Approval Process

A CurricUNET Reference Guide

CurricUNET

Transforming Education Through a Worldwide Curriculum Network

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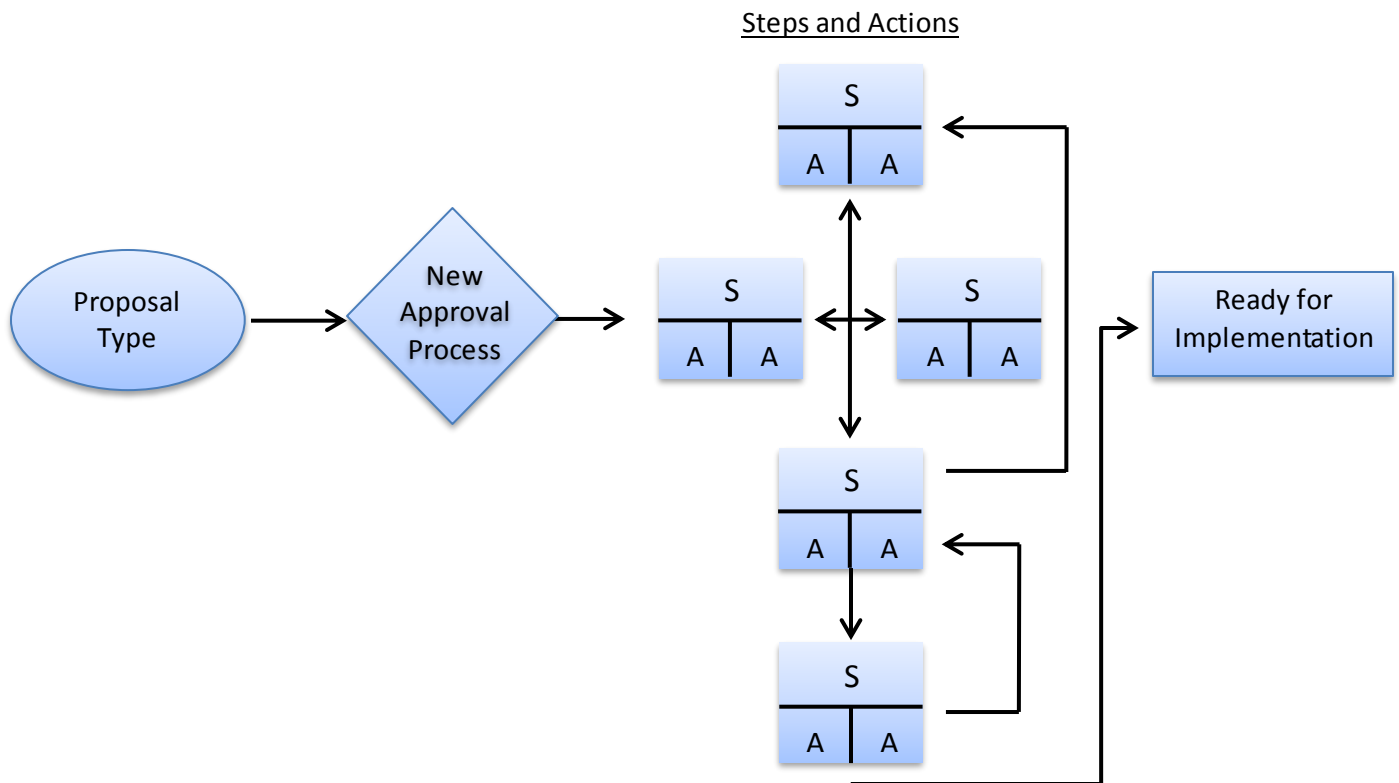
Creating an Approval Process

Steps and Actions

Figure 1

Purpose

A vital stage in the development of courses and programs is the process leading to its approval. In this process, administrators from many academic areas review the new or revised curriculum to ensure it meets certain expectations. CurricUNET provides a method to create customized approval processes that are streamlined and specific to the institution's needs (Fig. 1). This ensures flexibility between departments, provides exceptional approval tracking capabilities, minimizes errors, and expedites processing time. Since CurricUNET is web-based, administrators can log in anywhere they have internet access to check the status of their proposals or take action on pending courses or programs.

Please note that due to the vast number of CurricUNET sites, the screen shots and verbiage in this guide may be slightly different than your CurricUNET site. However, the concepts are the same. For further information, please contact your CurricUNET representative at 208-522-1225.

Creating a New Process

Proposal Type – Before creating a new approval process, an administrator must first create a new proposal type. The proposal type defines the purpose of the proposal (that it will be used for new, modified, or deactivated curriculum) and gives the process a title. A new proposal type must be created for every process.

Figure 2

Under the Admin heading of CurricUNET, select "Look-up Data". Locate and select "Proposal Types" (Fig. 2). In the first drop down menu, select whether the proposal will be used for courses or programs. From the second drop down menu, select the proposal type: *New, Deactivate, or Modify*. Label the proposal type and select "ADD". Once the proposal type has been created, it will be added below and can then be either edited or deleted (dropped).

Note: New – Proposing a new course or program to an institutions curriculum. Deactivate – Removes a course or program from an institution's curriculum. Modify – Updates an existing course or program.

Approval Process – Now that the proposal type has been created, a new approval process can be constructed. Under Admin, select "Approval Process". Under Process, select "New Process" (Fig. 3). Title the approval process and select the proposal type that was just created using the "Proposal Type" drop-down menu. In the "Type" drop-down menu, select what type of proposal the process will be used for: *Course or Program*. Select "Save". The "Version Title" box will now be displayed. The version title allows

Figure 3

the user to keep track of the version of the process. *This field will be used in the "Copying an Approval Process" function that will be discussed later.* Typically, a user can keep track of the version by putting the current date in this field. Select "Save".

Steps

Steps – The Process Checklist is now displayed and the user is in the "Edit Process" function (Fig. 4). No further action is required on this screen. The approval process will be divided into several areas known as steps that define who will review the proposal and what actions they may take. Each step will outline exactly what needs to take place before the curriculum can move

forward to the next level. A visual representation of the approval process is available by clicking on the "Visual" button under the "Main" category (Fig. 5).
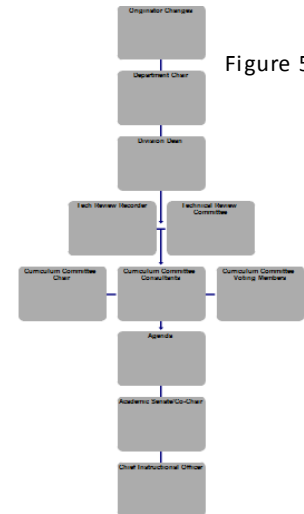
Click on "Steps" to add a step.

Step – The "Step" field is the name of the step.

Short Title – An abbreviation of the "Step". Make sure the short titles are consistent with the steps in all other processes.

Step Type – This field allows the user to determine if this step is optional or required. If the step is optional, this indicates the step is intended for information and feedback purposes only and is not required to be taken to move the proposal within the approval process. Positions with multiple users (such as committee members or faculty senates) must be marked as optional. If the step is marked as "Required", action must be taken by that position in order for the proposal to move within the approval process. Required steps should have only one user tied to the position, such as a dean or curriculum committee chair, where they will act as the main decision maker.

Level – The level designates the numerical order of the steps during the approval process. A level may have multiple steps as illustrated above (Fig. 5). *Note: If a level has only one step, that step must be marked as "Required". Otherwise, the proposal will not advance.* Make each major step a whole number (i.e.: 1,2,3,4,5 etc.) and use half (.5) or quarter steps (.25) for change and hold steps respectively.

Days – The "Days" field determines the amount of time that has been allotted for that step. If the step has not been completed in this time frame, reminder emails will be sent out daily to the assigned position until the step has been completed. If a default action has been entered for the step, CurricUNET will automatically perform the default action after the allotted time has been reached in order to allow the proposal to move forward in the process.

Administrative Hold – If a process needs to stay at a specific level in the process for a defined amount of time even if the required steps have been carried out, an administrative hold can be inserted into the process on the same level. This is typically helpful when a step needs to be available for review by other positions for a certain amount of time even though the step may have already been approved.

An administrative hold also acts as a holding/automatic forwarding step when there are two or more required steps on a level and the proposal needs to bypass an originator change step. To learn how to perform these functions, look for "**Administrative Hold**" at the end of this guide.

Positions – When a CurricUNET user account is created, the profile is typically assigned various approval functions such as Curriculum Committee Member, Articulation Officer, or Dean. The position determines which user is assigned to take action for that step. Select the appropriate position for the step. If other positions are required to be involved at the same level, multiple steps can be created to accommodate more positions since a step may have only one position.

Note: If an approval function has not been assigned to a user, go to "Admin" → "Users" and locate the user and select [A] (Edit Approval Functions). Select [Create] and choose the appropriate position for the user. Select [OK].

Description – The purpose of the step is typed into the "Description" box.

Figure 7

ADD – Select [ADD] when all of the proper information has been placed into the step. The step will then be moved under the "Steps" box (Fig. 7). The step can be edited, new steps can be created, or actions can be assigned to the step. *Note: It is best to create **all** the steps in the work flow **before** moving on to assigning actions*.

Originator Launch	
Level	1.00
Type	Required
Days	1.00
Description	Proposal Launch
Position	Originator
Actions	

Commonly Used Steps

Originator Launch – This step is used at the beginning of each approval process. The CurricUNET system will generally complete the first step in the approval process automatically when the proposal has been submitted. This step also acts as a reference point to where proposals may be returned for revision.

Committee Members – The step type for committee members should be marked as "Optional". There are several members on a committee and each person should have the opportunity to add comments to the proposal. Marking a step "Optional" allows comments from multiple people within a position.

Deans and Chairs – The step type for deans and chairs should be marked as "Required". These positions act as the decision maker when placed on the same level as committees. Only one person should be associated with these positions to ensure only one position takes action for the committee.

Hold Step – When placed on the same level as other steps, the hold step can make the proposal wait for a specific amount of time before moving on. The hold step can also circumvent a change step when it is placed between the change step and a level where there are two or more required steps. (See "Administrative Holds and Originator Changes" for more information.)

Originator Change – If a proposal is rejected by any required step, the process can be sent back to the originator for revision. Insert an originator change step before each key approval level. (See "Administrative Holds and Originator Changes" for more information.)

Final Step – The final step in the approval process activates or retires the proposal and removes it from the work flow. The curriculum can be implemented when the action is taken or implemented at a future date. There should be no actions to send the proposal back for changes since the revisions should have been carried out in previous steps.

Actions

Creating Actions – Once a step has been created, an action can be assigned to move the proposal to the next level. The action can be designed to advance the proposal to the next step upon approval or kick the proposal back to a previous step upon denial.

Under the "Process Checklist", select "Actions". All of the steps in the approval process will be displayed. Under the desired step, select "Add Action" (Fig. 8). The "Step Actions" field will be displayed with the "Position", "Level", and "Title" information already populated from when the step was created (Fig 9).

Action – The actions determine the choices the approver has when they review the proposal. Several actions may be assigned to a step. Customized actions may be added or removed by going to the look-up data under "Process Actions".

There are three special hard-coded actions that *should not* be manipulated in the "Process Actions" section. They are: **Implement**, **Approve for Later Implementation**, and **Default**.

Figure 9

> **Implement** – This action is only used on the last step in the approval process. It signifies the proposal has gone through all the proper approvals and the governing body's final decision is ready to be immediately implemented.

> **Approve for Later Implementation** – This action is also only used on the last step in the approval process. It signifies the proposal has gone through all the proper approvals, but the governing body's final decision does not need to take effect until a future date. Whoever selects "Approve for Later Implementation" as the action for a proposal will be given a text field where they can enter in the date the action will take effect.

> **Default** – There may be times when you want to have CurricUNET automatically move the proposal to the designated level after the "Days" expire without requiring any action from the assigned position. This is mostly applicable for administrative hold steps. To do this, open up the desired action and make sure the action is set to "Default". The step will now advance the proposal to the designated level when the days expire.

COURSE State – This determines the state of the course as it moves through the approval process. The definitions are as follows:

> **Active** – The "Active" state denotes the course or program is currently part of the institution's active curriculum. This state is used by the CurricUNET system and appears here only for the purpose of a manual override. "Active" should not be used as a state when creating an approval

process. The CurricUNET system will automatically update the course or program to an active state once the implementation date has been reached.

Historical – The "Historical" state denotes the course or program has been retired and is no longer part of the institution's active curriculum. This state is used by the CurricUNET system and appears here only for the purpose of a manual override. "Historical" should not be used as a state when creating an approval process. The CurricUNET system will automatically update the course or program to a historical state once the implementation date has been reached.

Pending – The "Pending" state signifies the proposal is currently undergoing review in the approval process and has been temporarily opened for editing. An action should only be labeled as "Pending" if the proposal is being sent to a specially designated position (level) for editing (such as the originator at an originator change step).

Launched – "Launched" is the most commonly used state in the approval process and should be used for the majority of the actions. This state signifies the proposal is currently under review and has been locked for editing so no one can make changes to the proposal.

Approved – The "Approved" state will be used in the last step in every process (coupled with the action of 'Implement' or "Approve for Later Implementation"). The "Approved" state indicates the proposal has been reviewed by every applicable position and is ready to have the CurricUNET system update the state to either "Active" or "Historical" (depending on the proposal type) when the implementation date arrives.

NONE – If "NONE" is selected, the current state of the action will default to the previous step's state. If no state has ever been designated, the state will default to "Launched".

Next Level – The "Next Level" field determines the next destination of the proposal once action has been taken (Fig 9.5).

Numerical Values – The proposal can move to any level (either forward or backward) in the process when a numerical value is selected. However, it is important to note that once an action has been taken to move the proposal to another numerical level, the ability to add comments or take action for any other positions on that level will immediately expire.
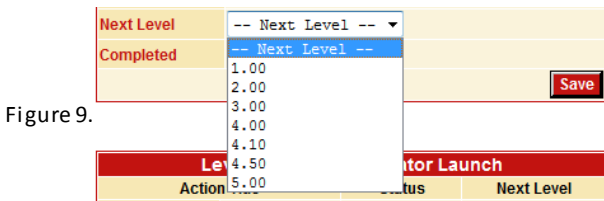

Figure 9.

Next Level – If "Next Level" is selected, the proposal will move to the next numerical level once all required steps have taken action. The "Next Level" designation must be used when there are two or more required steps on the same level to give time to both required positions to complete actions.

Completed – The completed box signifies the proposal is ready to be removed from the approval process (Fig. 10). A proposal should be removed under two circumstances: 1) On the last step when the proposal has been completely approved and has moved through the work flow and is set for implementation, or 2) When someone with ultimate jurisdiction at a strategically placed step deems the proposal unfit to continue with the approval process.
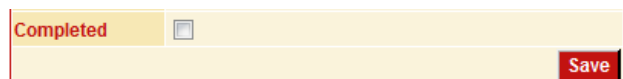

Figure 10

If a proposal is removed from the work flow before it reaches the final step, the originator cannot modify the rejected proposal. They will have to start the process completely over and resubmit a new proposal.

If the proposal is removed from the approval process as a result of completion, the proposal will be moved to the "Completed Proposals" section under "Track". If the proposal replaced another proposal due to a modification, the old piece of curriculum will be automatically updated to "Historical" while the newly approved curriculum will be categorized as "Active".

Checking the "Completed" box for any other step will result in the premature removal of the proposal.

Figure 11

ADD ACTION – When the action information has been defined, select "ADD" (Fig. 11). The new action will be placed below the step. Add multiple actions per each step as needed. Notice in the example that the "Disapproval" will result in the proposal being kicked back to level one while the approval will move the proposal to level three.
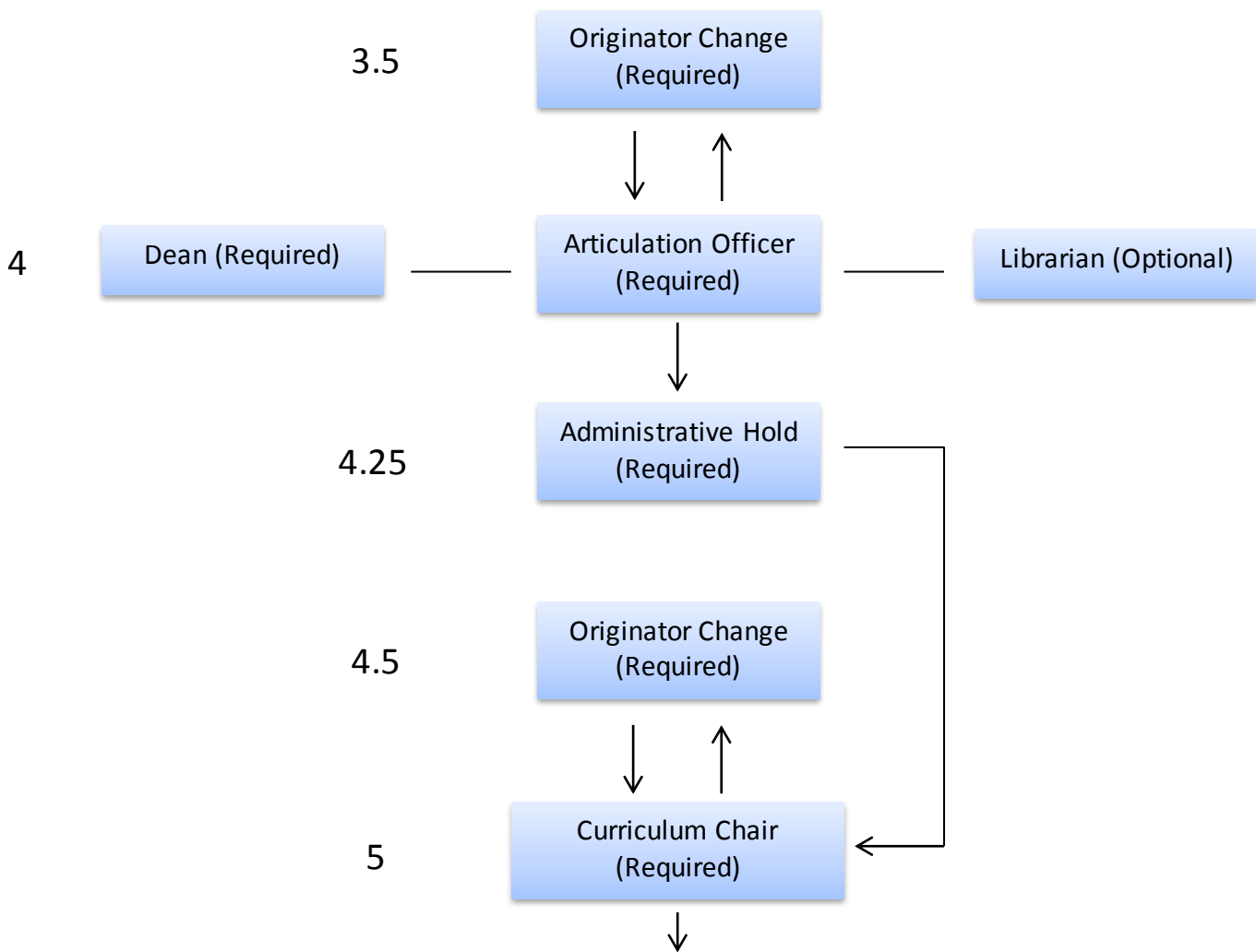
Figure 12

Messages/Positions – When an action is completed, a standardized message can be included to be automatically sent to any position within CurricUNET. This is particularly helpful when someone may be overseeing a process and needs to be informed at certain key points along the way but is not directly involved in the individual step. By selecting "M" (Fig. 12), a position and message can be assigned to the action. To add or edit messages, go to "Admin" → "Look-up Data", → "Messages".

Administrative Holds and Originator Changes

3.5 | Originator Change (Required)

4 | Dean (Required) — Articulation Officer (Required) — Librarian (Optional)

4.25 | Administrative Hold (Required)

4.5 | Originator Change (Required)

5 | Curriculum Chair (Required)

The following example is a section that has been taken out of the middle of an approval process and illustrates how to use administrative hold and originator change steps:

In this flow, an approved proposal needs to move from level four to level five. Following best practices, an originator change step has been placed before each major step (four and five).

Upon rejection by the required steps, the proposal will immediately move backwards to the change step when a numerical value has been placed in the "Next Level" field. When the originator makes the necessary changes, the proposal can be returned to the level that rejected it.

Since there are two required steps on level four, each approved "Next Level" field must be set to "Next Level". If a numerical value was used and one position approved the proposal, the other required position would not be able to take action. If the "Hold Step" was not used, the approved proposal would unnecessarily move to a change step. The hold step circumvents the change step by utilizing a default action and sends the proposal to the proper level.

Overview of Creating Steps and Actions

Here is how the steps (left) and actions (right) are created for the illustration above:

Level 3.5: Originator Change (Required)

Action: Approve
Course State: Launched
Next Level: 4

After the originator makes the requested changes, the proposal will return (locked) to level four.

Originator Change	
Level	3.50
Type	Required
Days	1.00
Description	Make requested changes.
Position	Originator
Actions	129 Requested Changes Made Status:Launched

Level:3.50 Step:Originator Change		
Action Title	**Status**	**Next Level**
Requested Changes Made	Launched	4.00
Messages/Positions		
		Add Action

Level Four: Dean and Articulation Officer (Required)

Action: Approve
Course State: Launched
Next Level: Next Level

Action: Disapprove
Course State: Pending
Next Level: 3.5

Note: Only the Dean step and action is shown but the layout for the Articulation Officer is identical.

Dean	
Level	4.00
Type	Required
Days	5.00
Description	Review proposal and make recommendations.
Position	Division Dean
Actions	103 Approve Status:Launched
	104 Disapprove Status:Pending

Level:4.00 Step:Dean		
Action Title	**Status**	**Next Level**
Approve	Launched	
Messages/Positions		
Action Title	**Status**	**Next Level**
Disapprove	Pending	3.50
Messages/Positions		
		Add Action

"Next Level" must be selected for the next level when there are two or more required steps on the same level (note how the "Next Level" field on the action is blank when "Next Level" has been selected). After each step approves the proposal, the curriculum will move to the administrative hold step (in contrast, putting a numerical value in the "Next Level" field would immediately move the proposal to that level upon approval while the other position would not have an opportunity to take action). Upon disapproval of either position, the proposal will immediately be sent to level 3.5 for revision regardless of the intentions of the other position.

Level Four: Librarian (Optional)

Action: Reviewed
Course State: NONE
Next Level: Next Level

The Librarian's actions will not move the proposal forward or backward since the step type is marked as "Optional". However, to allow the position leave notes about the proposal, add an action such as "Reviewed" to unlock the comments section.

	Librarian		
Level	4.00		
Type	Optional		
Days	5.00		
Description	Review proposal.		
Position	Library Director		
Actions	105 Reviewed Status:		

Level:4.00 Step:Librarian			
	Action Title	Status	Next Level
M	Reviewed		
	Messages/Positions		
			Add Action

Level 4.25: Administrative Hold (Required)

Action: Default
Course State: NONE
Next Level: 5

After each previous required step approves the proposal (provided "Next Level" has been selected), the proposal will now move to the administrative hold step as a holding place for one day to circumvent the originator change step. After the day expires, the hold step will automatically move the proposal to level five. The position that is typically assigned to an Administrative Hold step is someone who oversees the whole curriculum process (such as the curriculum specialist).

	Administrative Hold		
Level	4.25		
Type	Required		
Days	1.00		
Description	Admin Hold		
Position	Curriculum Specialist		
Actions	119 Default Status:		

Level:4.25 Step:Administrative Hold			
	Action Title	Status	Next Level
M	Default		5.00
	Messages/Positions		
			Add Action

Level 4.5: Originator Change (Required)

Action: Requested Changes Made
Course State: Launched
Next Level: 5

This originator change step is in reference to level five, the curriculum chair. If the curriculum chair rejects the proposal, they can send it back to the originator (in a pending status) to make revisions. Once the changes have been made, the originator will send the proposal back to the step (in a launched status) that rejected the curriculum.

<table>
<tr><td colspan="2" align="center">**Originator Change**</td></tr>
<tr><td>**Level**</td><td>4.50</td></tr>
<tr><td>**Type**</td><td>Required</td></tr>
<tr><td>**Days**</td><td>3.00</td></tr>
<tr><td>**Description**</td><td>Make requested changes.</td></tr>
<tr><td>**Position**</td><td>Originator</td></tr>
<tr><td>**Actions**</td><td>129 Requested Changes Made   Status:Launched</td></tr>
</table>

Level:4.50 Step:Originator Change		
Action Title	**Status**	**Next Level**
M Requested Changes Made	Launched	5.00
Messages/Positions		
		Add Action

Level Five: Curriculum Chair (Required)

At this point, the curriculum chair will have the option to send the curriculum back to the originator at 4.5 for changes or move it forward to another level. To see how to create these actions, review the steps and actions of the fourth level.

Final Step in the Approval Process

The final step in the process will remove the proposal from the approval process and implement the purpose of the selected workflow. In other words, the last step will do one of three things:

1) Activate approved curriculum if it is a new proposal
2) Activate revised curriculum and automatically archive old version and make them historical
3) Retire curriculum and update it to a historical status

Action: Implement
Course State: Approved
Next Level: Next Level
Completed Box: Checked

Action: Approve for Later Implementation
Course State: Approved
Next Level: Next Level
Completed Box: Checked

"Implement" is designed to immediately incorporate the curriculum while "Approved for Later Implementation" allows the position to select a date in the future to implement the curriculum.

<table>
<tr><td colspan="2" align="center">**Curriculum Specialist**</td></tr>
<tr><td>**Level**</td><td>10.00</td></tr>
<tr><td>**Type**</td><td>Required</td></tr>
<tr><td>**Days**</td><td>2.00</td></tr>
<tr><td>**Description**</td><td>Implement the curriculum.</td></tr>
<tr><td>**Position**</td><td>Curriculum Specialist</td></tr>
<tr><td>**Actions**</td><td>127 Implement   Status:Approved
121 Approved for Later Implementation Status:Approved</td></tr>
</table>

Level:10.00 Step:Curriculum Specialist		
Action Title	**Status**	**Next Level**
M Implement	Approved	Completed
Messages/Positions		
Action Title	**Status**	**Next Level**
M Approved for Later Implementation	Approved	Completed
Messages/Positions		
		Add Action

Modifying an Approval Process

Copying an Approval Process – Existing processes may be copied and renamed to be used for another process that requires a similar work flow (however, course workflows cannot be copied for programs, and vice versa). This saves time and minimizes errors.

To copy a workflow, go to the main approval process menu. Click on the copy icon next to the process that will be used as the template (Fig. 13). *Keep in mind that a new proposal type will have to be created before the approval process can be generated.* Enter in the new title and select the proposal type that was just created. Select the curriculum type and click "Save". Put the current date in the Version Title box. All of the steps and actions from the original workflow can now be edited to suit the purpose of the new process.

Updating an Approval Process – When an approval process needs to be modified but is currently in use, a **new version** can be constructed so the necessary changes can be made without interrupting the flow of proposals that are currently undergoing review. While in the approval process main menu, select the edit (pencil) icon of the process that needs to be updated. The "New Version" field will be displayed with the version number already populated (Fig. 14). Enter in the current date in the version title and select "Update". The new version can now be edited while courses or programs continue to use the older version until they have completely moved through the process. Any curriculum that is submitted to a workflow will go through the most recent version.

Major/Minor Changes – A new version of the approval process should be created if major changes (such as adding a new level/step or changing positions) are made. Minor changes (such as adding an action to a step or changing the name of the step) do not require creating a new version since it will not impact the actual flow of the process. Minor changes can be made on an active workflow.

Troubleshooting and Frequently Asked Questions

Proposals Caught in Limbo

"My proposal doesn't seem to be moving along through the approval process. What's wrong?"

There are several reasons why a proposal may be stalled in the approval process. Here are some of the most common issues:

Issue: The "Days" field on a step may be longer than you think.
Resolution: Change the "Days" to reflect a shorter and more appropriate time frame.

Issue: No one is assigned to a position while the proposal waits for someone to take action.
Resolution: Check the "Proposal Users Report" under "Reports" to make sure someone is assigned to that role for the proposal. (*See the resolution for "Improperly Assigned Emails"*)

Issue: The calendar has not been activated to allow a process to start moving.
Resolution: Go into "Calendar Activities" under "Look-up Data". Checkmarks denote active dates.

Issue: An action might not be connecting to the next step.
Resolution: Go through each action in every step to make sure the "Next Level" field is correctly linked to the proper step. It may also help to print out the visual representation of the approval process and draw out the connecting actions to make sure each step is accurate.

Issue: If there is only one step on a level, the step type must be "Required" (not "Optional").
Resolution: Go into each step and make sure the "Step Type" is always marked as "Required".

Issue: Version Discrepancies

Resolution: See *"Proposal is stuck between old and new versions of the approval process"*

Administrative Holds

"When two people on the same level have required actions, does it only take one approval to move the proposal to the next step? How can I make it so the proposal waits for the approval of both required positions before moving on?"

Resolution: If you are not careful, yes. If both positions are marked as "Required" and either of them approves their step and a numerical value is assigned in the "Next Level" field, the proposal will immediately move to that level without waiting for the approval of the other required position.

To avoid this, select "Next Level" in the "Next Level" drop down box in the action instead of a numerical value. When "Next Level" is selected for all of the required actions, the steps will wait until action has been taken for all of the required positions before the proposal moves on.

Numerical values are placed in the "Next Level" field for "Disapprovals". This allows the proposal to immediately move to the change step regardless of the action of the other approver.

"How is the administrative hold used?"

The Administrative Hold Step has two functions; the first of which deals with guaranteeing a specific amount of review time for the proposal. To do this, label the hold step as "Required" and specify the amount of days you would like the proposal to be held. Set the action to "Default" to move the process forward once the days expire. Be sure to mark the other required actions in that level to advance to "Next Level" so once they are completed; they will still wait for the guaranteed time in the hold step before moving on.

The second purpose of a hold step is as follows: An administrative hold is used when there are at least two required steps on a level followed by a change step that needs to be circumvented (due to the approval of the previous level - utilizing a numerical value as the next level would not allow the other required step to take action and using "Next Level" would unnecessarily move the proposal into the originator change step). The hold step must be inserted between these two levels. To move a proposal to an administrative hold, ensure the initial required step's "Next Level" field is set to "Next Level" and not a numerical value. When both required steps have approved the curriculum, the proposal will then move to the hold step. Set the administrative hold step type as "Required". Set the "Days" field to "1". Most institutions create a "Hold" position for the position. On the "Actions" side, set the action to "Default" and the "Next Level" field to the desired *numerical* value.

In short, this will allow the proposal to automatically bypass an originator change step since no changes are required. This configuration is only necessary when there are two required steps on a level before a change step. If there is only one required step on a level before an originator change step, there is no need for an administrative hold step since a numerical value can be used in the "Next Level" field.

Completed Too Soon

"It says my proposal has gone through the approval process and is completed but I know it's not. There are still steps at the end that aren't done."

When an approval process is created, there is a "Completed" box on each action that can be activated to remove the proposal from the approval process (either because it is finished or it has been completely rejected).

Resolution: Go to the "Edit Process" page and locate the last completed action in the approval process and see if the "Completed" box has been activated. If it has been activated and should not be, uncheck the box and save the action. This will remove the opportunity to complete the proposal prematurely.

Skipping Steps

"Why has my proposal skipped several steps in the process?"

When an administrator goes to the "My approvals" page and selects a role, they will be able to see all of the processes that require action based upon that position. They are also able to take action on any listed process at this point. However, if they take action on a step without first checking where the proposal is at in the process, they could potentially skip all previous steps.

Resolution: The proposal will have to be taken out of the process and resubmitted. To do this, go to "My Proposals" under "Track". All of your proposals should be listed here. Locate the proposal and select "Remove Proposal" and then "Remove Proposal Continue". Follow the resolution under "Location

of Removed Proposal". **When you remove a proposal from the approval process, keep in mind that you will lose all of your notes and dates.**

Location of Removed Proposal

"I removed my proposal from the approval process and now I don't know where it is."

When a proposal is removed from the approval process, it has been taken back to where it started.

Resolution: To locate the proposal, select either "Courses" or "Programs" under the "Build" section. The removed proposal should be located here with the "Submit" button reactivated. Once changes are made, the proposal can be reinserted into the approval process.

Missing Emails

"Why aren't we getting email notifications?"

An email is sent out to those who are involved in the approval process at every step along the way. This ensures organization, timeliness, and accountability. There may be a few things that may keep you from receiving notifications.

Resolution: 1) Check your trash and spam filter settings. Sometimes the notifications may be found there. If so, adjust your settings to allow you to receive email notifications. 2) Check your approval notifications. Go to "Notification" under "Prefs" and enter in the dates where you should have received email notification on the approval process. If you have not received any notifications when you should have, contact your CurricUNET representative to have the issue resolved.

Improperly Assigned Emails

"The email notifications are not going to the correct people."

An email is sent out to those who are involved in the approval process at every step along the way. This ensures organization, timeliness, and accountability. Some people may not be properly notified of their involvement due to incorrect position assignments.

Resolution: The wrong person may be assigned to a role. To check to see who should be receiving email notifications based upon roles, go to "Reports" under "Admin". Select [Proposal Users Report] and then the proposal you would like to view. This report will show each step, position, and each user assigned to that position. Make sure the proper users are assigned to the correct roles. You can also check to see what positions a user has been assigned by selecting "Users" under "Admin" and then the user. Select the "A" (approval functions). If improper functions have been assigned, they can be corrected by using the delete and/or create buttons.

There also additional tables in the Look-up Data showing a hierarchy of divisions, departments, and disciplines. Contact your CurricUNET representative for additional information in these areas.

Proposal is stuck between old and new versions of the approval process

"I updated the approval process while there were some courses/programs undergoing revision and now the proposal seems stuck."

At times, an administrator might update an approval process and inadvertently stop a proposal in the process by removing key steps or levels. For instance, if a process's next location is level five but level five has been removed, it will stay at level four indefinitely unless proper action is taken.

Resolution: To check to see if a proposal is caught between process versions, check the launch date of the proposal and the date the approval process was revised. If the launch date is before the version revision, the proposal needs to be removed from the process and submitted again. If not, check each of the resolutions under "Proposals Caught in Limbo".

Did they get notified?

"Users say they did not receive notifications. How can I tell if they have?"

As an administrator, you have the ability to see if users are receiving notifications. Users can also utilize this same process to see if they are receiving notifications or not.

Resolution: Check the approval notifications of the user. Log in as the user using "Users" → "Users Login" and then retrieve the user. Select "Login". Go to "Notification" under "Prefs" and enter in the dates where the user should have received email notifications on the approval process. The notifications will be displayed. If the user has not received any notifications when they should have, contact your CurricUNET representative to have the issue resolved.

Messages

"When an action has been taken, how can we notify all previous approval levels?"

Locate the action in the appropriate step. You will notice there is an "M" icon near the edit functions on the left side of the action display. Click on the "M" to open up the message function. From here, you can select the position you would like to notify and the message you would like to convey when that specific action is taken. You can add multiple messages per action. Messages can be added utilizing the Look-up Data.

Days Expire

"Are we essentially skipping a step when the days entered on a level expire and no action is taken?"

It depends. A proposal will only move to the next level if a default action is specified and the "days" have been fulfilled. The term "Default" must be selected as the action. If no default action is used and the days expire, a reminder email will be sent out each day to the required position until action has been taken. In this case, the proposal will not move forward until action has been taken.

Optional vs. Required

"If I have three people on a level where two are "approvers" and one is a "reviewer", are the approver's steps marked as "Required" while the reviewer is marked as "Optional"?

Yes. Keep in mind the approvers are the only positions that can move the process forward or backward so their step is marked as required. Since the reviewer is included for information purposes only, they are considered optional. To allow optional steps the ability to add comments on the proposal, make sure they are assigned an action such as "Reviewed".

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