Proposal Decisions (Approvals)

An email will be sent to you when the proposal is ready for you to make a decision.

1. Click the “My Tasks” tab

2. Hover over the line with the name of the proposal you are working on to see the options available.

3. Select the proposal by choosing the “Edit Proposal” button

4. Go to the Proposal Toolbox on the right side

**Explanation of Icons:**

- **Discussion**: shows prior approvals and comments that were made on previous steps.
- **Status**: shows the status or proposal history.
- **Signatures**: shows signatures that have been used or required. We have opted out of this feature as we are using the decisions button (fifth button).
- **Files**: used for attaching files that can be uploaded, if necessary.
- **Decisions**: used to make decisions about the proposal.
- **Custom Route**: additional ad hoc step outside the steps in the approval process - allows you to bring someone else into the proposal that is not included within the current steps.
- **Crosslisting**: this is used for course proposals if a course is crosslisted with another.
5. Review the Proposal:
The proposal information is visible for review on the left side.

   a. Look under the discussion tab on the right to check for comments.
   b. Look under status to check approvals and changes that were made.

6. View Changes:
   a. If changes were made, review them by selecting the discussion button.
   b. Click the “Show current” selection under user tracking.
   c. Select “Show current with markup” to see changes that were made to the proposal.
   d. Review the proposal on the left side of the page to see changes. Red indicates removal and Green indicates addition.

7. To make a Decision:
   a. Click the “Decisions” icon (If not ready to approve, you may log out and return another time.)
   b. Select your decision
   c. Click “Make My Decision”

8. After your decision:
   An email will be sent to the next person in steps for approvals.

9. Review Status:
   You can review the proposals on the “All Proposals” tab.

10. Log out
**Definitions for Decisions**

**Approve**: the Proposal will advance to the next step. Entering a comment is optional when selecting Approve, however, all other options will require a comment be entered.

Additional options may include Hold, Suspend, Cancel, and Custom Route. If you select one of these options, a request will be sent to the Administrator to approve or reject your request. See more information below:

**Hold** - Submits a request for the proposal to not advance in the approval process. The request is sent to the Administrator, who will approve or reject the request. 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.

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

**Suspend** - Submits a request for the proposal to not advance in the approval process. Additionally, no work may be done on the proposal and it will not advance in the workflow until the suspension is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspension placed on a proposal.

**Custom Route** - A custom route is an additional ad hoc step outside the steps in the approval process. Custom routes require Administrator approval. This will allow you to bring someone else into the proposal that is not included within the current steps of the proposal.

**Custom Route**: 

1. To begin a Custom Route, you will need to select the Custom Route option as a decision from the decision tab, and then select Make My Decision.

2. The custom route workflow will open, allowing you to choose the participant you would like to custom route the proposal to.
3. Select the grey arrow to the left of Participants and the option will expand. Select “Add Participant”.

4. Rules include four options. Within rules, you may determine whether the users involved in this custom route step will have the ability to edit the proposal and/or make comments. You may also determine whether this step requires a signature from the user.

5. The last option is a drop-down menu allowing you to determine who may view comments made during this step. You may allow all users (including guests without logins) to view comments or you may restrict it to one of the other options available from the drop-down menu.

6. You may utilize the + symbol to expand the hierarchy items to view roles and utilize the + symbol to expand the users below each role. Click on the user to select them and their row will be highlighted blue. Next select “Add Role(s”). You may select multiple roles or individuals within this workflow. Note that when creating a Custom Route, you must select the Hierarchy option, and choose a participant from an existing role.
7. Editing the Deadlines/Reminders

   a. This option allows you set a number of days to be allowed for a step and determine if reminders are to be sent to the users involved on the step. You may choose to automatically reject or approve the step if the deadline passes without action. You may also add users to be notified if the deadline passes without action.

   b. Additionally, a comment will need to be entered before selecting “Request Custom Route”.

   c. When the Administrator makes a decision on the custom route, you will then be able to make your decision on the proposal. Once your decision is made, the proposal will then be advanced to the custom route (if approved).

If you have any questions, please email curriculum@purdue.edu or call Kimberly Watley at 765-494-8235.