# USER DASHBOARD

Selecting the Proposals Module from the top navigational menu will populate the left pane with options relevant to managing proposals.

From the Proposal Module in the top navigation, you will now have access to the My Tasks, My Proposals, Watch List, and All Proposals tabs.

- My Tasks - lists all proposals in which you are an active participant and awaiting action from you.
- My Proposals - lists all proposals you have created, whether they have been launched or not.
- Watch List - lists all proposals you have selected to watch. You may or may not have editing permissions or decision-making abilities on an item you are watching, as you can watch any proposal in progress. You may choose to stop watching a proposal at any time.
- All Proposals - lists all proposals in Curriculog and provides the Advanced Filter.

Below these tabs is the *New Proposal link*. Selecting *New Proposal* will open the workflow to create a new proposal.
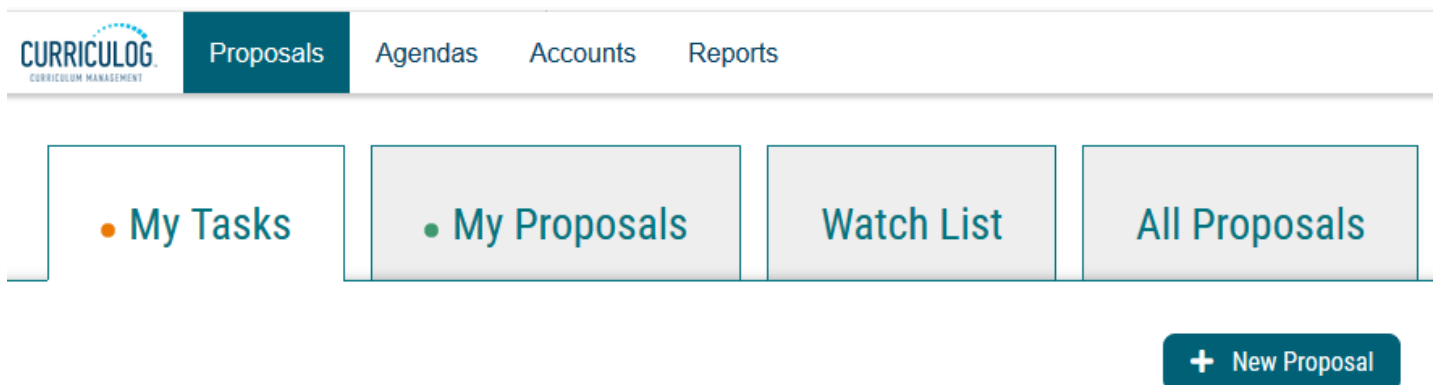
There are various icons and colors associated with the proposals.

The thin colored bar that appears to the left of the proposal will change based on the relationship with the user.

- Blue - No action currently required as you are not an active participant on this proposal at the current step.

- Green - You are the originator of this proposal, but you are not an active participant on the current step and no action is currently required.

- Orange - You are an active participant on the current step and action is required from you.

USER DASHBOARD

ART - 212 - Color Theory and Design
1. 2021-2022 Course Revision (MS)

Last Activity: Feb 24, 2020 4:29 PM by Mara Sansolo

Biological Sciences B.A.
1. 2021-2022 Program Modification (MS)

Last Activity: Apr 29, 2020 2:41 PM by Mara Sansolo

CFD - 135 - Principles of Family Development
zz2020-2021 DigarcU - Course Modification Form (HK)

Last Activity: Mar 4, 2020 2:17 PM by Margaret Bancroft

There are numerous other icons that may be associated with proposals as well, which will be outlined below.

Urgent - Indicates a task is now considered "Urgent". An item will be considered urgent once the urgency threshold has been met, which is set by an administrator. After the indicated number of days has passed, a notification will be triggered to prompt you to make a decision on the proposal. When an item is considered "Urgent," it will be marked in your task list by this orange icon. Unlike a deadline, the urgency threshold does not trigger any automatic actions on a proposal.

View Summary - Will create a flyout on the right pane displaying information relevant to the proposal. The same flyout will appear by clicking anywhere within the proposal's row in addition to the icon. The fields that appear in the Process Fields section will be determined by your administrator.

Edit Proposal – Available only if you are an active participant on the current step. Directs you to the proposal, where you may make modifications and enter your decision on this proposal depending upon your permissions.

Send message about Proposal – Allows you to send a message to another Curriculog user. The e-mail will be pre-populated with a link to the proposal you were reviewing, and will allow you to include one or more users, as well as a copy to yourself. Curriculog does not store a copy of any e-mail.

Watch Proposal - Allows you to keep track of a proposal in progress by listing under the Watch List tab, even if you are not a participant on any step.

Done Watching Proposal - Allows you to stop tracking the proposal and removes it from your Watchlist.

USER DASHBOARD

DECISIONS

◯   My current decision - This icon will change based on what decision you have made on the proposal. The empty circle shown to the left indicates that no decision has been entered. The additional decision options are as follows:

Approved – This indicates that your decision was to approve the current step. If you were the only decision needed on this step, it would advance in the workflow. If there are others involved in this step, it will wait until all needed decisions are received before advancing.

Rejected – This indicates that your decision was to reject the current step. If you were the only decision on this step, the step will follow the rejection route laid out by the administrator: either it will return to the previous step, or it will return to the originator for further revisions. If there are others involved on this step, it will wait until all needed decisions are received before proceedingalong the rejection route.

Held – This indicates that your decision was to request that the administrator place the proposal on hold, and the administrator has approved it. Now that the proposal is on a status of "hold", you may continue to work on the proposal without worry that the deadline will automatically advance it to the next step. The proposal will stay on hold until the administrator manually lifts the hold status.

Suspended – This indicates that your decision was to request that the administrator place the proposal on suspend, and the administrator has approved it. Now that the proposal is on a status of "suspend", the proposal will be removed from the workflow and nobody will be able to work on it. The proposal will stay on suspend until the administrator manually lifts the suspended status.

Cancelled – This indicates that your decision was to request that the administrator allow you to cancel the proposal and potentially delete it. This may be due to a proposal being created in error – such as the incorrect approval process being selected. Once the administrator has approved it, you may choose to delete the proposal. This is the only way you can delete a proposal after it has been launched.

Multiple Decisions – This icon is used to indicate that you have multiple decisions on this step – such as when a step has several committees voting on it, and you are a member of more than one of those committees, therefore providing multiple decisions.

Delete a Proposal - Deleting a proposal will permanently remove it from Curriculog and should be considered a permanent action that cannot be undone. Proposals cannot be deleted after they have been launched unless they have been canceled by an administrator. The delete icon is always available for unlaunched proposals. If the proposal has been launched, you may be able to cancel it by selecting it as a decision if the administrator has provided it as an option - or by contacting your administrator.

Step Restart – This symbol indicates that a step was restarted. A restart commonly occurs when the users involved in the step are replaced with another user.