Hagerstown Community College

Curriculum™ Software End User Manual

2024-2025

Contents

Curriculum™ Software

Curriculum™ is Hagerstown Community College's online Curriculum Management System that automates the process of course and program approvals through electronic workflows. The online system allows faculty and directors to create, modify, inactivate, and reactivate programs and courses for the upcoming College catalog.

Log In

To view, act upon proposals, leave comments, or provide decisions - you must have a user account and login. To login, navigate to the upper right corner of the screen, select "*Login*". The login page is available to anyone who accesses the Curriculum™ website, however, only individuals with Hagerstown Community College (HCC) credentials can login. If you have trouble logging in with your HCC login credentials, please contact the HCC IT help desk at hccit@hagerstowncc.edu or (240)-500-2457.

Help

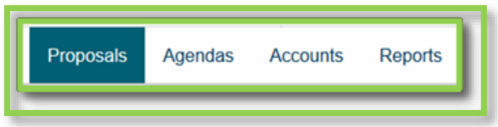
In the event you need assistance, Curriculum™ has a built-in help available in the bottom right corner named Walk Me Through. This feature will step-by-step walk you through areas of Curriculum™ and proposals. However, if you need additional help, you can reach out to your system administration/Coordinator of Curriculum & Academic Systems (CCAS) with any questions:

Chelsea Brereton
Coordinator of Curriculum & Academic Systems
(240)-500-2283
cebrereton@hagerstowncc.edu

My Account

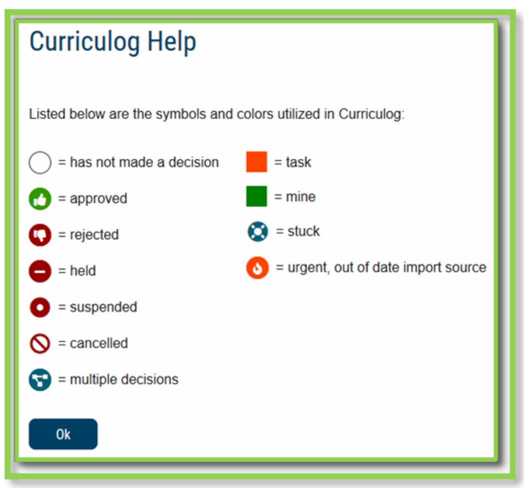
<u>My Dashboard</u>

Once you have logged into Curriculum™, the first screen you will see is "*My Dashboard*." This dashboard will serve as your gateway to Curriculum™ and allow you to manage your proposals and see recent notifications and upcoming events at a glance. Across the top of the page you will find a consistent toolbar, from which you may access the Proposals, Agendas, Accounts, and Reports Modules.



In the upper right corner, there are options for your own user account listed below the drop-down menu, giving you options for *My Settings* and *Logout*.

Following your name are "Help"  and "Search"  icons. If you select "Help," a window featuring symbols and colors utilized in Curriculum™ will display.



The search function may be used to locate proposals based on their titles or users throughout the system. **Note:** *For more effective searching, we recommend using the Advanced Filter within the All Proposals tab.*

My Recent Notifications

You will receive notifications for a variety of reasons, such as a proposal receiving a decision, an edit being made, or a comment being provided. Notifications will be e-mailed to you based on your e-mail settings under *My Settings*.

The *My Recent Notifications* section of the Dashboard will show you the five most recent notifications. If additional actions are required, there may be a link provided within that notification. To scroll through more options, select the arrow in the upper right corner to scroll through them.

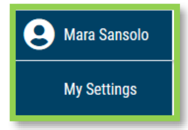
My Upcoming Events

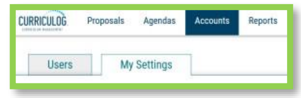
My Upcoming Events will list the next five upcoming items. Events may include deadlines within your proposals,or events that the administrator has placed on the calendar. Events relating to your deadlines will be visible to you only; events placed by administrators will be visible to all users. To view the full calendar, select the calendar icon in the upper right corner. **Note:** *Only an administrator can add events to the calendar.*

Selecting one of the upcoming events will expand and show additional details. The calendar included within Curriculum™ is built to manage deadlines and track timeframes within the system. It will not export or import information, and it will not sync with any external calendar application.

My Settings

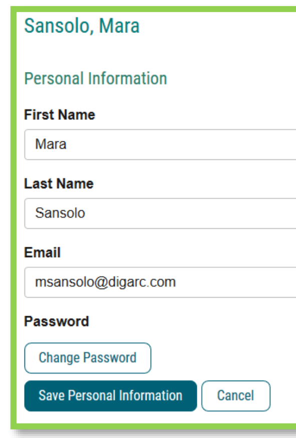
My Settings will allow you to review the settings for your own account. You can access this information in two ways: you can either hover over your name in the upper right corner of Curriculum™ and choose “My Settings” from the drop-down, or you can navigate to the Accounts module and choose the “My Settings” tab.





This tab will populate only your user account in the left pane, and when you select it, you will see your information appear in the flyout on the right.

The first portion, Personal Information, will contain your first and last name, e-mail address, and password information. You will be able to change any of this information on your own account at any time. If you make any changes, click “Save Personal Information.” **Note:** *You must ensure that any changes you make match your on-campus provider credentials.*



The next section will detail the roles that have been assigned to you. Roles are listed first, and any committees you may serve on will be listed after. You will not be able to modify any of the roles that have been assigned to you.

The last section will be *User Rights* and will indicate some permissions you will have within the system as well as notification and signature preferences.

The first portion will be labeled “Permissions” and will be set by the administrator

- **Can Originate Proposals** - This setting indicates that you will be able to act as an originator and create new proposals.
- **Can Import** - This setting allows you to import content when creating a new proposal.
- **System Administrator** - This setting indicates whether you are a System Administrator. System Administrators have the highest level of authority across the Curriculum™ system and cannot be restricted in any way.

The next three options will pertain to references regarding notifications:

- **Originator** This setting controls how often you will receive notifications for proposals you have created.
    - *Get all messages for User's proposals* – You will receive notifications for all actions taken on proposals you originate.
    - *Get messages for comments only for User's proposals* – You will receive notifications when there has been a comment on a proposal you originated.
    - *Get messages for comments and edits only for User's proposals* – Users will receive notifications when there have comments or edits on a proposal they originated.
- **Email Options** Determines how often emails from Curriculum^{TM} will be sent. Choosing the "All Emails" option will send an email to you each time a notification is triggered. The other options will send a digest of all notifications that occurred since the last email; and digest emails are sent out each night at midnight. As a best practice, we recommend using the digest option because Curriculum^{TM} generates a lot of notifications that could quickly fill a user's inbox if "All Emails" is chosen. **Note***: All notifications will still appear on the User and Admin dashboards as they are triggered even if a different digest option has been chosen for the emails.*
- **Process** Determines how often you will be included in notifications for proposals that you are a part of on at least one step.
    - *Send messages for the steps in which I am involved only* – be notified only for steps that you are directly a part of.
    - *Send messages for proposals in which I am involved only* – be notified for actions on all proposals you are involved in, even if you're not involved on the current step.

The last option indicate the preference for how the signature pin will be provided should it be required on a step, and a way for you to view your provided pin.

- **Use Electronic PINS for signature steps** – Signature Pins are used on signature steps to confirm a user's decision. Pins are unique to a participant. Each user will be able to view and assign their own signature pin by navigating to My Settings.

User Accounts

The *Accounts* tab will display a list of all users within Curriculum™. You can sort results by Name, Role Type, or Entity using the drop-down menu in the upper left:

- **Name** - Sorts users alphabetically by last name
- **Role Type** - Sorts users based on the role types that have been assigned to them by the administrator. For example, department chair.
- **Entity** - Sorts users based on the hierarchy entities in which their roles fall. For example, selecting a division.

You can also use the alphabet links to filter the list of users displayed. Selecting a letter will jump to the first section of users whose last name begins with that letter. Users will be displayed ten at a time on the page, and you can use the “Next 10” or “Previous 10” options at the bottom of the page to scroll through them.

When hovering over a user, a Send Message icon will appear to the far-right end of that row and indicates that you may send a message to that user. When you select the icon, a flyout will appear in the right pane with the user’s name populated in the “To” field.

You may choose more than one user to send a message to at a time. The “From” e-mail will be auto-generated by the system and cannot be modified. You can provide any subject or message, and if you would like a copy of the e-mail to be sent to you – be sure to click the checkbox for “Copy me on this email” at the bottom before clicking “Send Message.” When the e-mail is sent a copy will not be maintained within Curriculum™.

When you select a user’s name from the list, the flyout on the right will display the user’s personal information including their first and last name and e-mail address, and any roles or committees that have been assigned to them by the administrator. You will not be able to modify another user’s account in any way unless you are an administrator.

Reports

Global Reports

- **Pending Proposals Report** - provides a list of all proposals within the system sorted by status.
- **User Activity Report** - provides a detailed view of a single user's participation within Curriculum^{TM} by proposal, including comments, edits, decisions and time spent.
- **Aging Report** - provides a list of all active proposals sorted by the greatest time in the system.
- **Bottleneck Report** - provides a list of the largest lag times for changes by user, role and entity (such as department).
- **Participation Report** - provides a list of all steps that involve a selected participant and will include the proposal name, decision made (if any), proposal URL, and the committee/entity those proposals belong to.

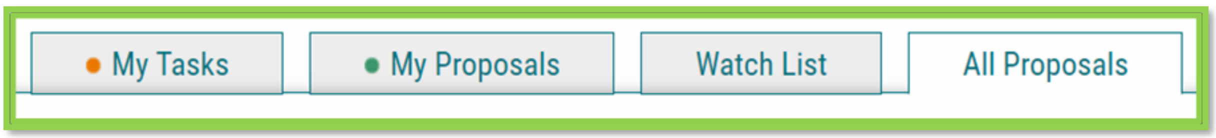
Detail Reports

- **Proposal Detail Report** - provides the complete details of a single proposal, with the ability to include a summary of user activities (edits, comments, decisions, time), comments, import source, and files.
- **Proposal Progress Report** - provides the history of a proposal (its steps) in a flow diagram with user activity including comments, edits, time and decisions.
- **Impact Report** - provides all dependent elements of the curriculum for an item, such as prerequisites, corequisites, and programs. This will look for any reference of the course – whether it is a permalink, dynamically linked into a program, or plain text within the description. **Note:** *Results of the Impact Report may look surprising in how thorough they are. For example, a search for a course may provide a program in the results – even though the course does not appear to be listed in the programs description or dynamically linked at first glance, because it is listed as a prerequisite to one of the dynamically linked courses within the program!*
- **Historical Change Report** - provides the change log of all proposal versions of a curriculum item over time.

Proposals

A proposal is a form that follows a workflow to receive an approval. Proposals are used to create or make changes to courses and/or programs. Administrators will create an Approval Process, which you will select to act as the template to base your proposal on. 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 Proposal tabs:

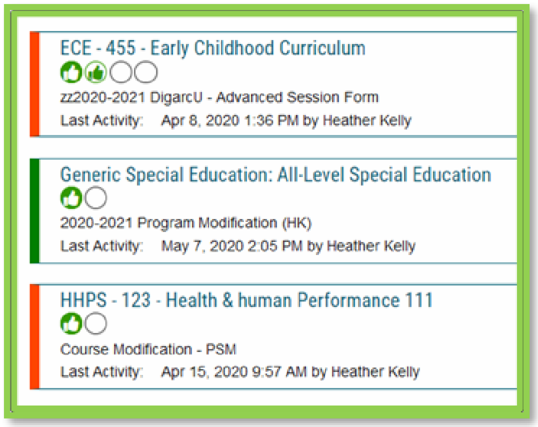


- **My Tasks** - lists all proposals in which you are an active participant and awaiting action from you.
- **My Proposals** - lists all proposals you have created, whether they have been launched or not.
- **Watch List** - lists all proposals you have selected to watch. You may or may not have editing 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 Curriculum^{TM} 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.

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 on 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 an action is required from you.



There are also numerous icons that may be associated with proposals as well:

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.

Send message about Proposal – Allows you to send an e-mail to another Curriculum™ 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. Curriculum™ 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 Watch List.

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 on 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 proceeding along 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.

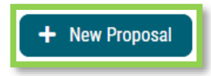
Multiple Decisions – This icon is used to indicate that you have multiple decisions on this step – such as when a step has several committees voting on it, and you are a member of more than one of those committees, therefore providing multiple decisions.

Delete a Proposal - Deleting a proposal will permanently remove it from Curriculum™ 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.

Selecting the Correct Proposal Form

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.

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 determine which form to use, if unsure, faculty or directors can refer to the [Curriculum Development Manual.]

Starting a Proposal

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 an 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. 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.

Importing Data Into the Proposal

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.

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. After selecting to most current catalog, 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 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 "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.

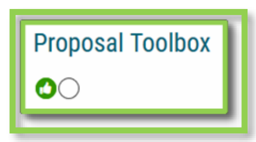
Now that you have imported the existing catalog data; the best practice is that you do **NOT** make changes to the existing information. Complete any remaining required fields and launch your proposal by selecting the launch icon from the upper left corner of the Proposal. This will be critical to ensuring 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 workflow. This is where you will make any edits to the course/program so track changes can record them appropriately.

Editing Proposals

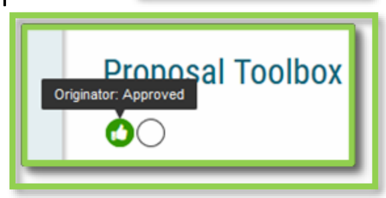
Proposals awaiting a decision from you will be listed in the My Tasks tab of the Proposals Module. This tab will display by default when logging into Curriculum™. When you hover over a proposal, several icons will appear giving you options for interacting with the Proposal. Descriptions of each icon can be found above.

To make a decision or interact with the proposal, click the name of the proposal. 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.

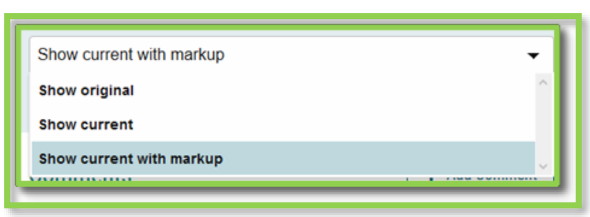


You may view the status of each step within the proposal by hovering over the Status icons in the upper right of the Proposal Toolbox. Each circle indicates a step in the proposal.

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 or provide comments.

To review step options and see permission levels, select the Status icon from the Proposals Toolbox, and click on the Step Details withing 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.

Printing Proposals

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.

Proposal Fields

There are several types of fields within a form that will be filled in to house information about your proposal. If you are entering information into a new proposal - be sure to save your information regularly by using the "Save All Changes" that appears at the top or bottom of the page. If you navigate away from the page without saving, the changes will be lost. If you try to leave the page without saving, you will be prompted to save the page.

When you are ready to launch, fields will be validated to ensure required fields have content. Any required field, which will be indicated by a red asterisk, that is left blank will fail validation – and the proposal will be unable to launch. Fields missing information will be highlighted in yellow, to indicate which ones must be filled in prior to being able to move on to the next step.

If you are making changes to an existing proposal – you will need to save each field as you work by click the save button that appears under each field.

Prospective Curriculum (Programs Only)

Curriculum™ structures programs using a series of cores and sub-cores – matching the format of Catalog so that the two systems can easily communicate with one another and allow for the easy import of data between them.

The Prospective Curriculum field is specific to Program type proposals and is where you will build cores into your program and attach courses. The Curriculum section has two views available: View Curriculum Courses and View Curriculum Schema.

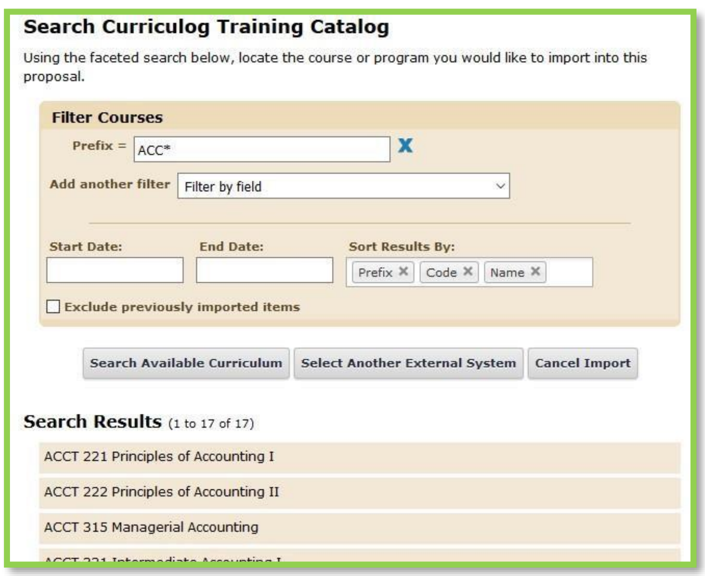
View Curriculum Courses will be the default view, as courses must first be attached under View Curriculum Courses to be available for use within Cores under View Curriculum Schema. You will have the options of importing courses or manually adding them. **Note:** *if the "Import Course" option is not available, you will need to contact an administrator to grant you permission to import.*

If you elect to manually add a course you will need to provide a Prefix, Code and Name for that course. This option should be used sparingly, ideally for courses that may be going through a proposal at the same time and do not yet exist in your external system; especially if that system is Catalog as it may impact the program's ability to import.

The best practice for bringing in new courses to use within your proposal will be to import them. To import a course, select "Import Course". A pop-up window will display featuring Integration Manager, providing a list of any catalogs your administrator has made available to you. Select the most recent catalog you would like 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 by an administrator, the exclude previously imported items flag may be reset.*



When reviewing the search results, you can click on them to add them to the proposal, and they will be added to the “Selected Courses” area at the bottom of the page. Selected courses will be indicated in a darker gold color. When all the courses have been selected, click on “Add Courses to Proposal”.

Once courses are added, they will be listed in the “View Curriculum Courses” section of the proposal. If you would like to remove any, you can hover over them and a blue delete icon will appear will appear clicking it will remove the course from the list. **Note**: *Only the prefix, code, and name of a course will appear within the programs in* Curriculum™*.*

Now that courses have been added, they can be used within cores. To create a core, select “View Curriculum Schema”. From there click “New Core”, a new core will be added within the “View Curriculum Schema” tab with the default title of “New Core.” To modify the core, click on the “New Core” row. The box will expand displaying additional options, including a title and description field.

Replacing the title will update the text in the gray bar. The description field may or may not have a WYSIWYG editor available, depending upon the settings your administrator has selected. **Note:** Remember that Permalinks imported from Acalog into Curriculum™ within Rich Text fields will be maintained, however you will not be able to create or modify them within Curriculum™.

When you select “Add Courses” a dialogue box will display with courses that you may choose from. The courses in this list are populated based on the courses you have previously added on the “View Curriculum Courses” tab – if you do not see a course that you need to add, you will need to return to that tab to add it first before you can add it to your core. When you select a course, it will be highlighted blue. Once you’ve selected all the courses you would like to attach to the core, select “Add Course” and they will be listed under your core.

If the courses are not listed in the order they are preferred, you may drag and drop the courses into the correct order. The courses will save automatically once you release them.

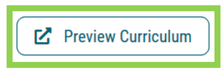
If you wish to remove any courses, hover over them and click on the blue delete icon to remove them. Removing them from the core does not remove them from the “View Curriculum Courses” tab, and you may use the course within other cores in this program.

Custom Text may be used to place text between courses – similar to the way that Ad-hoc text is used within Acalog. Clicking “Add Custom Text” will display a dialogue box where you may enter text, such as “OR”. When you are done entering your text, select “Add Custom Text”. **Note:** *You must add at least one course before you can add Custom Text.*

Once Custom Text has been added, it can be modified by selecting the pencil icon to the right of it – or removed by selecting the blue delete icon. You may also drag the Custom Text up or down throughout the list of courses to place it where you would like. After you’ve finished making changes to a core, you may collapse it by selecting the gray bar displaying the core title.

Selecting icon will enable drag-and-drop functionality to move the core. If you would like to create a sub-core– meaning you would like to have a core appear below and indented under another–you will need to drag the second core down below the desired parent core, then move it in to the right to fall below the desired core. When you release the core, the ordering will save automatically.

The third icon available within the Prospective Curriculum field is the Preview Curriculum icon. You may use the Preview Curriculum icon at any time to preview the Prospective Curriculum field. **Note:** *The Preview Curriculum tab displays ONLY the Prospective Curriculum field – it does not display any other elements of the program proposal or any of the course details beyond prefix, code, and name.*



The preview will open a new window and display the contents of the Prospective Curriculum field with each core expanded. You will be able to see the title and description for each core, as well as the prefix, code, and name for each course that has been attached, and any associated Custom Text. The preview should reflect how your programs are set up in your current Catalog system.

The top right corner of the preview will contain three options – print, Show Curriculum Preview, and Show Curriculum Preview with Markup.

Print will launch your browser's print option to print this screen. Show Curriculum Preview with Markup – provided your administrator has enabled the user tracking – will indicate in green anything that has been added and indicate in red anything that has been removed. It will not specify which user performed which action in this view – you would need to use the "User Tracking" tool to see that level of detail. To return to the preview, you would choose the Show Curriculum Preview icon again or close the window to return to the program to make further modifications.

Proposal Toolbox

The Proposal Toolbox appears on the right-hand side of the screen when working within any proposal and includes several options for interacting with your proposals.

Discussion

The first icon 🗨 indicates the Discussion tab. 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. More details about the User Tracking and comments are listed under the Editing a Proposal section.

Status

The next icon ☰ is for the Status tab. 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. Under Participants you will be able to see any users who were required to take action on this step; if they performed any edits. 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. In the Rules portion, you will be able to see the settings for each step.

Signatures

A signature will be recorded on the signature tab when a user makes a decision on a proposal. A user can set up their signature pin by going to My Settings.

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.

Decisions

Once you have completed your work on the proposal and you are ready for it to move to the next step, you will need to enter a decision. To provide a decision, select the Decisions tab from the Proposal Toolbox. The decisions that are available to you will vary based on the settings your administrator has selected for each step, but this manual will cover all options available:

- **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. Entering a comment is optional when selecting Approve.

- **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 when it has received a rejection.
    - Originator – If the originator chooses to send a proposal back to the originator, the proposal will create a new step titled 'Originator', followed by each step from the beginning. This effectively causes the workflow to start over.
    - Previous Step – If the originator chooses to send a proposal back to the previous step, the proposal will return to the previous step only and then resume the normal workflow.

- **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.

- **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.

- **Cancel** - Submits a request to cancel the proposal and delete it from Curriculum™. 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 Curriculum™. 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.