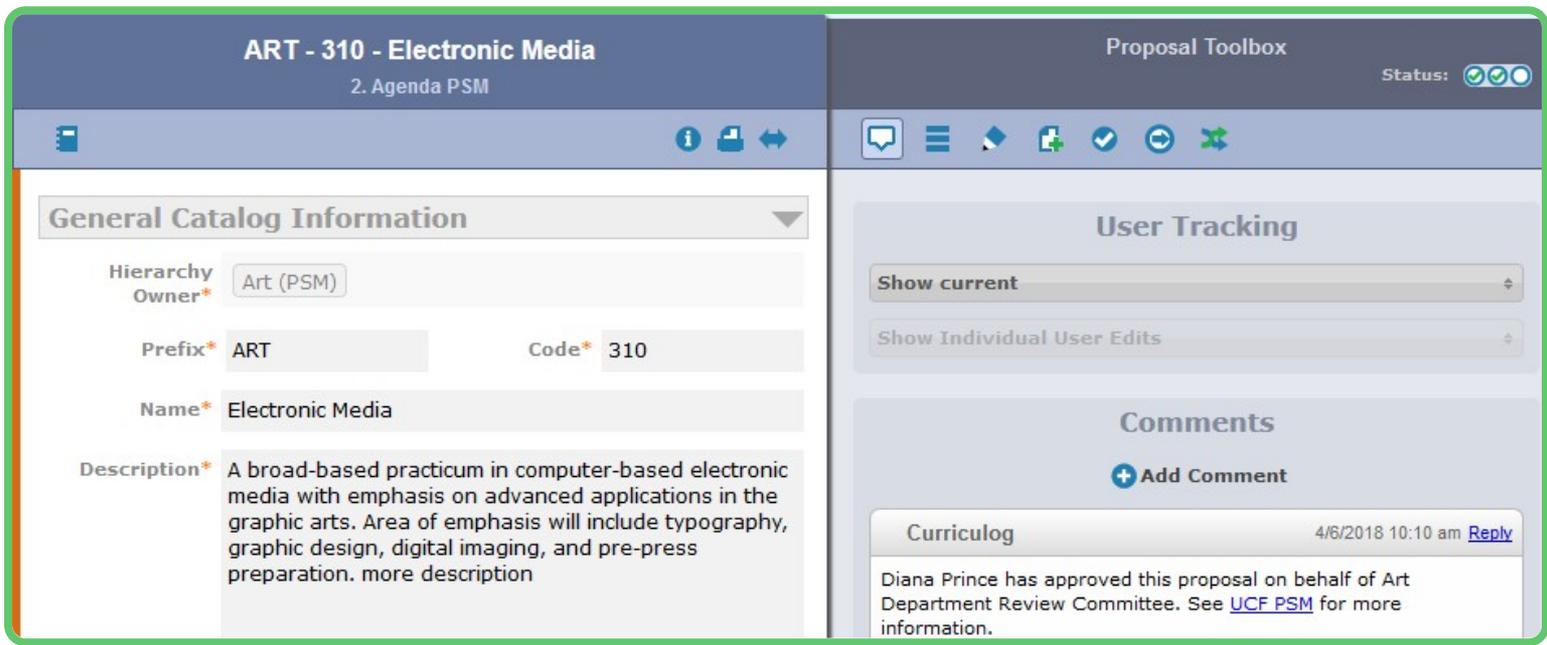
You may view the status of each step within the proposal by hovering over the Status icons in the upper right of the Proposal Toolbox. Each circle indicates a step in the proposal.

Hovering over a circle indicates the name of the step and the decision made on that step.
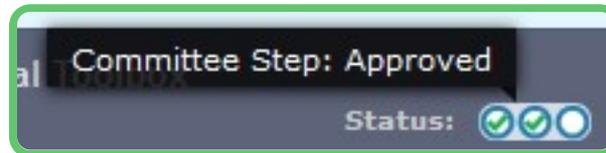

To review changes to the form of the proposal, you can review the User Tracking. The default view will be 'Show Current', which will be the current version of the proposal with all modifications. You can use the drop-down menu just under the "User Tracking" heading, and you'll find the options for "Show original" and "Show current with markup."
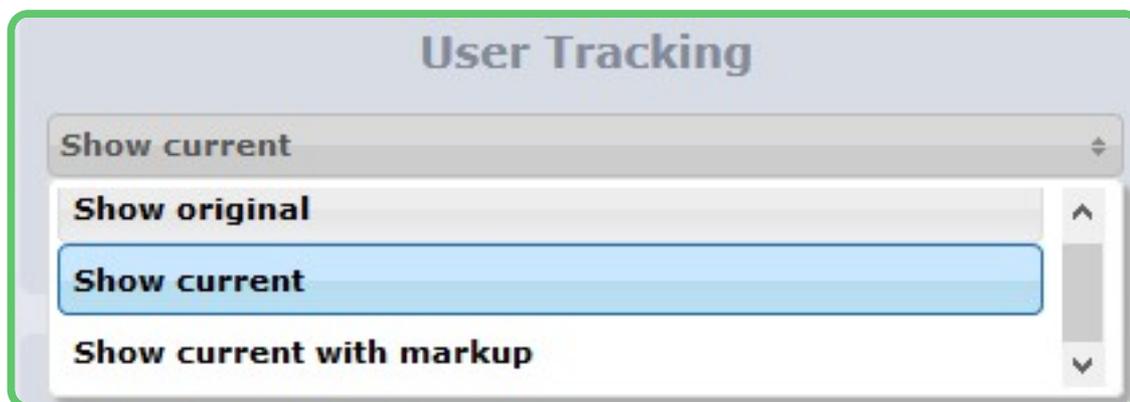

If you select "Show Original", you will see the proposal in the state it was at launch as the originator submitted it.

If you select "Show current with Markup", you will see the original proposal with the changes layered over it and highlighted in different colors to indicate each user who made the changes. If you hover over the changes, you'll see a time and date stamp as well as the user's name.
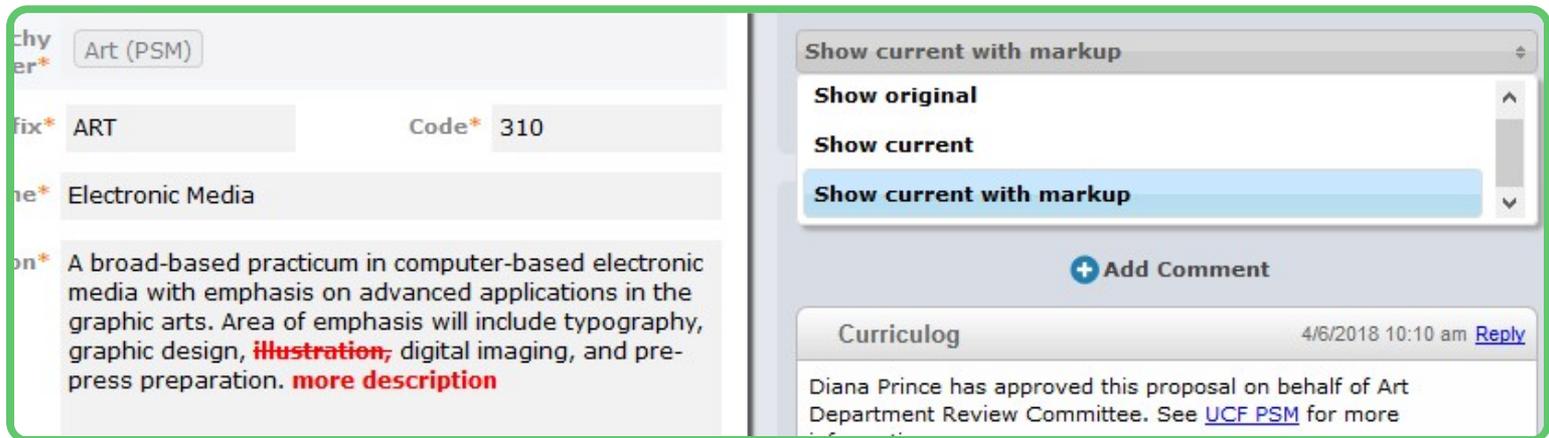
The second drop-down menu allows you to select which users edits you would like to see. The default will be to show all edits by all users – but if you select the menu, you can choose on a step by step basis, to remove a user at any time to see the proposal before and after their edits were added.
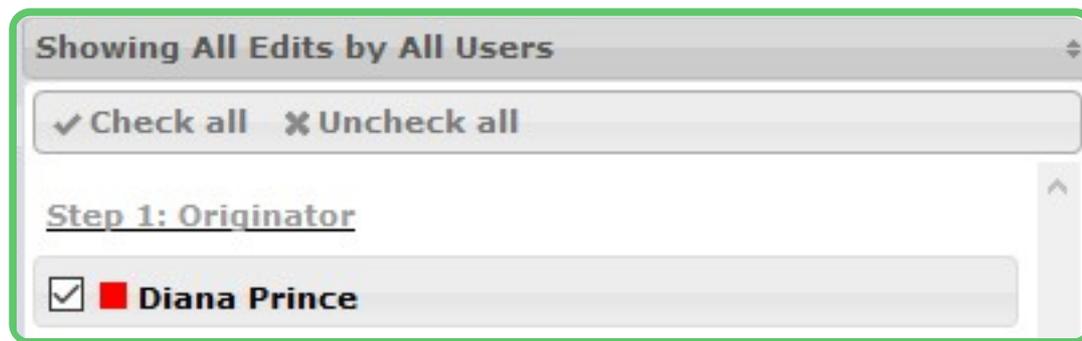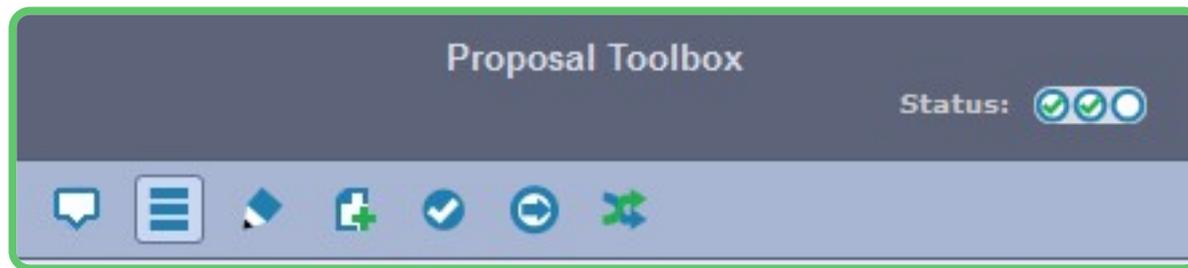

Comments will appear below the user tracking, although your ability to see them will vary based on the transparency set by the administrator. If the permissions on the current step allow for it, you may reply to any existing comments or add new ones using the available links.

Depending upon how a step has been set up, you may edit the proposal, provide comments, or function as an Agenda Administrator.

To review step options and see permission levels, select the Status icon ≡ from the Proposal Toolbox, and click on the ⓘ 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:
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> Only an administrator can modify these settings.

Knowing what permissions you have on your step will make your work within Curriculog easier. For example, 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.

Printing Proposals   **Proposal Fields**

You may also choose to print your proposal at any time by selecting the Print Friendly icon 🖨 from the upper right corner of the form. When you choose to print the proposal, you will be presented with a print friendly version of the form. If you would like to include more details, you can select "Print Options" and use the checkboxes to select the information you would like to include in your printed version.

You may also choose to expand the form into a full screen view, by selecting the Toggle Full-Width Form icon ↔. This can be toggled on or off at any time.