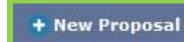




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New Proposals

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.



Hierarchy Owner* Select an option
Hierarchy Owner is required.

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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 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.

Program Type* Program
 Shared Core

Import Data Into Your Proposal

Select an external system from which you would like to import courses.

Acatalog: Curriculog Training Catalog

[Cancel Import](#)

Search Curriculog Training Catalog

Using the faceted search below, locate the course or program you would like to import into this proposal.

Filter Courses

Prefix = ACC* [X](#)

Add another filter [Filter by field](#)

Start Date: End Date: Sort Results By: [Prefix X](#) [Code X](#) [Name X](#)

Exclude previously imported items

[Search Available Curriculum](#) [Select Another External System](#) [Cancel Import](#)

Search Results (1 to 17 of 17)

ACCT 221 Principles of Accounting I

ACCT 222 Principles of Accounting II

ACCT 315 Managerial Accounting

ACCT 321 Intermediate Accounting I



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](#).

ACCT 322 Intermediate Accounting II (previously imported)
ACCT 326 Microcomputer Applications in Accounting

Import Data Into Your Proposal

Confirm the fields that will be imported into your proposal (only fields that are mapped will be listed here). If you would like to prevent the imported data from overwriting an existing field in your proposal, click “Import Field” to uncheck that field.

Once you click Import, your data will be validated against the proposal. Any data that is incorrect will have a message telling you what is wrong with the data, and it will not be imported into the form to prevent errors.

Field Name	Data Preview	Import Field
» Data Points: Hierarchy Owner	Agricultural Sciences	<input checked="" type="checkbox"/>
» Data Points: Name	Wildlife Management I	<input checked="" type="checkbox"/>
» Data Points: Prefix	AG	<input checked="" type="checkbox"/>
» Data Points: Code	335	<input checked="" type="checkbox"/>
» Data Points: Description	Introduction to wildlife management. Principal wild birds and animals of economic importance to Florida farms. Methods and techniques of population manipulation.	<input checked="" type="checkbox"/>
» Data Points: When Offered	[no data]	<input type="checkbox"/>
» Data Points: Course OID	156952	<input checked="" type="checkbox"/>

[Import This Item](#) [Return to Search](#) [Select Another External System](#) [Cancel Import](#)