

# 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. There are four tabs across the top that can be used to help narrow your selection – All Processes, Courses, Programs, and Others.

 + New Proposal

- **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.

You can also use the "Sort by" drop-down menu to sort processes by either title or type to help select. Processes featuring the 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**
- **Changes**

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.

**Name\***

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.

## Could Not Launch Proposal

Please correct the following errors before launching the proposal.

Proposal has validation errors

Ok

Show Me

Once all the required fields have been filled in, the proposal will be able to launch. As the Originator, you now have an additional opportunity to further revise your proposal before sending it on to the next step in the workflow. You may choose to review the section on Editing a Proposal, or move on to Providing a Decision.

When selecting an Approval Process, if this icon  is present, then the Import Required function has been enabled. This means you will have to search for the course or program you wish to modify before starting the proposal.

Prefix

Code

Name

Source  
Curriculog Training Catalog

Exclude previously Imported results

Search

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:** For programs, the first step will be to indicate this is a program in the Curriculog Type field.

This must be declared before choosing the import icon .

- Program
- Shared Core

Always select "Program".

Start by selecting the import icon  from the upper left corner of the proposal. This will open a pop-up window listing the draft catalog to import from.

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 cannot 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, 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.

Complete any remaining required fields and launch your proposal by selecting the launch icon  from the upper left corner of the Proposal.

Once the proposal has been launched, it will move to the first step in the process. As the Originator, you will have an additional opportunity to further revise your proposal before sending it on to the next step in the workflow. You may choose to review the section on Editing a Proposal or move on to Providing a Decision.