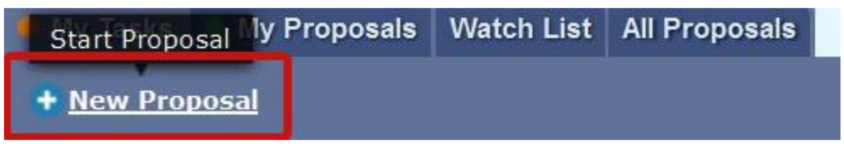
How to Start a New Proposal

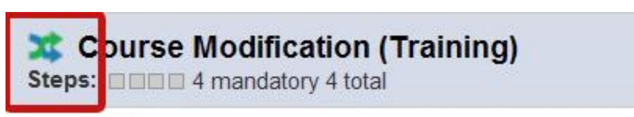
#6 - we also have curriculum as a hard coded field for program proposals, however, most of those fields get renamed so users might not know what you are referring to. example, hierarchy always gets changed to department or school or college

After logging in and navigating to the Proposals module choose the New Proposal link (this is available from all four tabs).

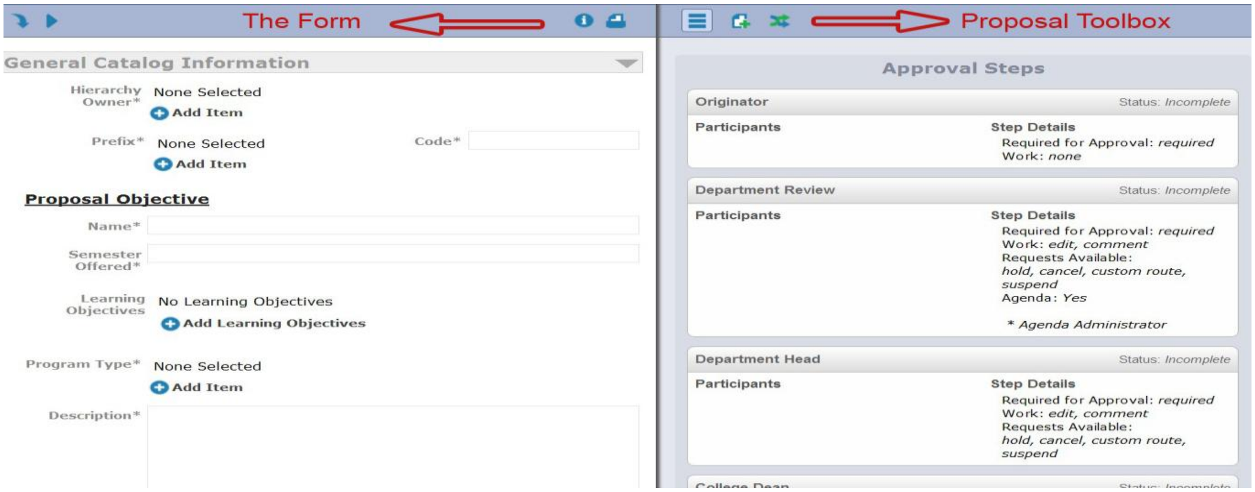


Choose an Approval Process that has been created by an Administrator and click the check mark icon. You can filter your Approval Processes by type using the tabs at the top.

In order to cross-list a course you will need to choose an Approval Process with cross-listing capabilities which can be found by locating the cross-list icon to the left of the AP.

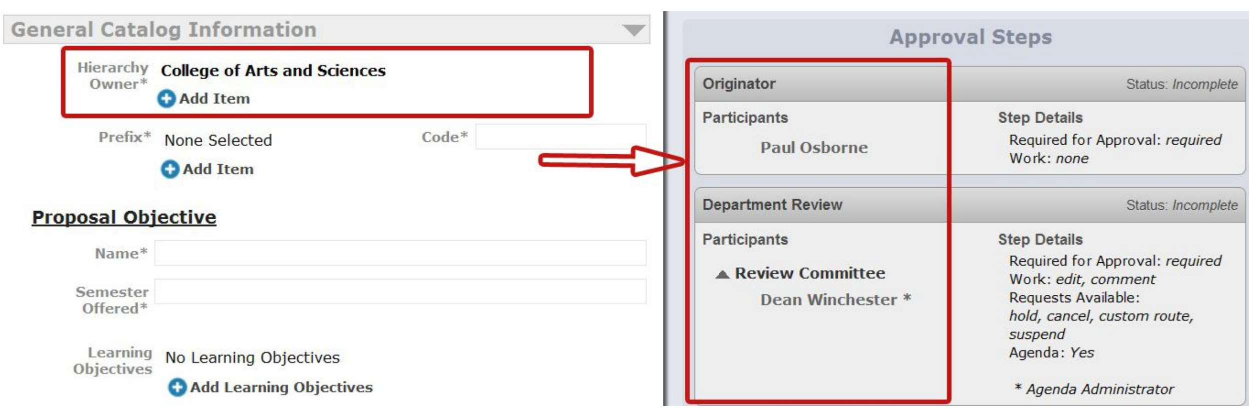


Before launching the Proposal you will need to fill out all fields marked with an asterisk (*) located in the Form (left side) and make sure that all Participants have been filled in the Proposal Toolbox (right side). You will be prompted with orange error text if you neglect to fulfill any of these requisites.

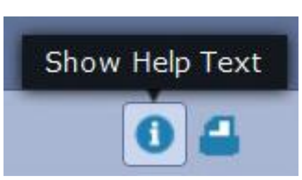


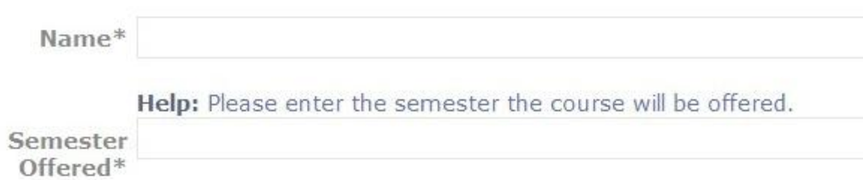
Some fields may vary based on the Approval Process you have chosen however you will ALWAYS have Hierarchy Owner, Prefix, Code, Name and Description for Courses, and Hierarchy Owner, Title, Description and Program Type for programs. (The titles of all fields may be customized specific to your institution, for example instead of Hierarchy you may see Department or School)

As long as the roles are filled, the Participants for each step will auto populate once you've chosen a Hierarchy Owner from the smartfield in the Form.

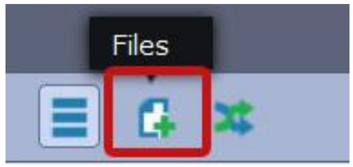


You can turn on the help text with the icon at the top of the screen. This will give an explanation of fields that have help text entered (this is set up via Administrator).





You can also attach a file by choosing the Files icon from the Proposal Toolbox and following the steps to upload the attachment.



Once you have filled in all of the required fields and all of the Participants are filled, you can launch the Proposal by clicking the Launch Proposal Icon.