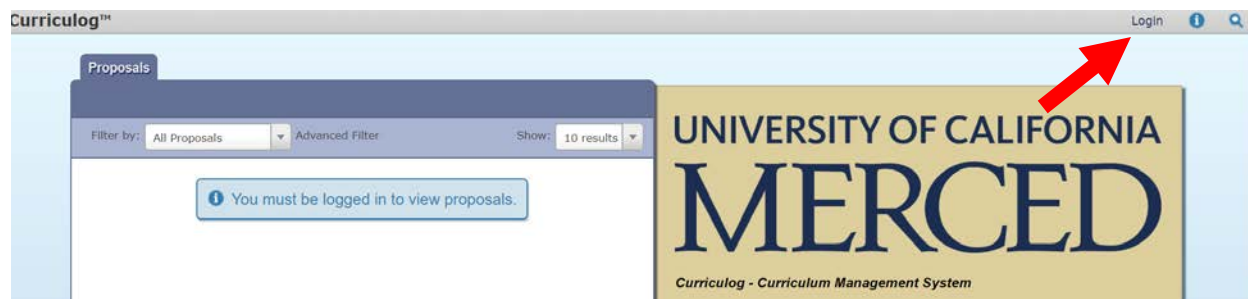











Creating a Proposal

1. Log into Curriculog <https://ucmerced.curriculog.com/>
2. Click on “Login” and sign in with your UCM net ID and password



3. Once logged in, click on the “Proposals” tab and click  + New Proposal
4. The left panel will indicate the approval forms that are available:
 - a) *Single Course - Create New* - use to create a new course
 - b) *Single Course - Modify Existing*- use to make any modifications to a current course
 - c) *Single Course - Discontinue Existing* - use to discontinue an active course
 - d) *Crosslisted Courses (UG/UG or GR/GR)* – use **only** for crosslisted courses
 - e) *Conjoined Courses (UG/GR)* - use **only** for conjoined courses


****For complex proposals, please see the “Navigating Complex Proposals in Curriculog” document for assistance to which approval form(s) to fill out. ****

5. Hover over the desired approval form and click  to start the proposal.
6. The form will appear on the left pane and the “Proposal Toolbox” on the right pane.
 - a) The “Proposal Toolbox” has the following tools:
 -  Displays the workflow steps
 -  Allows you to attach a file to the proposal.
 -  Will allow you to create a crosslist/conjoined course proposal. **Only** for the crosslisted and conjoined forms.
 - b) To expand the left pane, click  on the top right of the left pane.
7. Click  located at the top right of the left pane to expand the help text in the form.
8. Click  Save All Changes at the bottom of the screen or  at the top of the left pane to save your progress. You may save changes and return to the proposal later.
9. When filling out a proposal, adhere to the following guidelines
 - a) *Single Course - Create New* - fill in all required fields from scratch.
 - b) *Single Course - Modify Existing, Single Course - Discontinue Existing, Crosslisted Courses (UG/UG or GR/GR) and Conjoined Courses (UG/GR)* - Import the existing course information from the catalog

****If filling out a proposal for *Single Course Create New* you could skip steps 10 and 11. ****

Use the acronym “IDEA” to ensure your proposal is created in the proper order.

IMPORT VALIDATE & LAUNCH EDIT APPROVE

10. To import a course, click  at the top left corner of the left pane.

a) This will open a pop-up window listing the available catalog you can import from. Hover over the

desired catalog and click  to open the search filter.

b) Look for a course based on a specific field, or combination of fields. Use the ‘Filter by Field’ dropdown menu to select a field - *like Prefix and/or Code*

c) Enter the course information to search for a specific course.

d) Uncheck the “Exclude previously imported items” box

e) Click “Search Available Curriculum”

f) Once your results have been returned, click on the title of the course you wish to import.

g) By default, all data points will be marked for import. To complete the import, click ‘Import this Item’ at the bottom of the page.

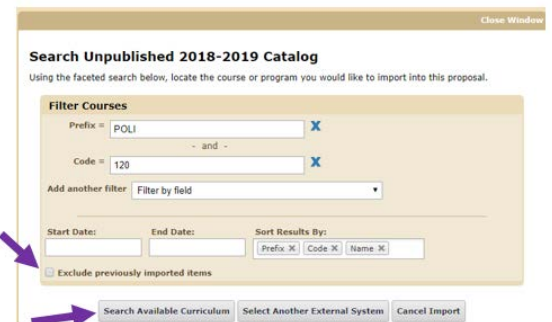
- **Note:** Do not uncheck any of the import fields.

- **Note:** If the system shows an error message when trying to import, do not be alarmed. It is indicating that there is no current data for that field.

h) Once you have imported the information, the window will close and your proposal will populate with all of the information from the course catalog.



Import Data Into Your Proposal
Select an external system from which you would like to import curriculum data.
Catalog: Unpublished 2018-2019 Catalog
Cancel Import



Search Unpublished 2018-2019 Catalog
Using the faceted search below, locate the course or program you would like to import into this proposal.
Filter Courses
Prefix = POLI X
Code = 120 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

Field Name	Data Preview	Import Field
General Catalog Information: Course Subject	POLI	<input checked="" type="checkbox"/>
General Catalog Information: Course Number	120	<input checked="" type="checkbox"/>
General Catalog Information: Course Title	Voting Behavior, Campaigns, and Elections	<input checked="" type="checkbox"/>
General Catalog Information: Abbreviated Title	Voting, Campaigns, & Elections	<input checked="" type="checkbox"/>
General Catalog Information: Fixed / Variable Units	Fixed	<input checked="" type="checkbox"/>
General Catalog Information: Number of Units	4	<input checked="" type="checkbox"/>
General Catalog Information: Lower Level Limit	[no data]	<input type="checkbox"/>
General Catalog Information: Upper Level Limit	[no data]	<input type="checkbox"/>
General Catalog Information: Course Description	Voting behavior, voter turnout, campaign strategies, and election outcomes.	<input checked="" type="checkbox"/>
General Catalog Information: Level of Course	Undergraduate	<input checked="" type="checkbox"/>
General Catalog Information: Grading Option	Normal Letter Grade with Pass/No Pass option	<input checked="" type="checkbox"/>
General Catalog Information: Anticipated term(s) course will be offered	[no data] No matches were found The following option could not be imported:	<input type="checkbox"/>
Requisites and Restrictions: If yes, make changes here. If no, skip this step.	[no data]	<input type="checkbox"/>
Requisites and Restrictions: If yes, make changes here. If no, skip this step.	[no data]	<input type="checkbox"/>
Requisites and Restrictions: If yes, make changes here. If no, skip this step.	[no data]	<input type="checkbox"/>
Requisites and Restrictions: If yes, make changes here. If no, skip this step.	[no data]	<input type="checkbox"/>
Requisites and Restrictions: If there are changes to the course sequence, list them here. If no, skip this step.	[no data]	<input type="checkbox"/>
Requisites and Restrictions: If yes, select all applicable majors/minors. If no, skip this step.	[no data] No matches were found	<input type="checkbox"/>

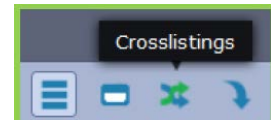
Import This Item Return to Search Select Another External System Cancel Import

- *** Once you import the existing catalog data, **DO NOT** make changes to the existing information. Complete the remaining required fields and launch your proposal. Further instructors on how to launch the proposal are found in step 13.
- *** Make edits to the proposal **after** it has been launched. Instructions on how to make edits to the proposal can be found in step 14.
- **Note:** Do not import one course on top of another course in the same proposal form. Start a new proposal to import another course and delete the old proposal.
- **Note:** You will need to click the “Save All Changes” button after selecting the department in to ensure that the proposal follows the correct workflow. Ensure the department is the correct one; once the proposal is launched, the department cannot be revised.

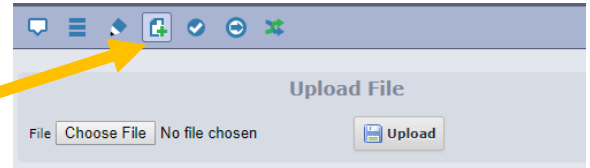
**If you are not filling out a *Crosslisted Courses (UG/UG or GR/GR)* or *Conjoined Courses (UG/GR)* form you can skip step 11. **

11. Setting up a crosslist/conjoined course


- Fill out the proposal from scratch for a new course or import course data if you are modifying an existing course or discontinuing an existing course. **Once you import the existing catalog data, **DO NOT** make changes to the existing information**
- Once the parent form is completed, select the crosslistings icon from the “Proposal Toolbox”
- Select ‘Add Crosslisting’. Once you have selected ‘Add Crosslisting’, the second proposal will appear listed below.
 - **Note:** Make sure that you add the crosslisted/ conjoined course(s) before launching because once the proposal is launched you *will not* be able to add a crosslisted/conjoined course.
- Fill out this new proposal
 - **Note:** Not all fields may be edited, as they are tied to the parent proposal. If you wish to make a change in these fields, you will need to make the change in the parent proposal. The changes will automatically update within the child proposal. Fields that can be edited in the child proposal will not be grayed out.
- Note:** You will need to click the “Save All Changes” button after selecting the department in the child course to ensure that the proposal follows the correct workflow. Ensure the department is the correct one for both parent and child proposal; once the proposal is launched, the department cannot be revised.
- When you are done, you will need to return to the parent in order to launch the proposal. This icon is located in the same location as the launch icon.
- Once launched, they will appear in the tasks window as two separate proposals. Any edits made to linked fields in the parent will automatically update within the child proposal.

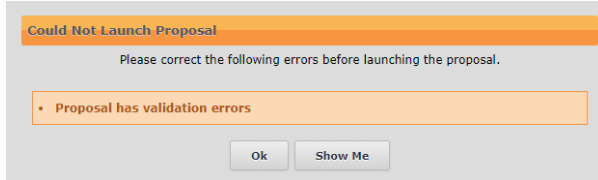


12. To attach a file, select the 'Files' icon from the "Proposal Toolbox". Next, select the 'Browse' button to locate the file on your computer, and click 'Upload.' The attached file will now be available within the proposal for review.

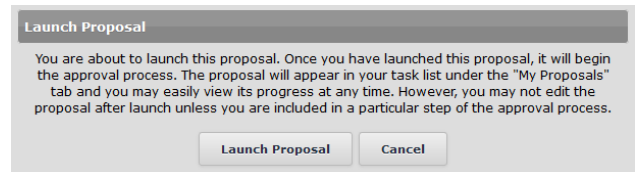


13. Once you have reached the end of the form, you will need to launch the proposal.

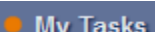
- a. To launch the proposal, click  icon in the upper left corner of the proposal.
- b. An error message will appear as follows indicating if there are any errors.




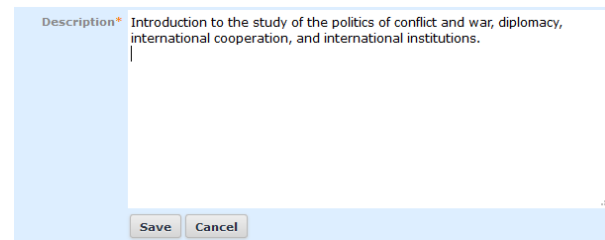
- c. If no errors, you will receive the following message.
- d. Click "Launch Proposal"



14. Once the proposal has been launched, it will move to the first step in the approval process workflow. This is where you can make your changes to the proposal.

- a. Click  located top left corner of the left pane.

- b. Click  when hovering over the proposal you have just launched.
- c. To make edits to a particular field, click on the field and make your edits.

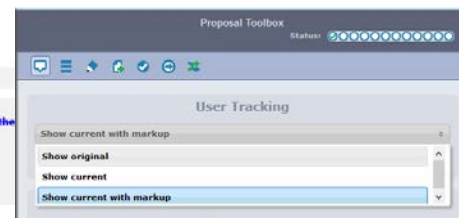


- i. For crosslisting/conjoined courses, *note* that not all fields may be edited in the child proposal. To edit those fields, you must go to parent proposal and make the edits there. The changes will automatically update within the child proposal.
- ii. When making changes to a text field, you must press the save button at the bottom of the field to save your modifications.


- iii. As your changes are being made, the system will now track all modifications.



- iv. To review your modifications, you can use the 'User Tracking' dropdown menu on the "Proposal Toolbox" and select 'Show current with markup'. This will highlight all of your changes with an edit color. As other users modify the item in future steps, they will also be assigned a different edit color as needed.



15. After making edits, you will need to enter a decision in order to advance the proposal to the next step in the workflow.

a) Select  from the “Proposal Toolbox” to make a decision



b) Click on a decision. The following explains the different types of decisions:

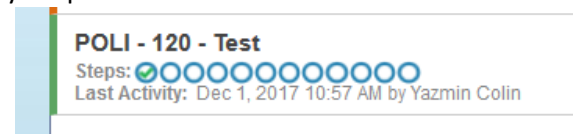
- **Approve**- the proposal will advance to the next step. Entering a comment is optional when selecting Approve
- **Reject**- the proposal will return to the previous step. A comment will be required when choosing this decision.
- **Hold** – Submits a request to a system administrator for the proposal to not advance in the approval process. A comment will be required when choosing this decision. If approved, the proposal will remain on the current step until an administrator releases the hold; the participant(s) on the step can continue to edit the proposal. If the Administrator rejects the request, the proposal will remain on the current step awaiting a decision.
- **Suspend** – Submits a request to a system administrator for the proposal to not advance in the approval process. A comment will be required when choosing this decision. If approved, the proposal will remain on the current step until an administrator releases the suspension; the participant(s) on the step cannot work on the proposal. If the Administrator rejects the request, the proposal will remain on the current step awaiting a decision.
- **Cancel** – Submits a request to a system administrator to cancel the proposal and delete it from Curriculog. If the administrator approves the cancel request, the proposal will be referred back to the originator. The originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.


A form titled "Your Decision" with the question "What would you like to do with this proposal?". It has five radio button options: Approve, Reject, Hold, Suspend, and Cancel. Below the options is a text area labeled "Please comment on your decision below." and a "Make My Decision" button at the bottom.

c) After selecting your decision click “Make My Decision” button at the bottom.



16. The proposal will now move onto the next steps in the workflow. During this time, you can see where in the workflow your proposal is at by navigating to “My Proposals” tab.

a) The circles at the bottom of the title represents each step in the workflow.



b) Click the  icon on the top right hand side to display a window featuring symbols and colors utilized in Curriculog.

c) To view further details, hover over the proposal and click “View Proposal.” In the

“Proposal Toolbox”, navigate to the  icon to view comments and  icon to view the status.

17. For more assistance, please contact a system administrator by clicking the “Contact System Administrator” link at the bottom of any page that you are on. Fill out the dialog box that appears and an administrator will get in contact with you.