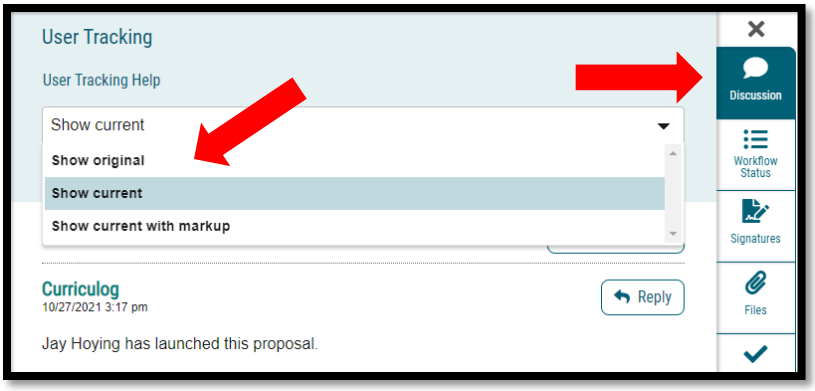
Navigating the Proposal "Toolbox"

The Toolbox

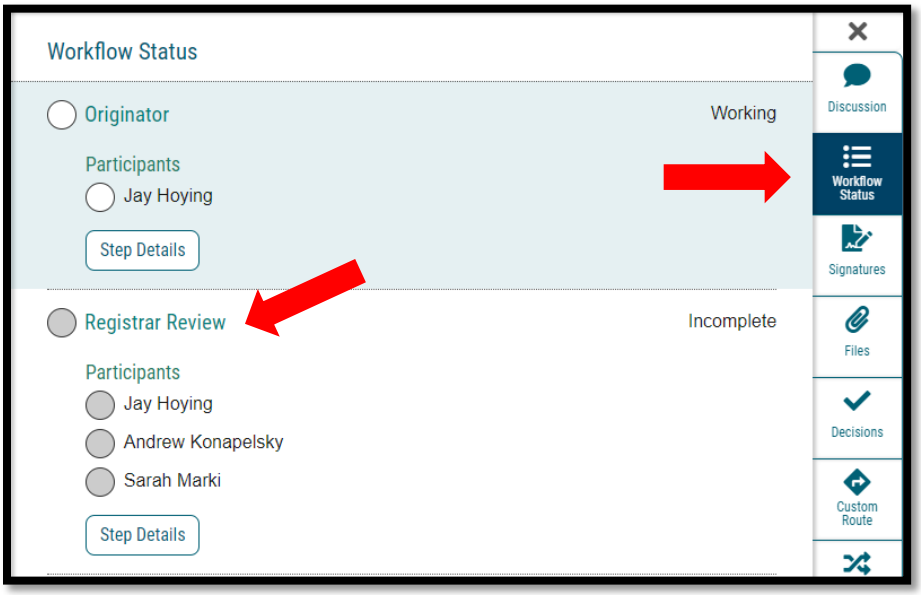
The toolbox includes discussion, workflow status, signatures, files, decisions, custom route, cross listings, and proposal lookup. This is made available upon selection of a launched proposal or on a limited basis when creating a proposal. It is utilized upon creation of a proposal and when review a proposal.

The toolbox is located on the right side the proposal form.

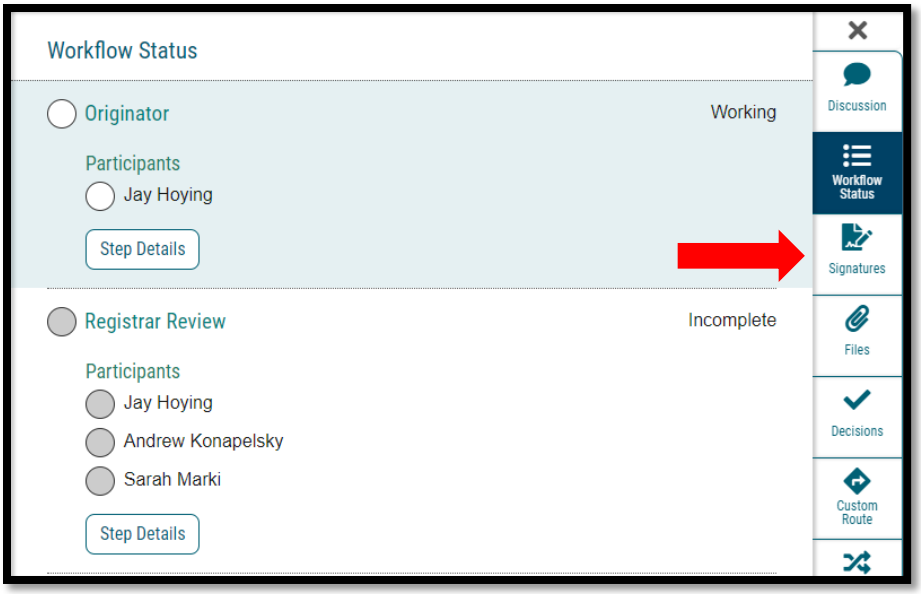
1. *Discussion*: The Discussion tab is the default view of the Proposal Toolbox that you will see when first accessing a proposal. It is used to display the User Tracking information, as well as any comments that have been entered on the proposal.
    a. User tracking information provides mark up details regarding the edits made to the course or program proposed. As well, it provides a listed of actions and comments made thus far in the workflow.



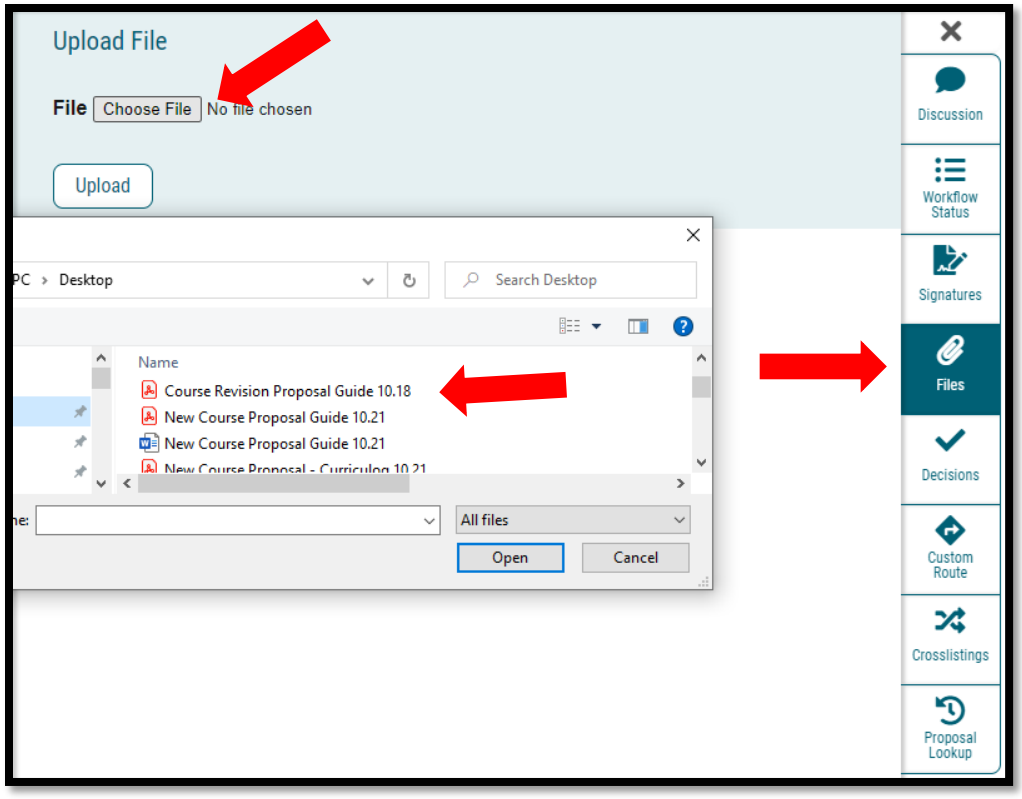
2. *Workflow Status*: The status tab will allow you to review the Proposal History – a log of all of the steps that have already occurred, the step it is currently on, and any steps that still need to happen. On each step you'll find the name of it at the top along with the status – for example, this 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 Step Details.



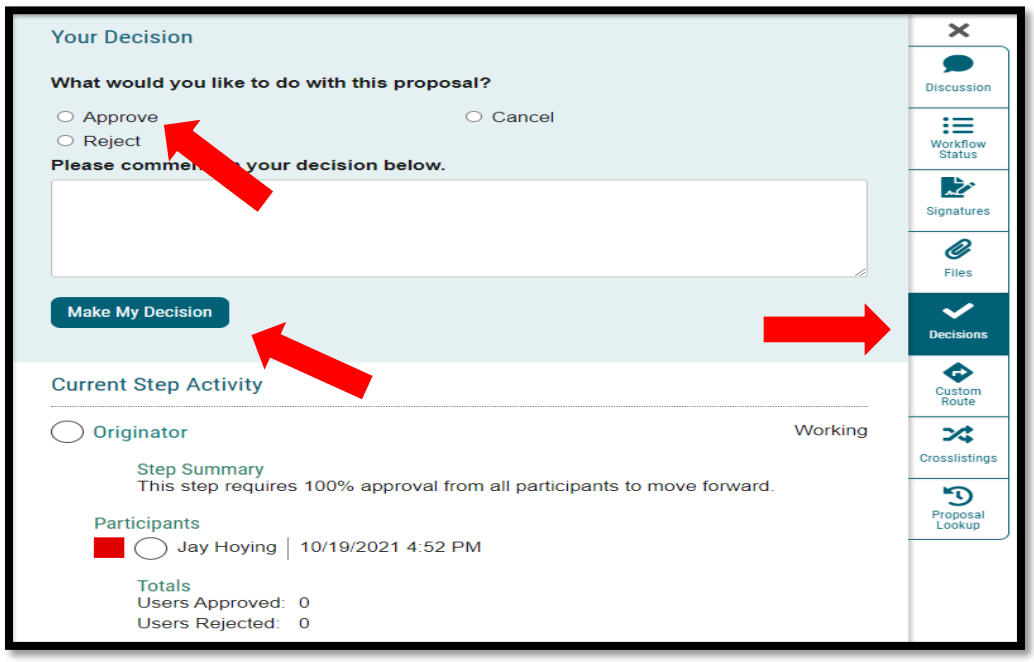
3. *Signatures* – If the administrator chooses to require a signature, they will be recorded on the signature tab when a user makes a decision on a proposal.



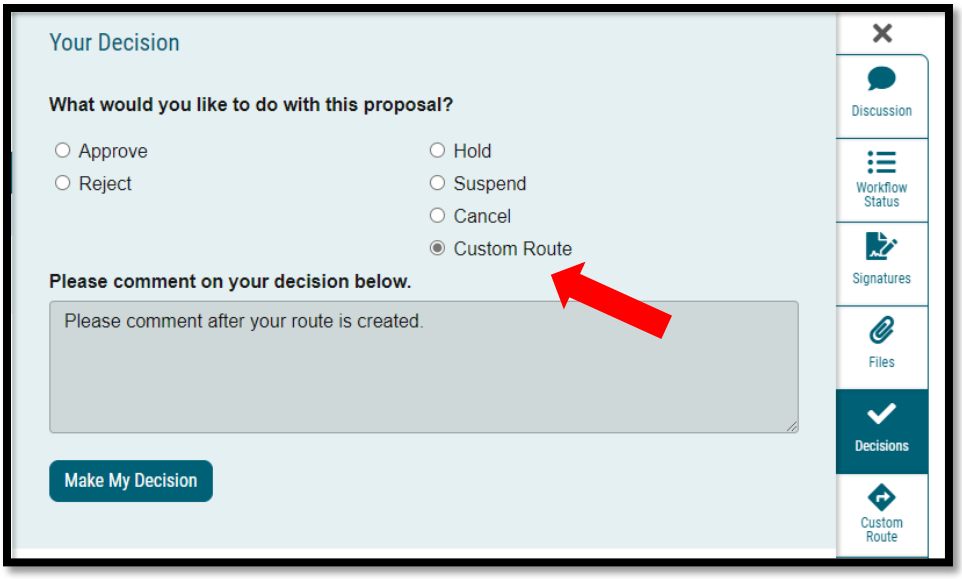
4. *Files* - The Files tab will allow you to attach documentation relevant to your proposals. Any user who is an active participant on a step may upload files to a proposal, and although the maximum file size limit is 20 MB for each file – there is no limit to the number of files that may be attached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



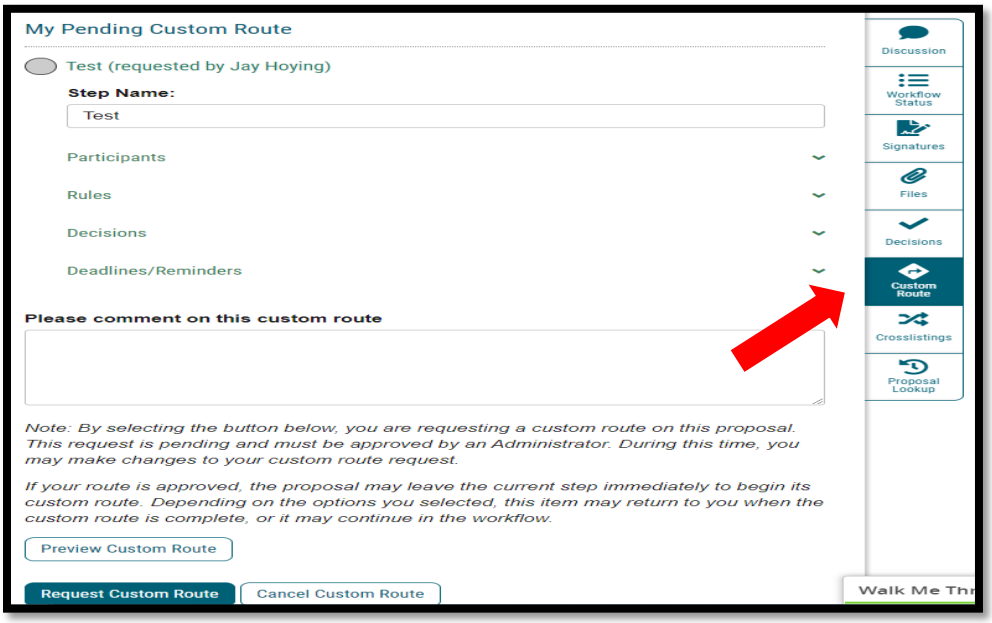
5. *Decisions* – Once you have completed your review and work on the proposal, you will need to enter a decision. To provide a decision, you would select the Decisions tab. The decisions that are available to you will vary based on the settings the administrator has selected for each step.



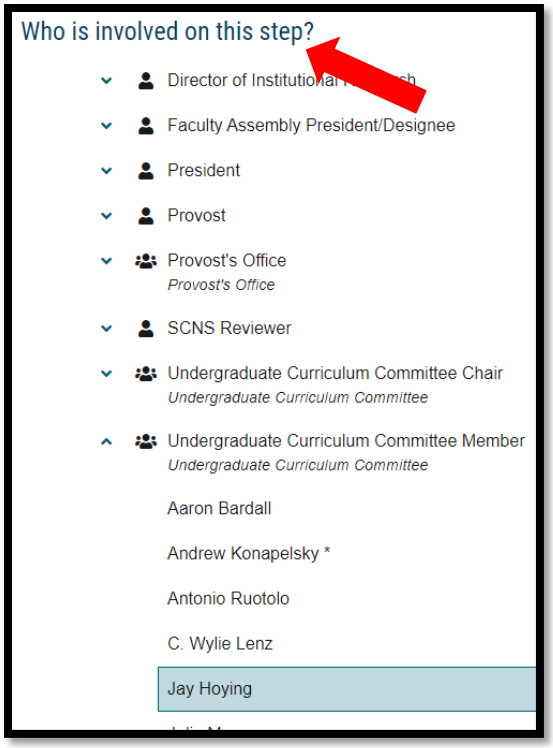
a. Approve - Selecting Approve is indicating that you are approving the proposal in its current state and are signing off on it to move to the next step in its workflow. If you are the only participant on the step, the proposal will advance automatically. If you are not the only participate the proposal will not advance until the decision requirements are met by all participants. Entering a comment is optional when selecting Approve.
b. 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, reverted back to the originator or to the previous step.
c. 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.
d. *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.
e. *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.
f. *Custom Route* - Is an additional ad hoc step outside the steps in the approval process that the administrator originally provided and require administrator approval. This will allow you to invite additional users or committees into a workflow for additional feedback.
    i. To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab, and then select "Make My Decision."



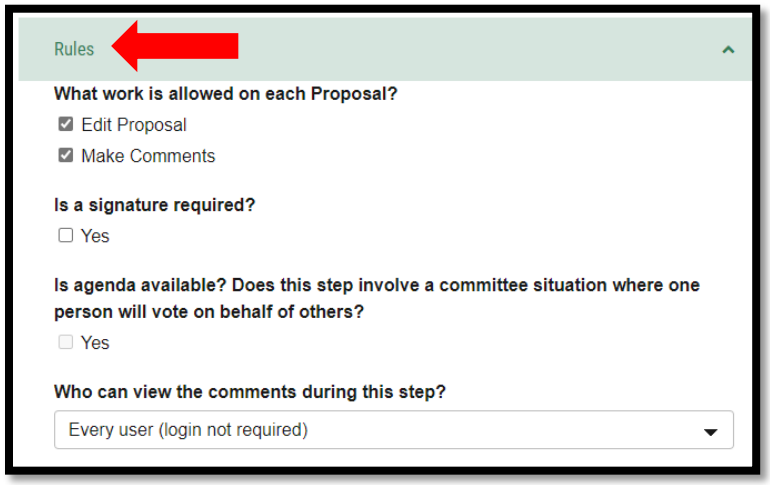
ii. This will direct you to the Custom Route tab to configure the options for your Custom Route.



iii. Indicate who you would like to bring into the workflow by choosing the participants. This will launch a new window titled “Who is involved on this step?” and will display two options initially – Role Types and Hierarchy. Select either to locate an individual(s) by selecting the drop-down symbol and select the appropriate user for the new route.



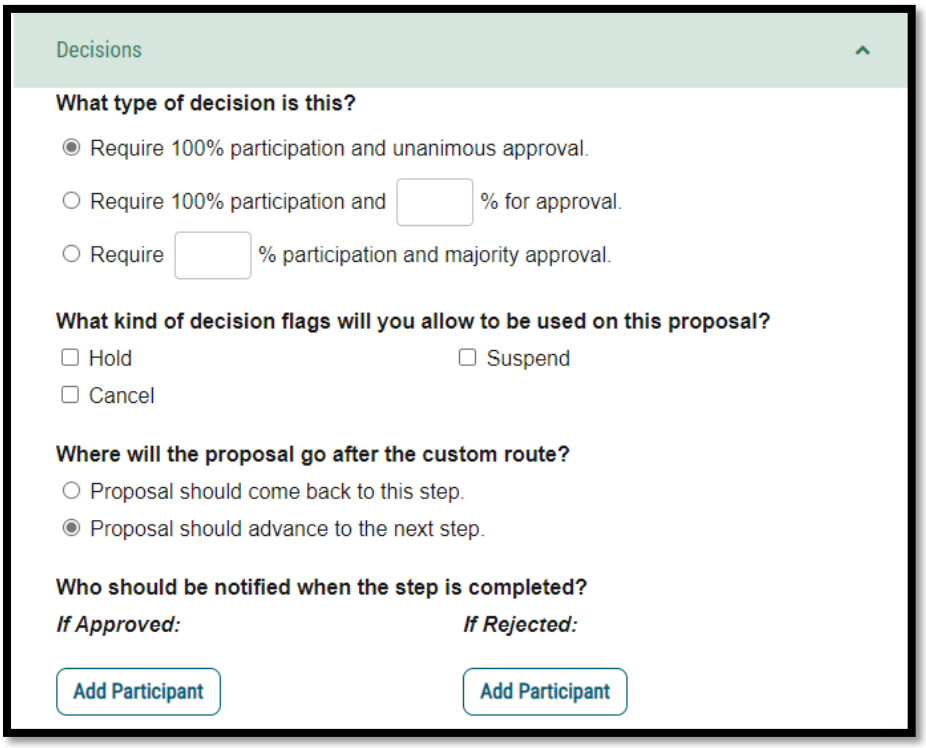
iv. Determine what they will be allowed to do by setting the Rules. To view the options available under Rules, click the arrow to the left to expand the section.
   i. Select if the participants can edit or comment.
   ii. Select if you will require a signature.
   iii. Select if others may view the comments made by the step.



iv. The Decisions section is where you will determine the types of decisions users can provide, and the direction the proposal will move in.

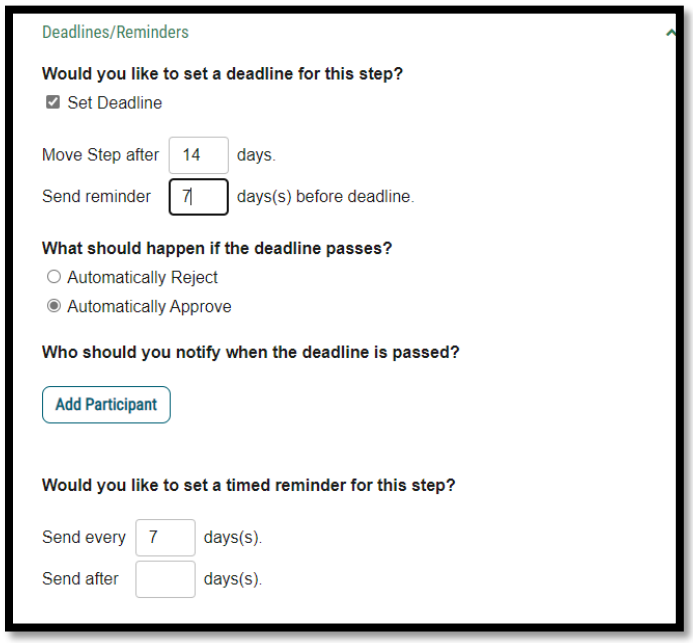
v. Approve / Reject 100% for approval – This option indicates that all users on the step must come to a unanimous decision for the step to be approved or rejected.
vi. Vote: ___ % for approval – This option indicates that a threshold must be reached for the step to advanced, however it still requires that all users on the step provide a decision.
vii. Quorum Vote: Require ___ % participation – This option indicates that a threshold must be reached for the step to advanced, however it does not require that all users on the step provide a decision.

b. The next option determines the path the proposal will take once the Custom Route has been approved. There are two options available and the path you choose will vary based on your needs for the Custom Route.
   i. *Proposal should come back to this step* - This option is often chosen when the reason for a Custom Route is to invite a feedback loop.
   ii. *Proposal should advance to the next step* - This option is often selected when you are inviting a user into the workflow to make additional changes or comments and allow the workflow to progress after with no additional revisions on your part.

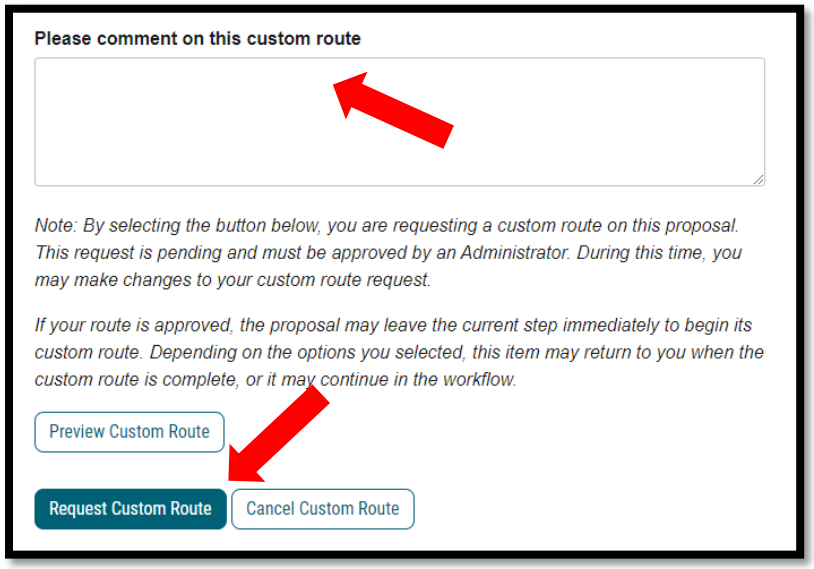


iii. The last option on the Decisions tab is an additional notification that you can choose to provide, if the proposal is either approved or rejected.

iv. Determine if a deadline is necessary and when reminder messages will be sent.



v. After selecting all the options associated with your Custom Route, you will be required to enter a comment. The comment is usually used to provide explanation to the user being invited and requires a minimum of two characters to be entered.



vi. This completes the custom route and the proposal will move through the new workflow route.

g. *Crosslistings* - Are a way to tie course proposals together based on information they share across one or more fields – for example, when two courses may share the same code, name, description and credits but are housed within two different departments and so have a different hierarchy and prefix. The administrator will determine when the crosslisting functionality will be available, and it will only be available within course approval processes.
    i. To create a proposal with a crosslisting, you will begin just like any other proposal.
    ii. The initial form that is being filled out will be referred to as the primary; and all crosslistings created within this proposal will be based on the information provided within this primary proposal. Once all the fields have been filled out, before launching the proposal, you can select the crosslistings icon from the Proposal Toolbox and select "Add Crosslisting."
    iii. Once you have selected Add Crosslisting, the second proposal will appear listed below the primary with the crosslisting icon and the additional text of (crosslisting) added to the title. You can add multiple crosslistings to this proposal by selecting "Add Crosslisting" as needed.
    iv. To remove any crosslisting from the list, select the blue delete icon. To edit any crosslisted proposal, click the name of the proposal. When editing a crosslisting proposal, you will find that some fields are greyed out and already contain content. These fields are prepopulated with information from the primary proposal and you will not be able to modify the contents of those fields within the crosslisting.

6. *Proposal Lookup* – This selection allows you to look up other established proposals for reference.