# Guests

A Guest within Curriculog is anyone who visits the system but does not log in. Guests are unable to make any changes to content, provide comments, or modify proposals.

Guests to the system can potentially enter and view active proposals at any time, based on transparency settings established by the administrator. Guest access for comments may be restricted by step, by proposal, or restricted entirely from the system. When accessing Curriculog as a guest, you may have access to view a summary of a proposal, the full proposal itself, agendas and/or reports.
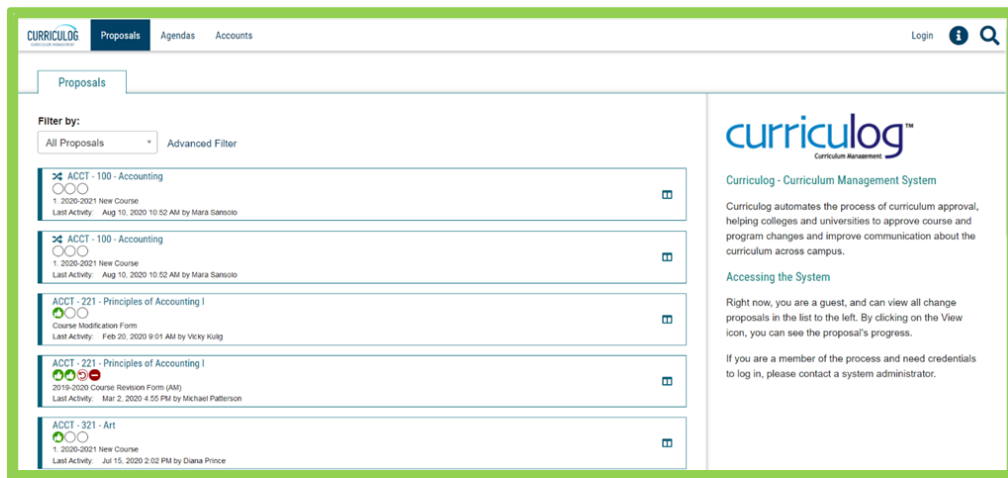
Log In

To act upon proposals, leave comments, or provide decisions - you **must** have a user account and login. The login page is available to anyone who accesses the Curriculog website. To login, navigate to the upper right corner of the screen and select "Login".
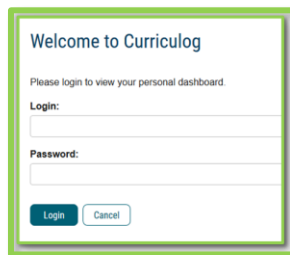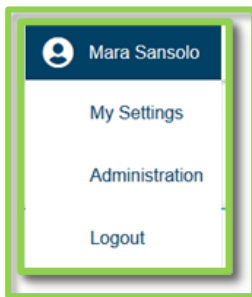
Users

MY DASHBOARD

Once you have logged into Curriculog, the first screen you will see is "My Dashboard." This dashboard will serve as your gateway to Curriculog and allow you to manage your proposals and see recent notifications and upcoming events at a glance.


Once you have logged in, you will find several items within your dashboard. Across the top of the page you will find a persistent toolbar, from which you may access the <u>Proposals</u>, <u>Agendas</u>, <u>Accounts</u>, and <u>Reports</u> Modules.
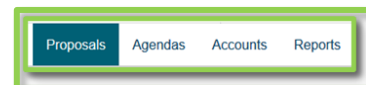
In the upper right corner, there are options for your own user account listed below the drop-down menu, giving you options for My Settings (selecting My Settings will redirect you to the Accounts Module from the top menu), Administration (only available if you are also an administrator) and Logout.

Following your name are "Help" ⓘ and "Search" 🔍 icons. If you select "Help," a window featuring symbols and colors utilized in Curriculog will display.
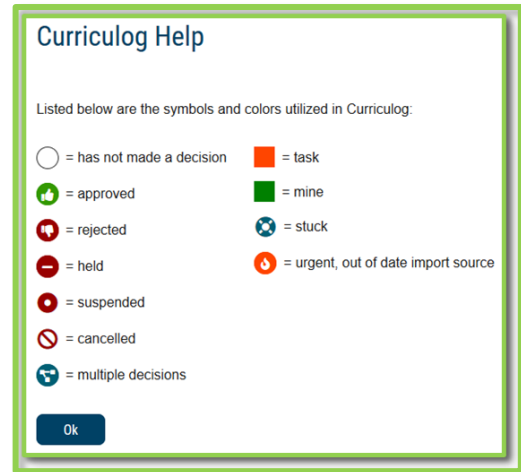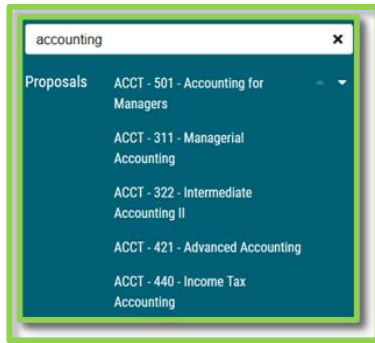
The search function may be used to locate proposals based on their titles or users throughout the system.

Note: *For more effective searching, we recommend using the Advanced Filter within the All Proposals tab.*

The right pane will display <u>My Recent Notifications</u> and <u>My Upcoming Events</u>. The left pane will update based on the tab selected.

If tasks are waiting to be completed, or if any of those tasks are marked as urgent, clickable links will appear just under the My Dashboard header. Selecting either the number following Tasks or Urgent will display the My Tasks tab in the left pane.

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 – some users choose to receive an e-mail notification as soon as the event occurs, while others choose to compile them into a digest to limit the number of e-mails received. In some cases, the Administrator may choose the e-mail settings on your behalf.
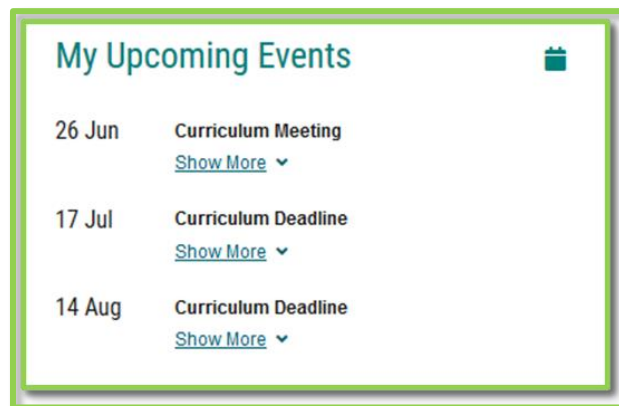

The My Recent Notifications section of the Dashboard will show you the five most recent notifications. If additional actions are required, there may be a link provided within that notification. To scroll through more options, select the arrow in the upper right corner to scroll through them.
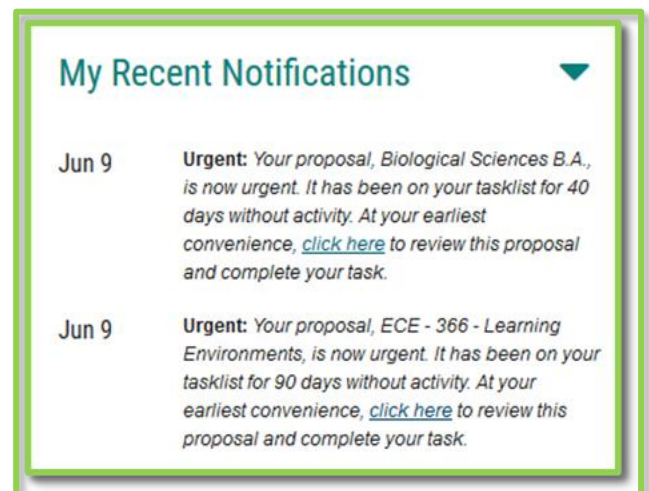
My Upcoming Events

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: O**nly an administrator can add events to the calendar.*

My Upcoming Events

| 26 Jun | **Curriculum Meeting** |
	Show More ⌄
17 Jul	**Curriculum Deadline**
	Show More ⌄
14 Aug	**Curriculum Deadline**
	Show More ⌄

Selecting one of the upcoming events will expand and show additional details.

The calendar included within Curriculog 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.

PROPOSALS

A proposal is a form that follows a workflow to receive an approval and is tied to an approval process in a 1:1 relationship. Proposals may be used to create or make changes to courses 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 Proposals tabs.

| • My Tasks | • My Proposals | Watch List | All Proposals |
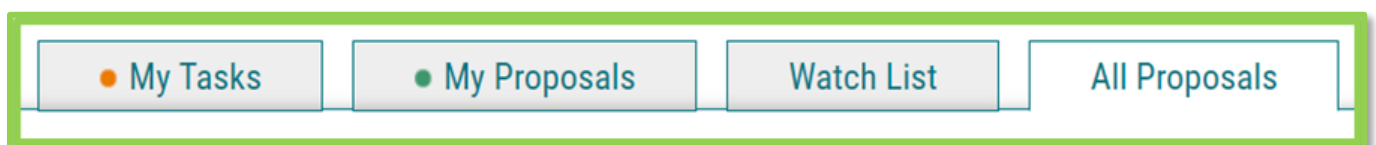
- **My Tasks** - lists all proposals in which you are an active participant and awaiting action from you.
- **My Proposals** - lists all proposals you have created, whether they have been launched or not.
- **Watch List** - lists all proposals you have selected to watch. You may or may not have editing 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.
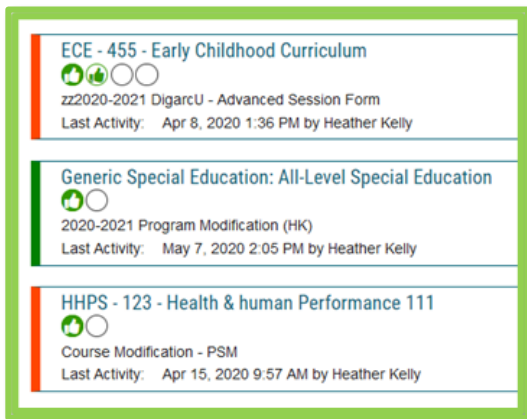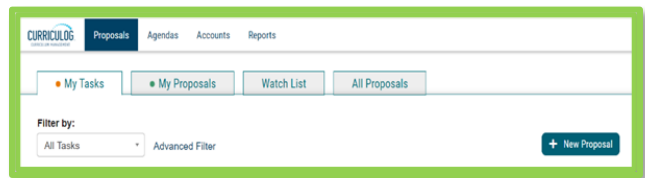
- **Blue** - No action currently required as you are not an active participant on this proposal on the current step.
- **Green** – You are the originator of this proposal, but you are not an active participant on the current step and no action is currently required.
- **Orange** – You are an active participant on the current step and an action is required from you.

There are 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.

✉ **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 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 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

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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.