Using Filters in the Curriculum Proposal System

Filters can be used to adjust the listing of proposals in the BPM Workspace. By default, the only proposals you will see in your Worklist are those in your “Inbox.” These would be:

- Proposals in the Originator Review Activity in your College.
- Proposals in University Wide Review
- Proposals that are in a Reviewing Activity that you are a member of (for example: Department Review, College Curriculum Committee, Distance Learning, etc).

However, you may just want to inquire on a proposal to see where it is in the overall Workflow Process and if it is not in one of the Activities above, you will not see it in your Inbox by default. Therefore, you will need to create a filter to retrieve the proposal and display it in your Inbox.

The next several pages will provide step by step instructions for the most common requests.

**Note:** Once a proposal has moved through the entire Workflow Process, it will no longer be retrievable in the Workspace. For completed proposals, you will need to go to the Proposal Archives.
**I want to see all of “MY” proposals, regardless of the Activity**

This filter will list all proposals that were created by a specified Originator. The Originator is the person who enters the proposal into the Curriculum Proposal System.

1. **Open the BPM Workspace:**

   ![BPM Workspace screenshot]

2. **Click on Show filters link:**

   ![Show filters screenshot]
3. Click on the **Select All Processes** arrows to select all available processes for the filter.

   ![Processes Frame](image)

4. Below the Processes frame, there is a Conditions frame:

   ![Conditions Frame](image)

5. In the first field, **Conditions**, use the dropdown to select the criteria for the filter. Select **Originator**.

   ![Originator Dropdown](image)

6. After a Condition is selected, click on the **Add condition** link.

   The Conditions fields are now available:

   ![Conditions Fields](image)

7. In the blank edit box, enter all or part of the name. The operator is “contains.” This can be adjusted to “begins with” or “is.”
8. For example:

9. Click on the **Apply Filter** button. The Worklist will update.

10. If this is a view that you would like to use multiple times, click on the **Save As View** button.

    Add a name for the view in the **Label** field. Click on the **Save** button.

11. To use this view, at a later time, use the **View** dropdown at the top of the Workspace and select the view from the list.

12. At any time, to return to the default Inbox, use the **View** dropdown again to select Inbox.
I want to see all proposals, regardless of the Activity, by a certain Author
This filter will list all proposals that were created by a specified Author. The Author is the person who creates the proposal outside of the Curriculum Proposal System.

1. Open the BPM Workspace:

2. Click on Show filters link:
3. Click on the Select All Processes arrows to select all available processes for the filter.

4. Below the Processes frame, there is a Conditions frame:

<table>
<thead>
<tr>
<th>Conditions:</th>
<th>Case sensitive</th>
<th>Match all conditions</th>
</tr>
</thead>
</table>

5. In the first field, Conditions, use the dropdown to select the criteria for the filter. Select Proposal Author.

6. After a Condition is selected, click on the Add condition link.

The Conditions fields are now available:

<table>
<thead>
<tr>
<th>Proposal Author</th>
<th>contains</th>
<th>Parametric</th>
</tr>
</thead>
</table>

7. In the blank edit box, enter all or part of the name. The operator is set at a default of “contains.” This can be adjusted to “begins with” or “is.”
8. For example:

![Proposal filter example]

9. Click on the **Apply Filter** button. The Worklist will update.

![Filtered worklist]

10. If this is a view that you would like to use multiple times, click on the **Save As View** button.

![Save view dialog]

Add a name for the view in the **Label** field. Click on the **Save** button.

11. To use this view, at a later time, use the **View** dropdown at the top of the Workspace and select the view from the list.

![View dropdown]

12. At any time, to return to the default Inbox, use the **View** dropdown again to select Inbox.
I want to see all proposals, regardless of the Activity, from a specified College
This filter will list all proposals that were created in a specific College, regardless of where the proposal is the Workflow Process.

1. Open the BPM Workspace:

   ![BPM Workspace Image]

2. Click on Show filters link:

   ![Show filters Image]
3. Click on the Select All Processes arrows to select all available processes for the filter.

![Processes](image)

4. Below the Processes frame, there is a Conditions frame:

   ![Conditions Dropdown](image)

5. In the first field, Conditions, use the dropdown to select the criteria for the filter. Select College Code.

6. After a Condition is selected, click on the Add condition link.

   The Conditions fields are now available:

   ![College Code Conditions](image)

7. In the blank edit box, enter all or part of the college code. The operator is set at a default of “contains.” This can be adjusted to “begins with” or “is.”
8. For example:

   ![College Codes Filter Example](image)

   College Codes:
   - EDUC
   - A&S
   - CHP
   - POLY
   - SUMM
   - HSHS
   - BUS
   - ENGR
   - PROV
   - SUMM
   - WAYN

9. Click on the **Apply Filter** button. The Worklist will update.

10. If this is a view that you would like to use multiple times, click on the **Save As View** button.

    Add a name for the view in the **Label** field. Click on the **Save** button.
11. To use this view, at a later time, use the View dropdown at the top of the Workspace and select the view from the list.

<table>
<thead>
<tr>
<th>View</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
<td></td>
</tr>
<tr>
<td>My College Proposals</td>
<td></td>
</tr>
<tr>
<td>My Proposals</td>
<td></td>
</tr>
</tbody>
</table>

12. At any time, to return to the default Inbox, use the View dropdown again to select Inbox.
I want to see all proposals, regardless of the Activity, from a specified Department

This filter will list all proposals that were created in a specific Department, regardless of where the proposal is the Workflow Process.

1. Open the BPM Workspace:

   ![BPM Workspace Image]

2. Click on Show filters link:

   ![Show filters Image]
3. Click on the **Select All Processes** arrows to select all available processes for the filter.

4. Below the Processes frame, there is a Conditions frame:

   ![Conditions Frame]

5. In the first field, **Conditions**, use the dropdown to select the criteria for the filter. Select **Department Code**.

6. After a Condition is selected, click on the **Add condition** link.

   The Conditions fields are now available:

   ![Department Code Field]

7. In the blank edit box, enter all or part of the college code. The operator is set at a default of “contains.” This can be adjusted to “begins with” or “is.”
8. For example:

![Department Code](image1.png)

The Department Code is a part of the Proposal Number (The Description column in the Inbox).

9. Click on the **Apply Filter** button. The Worklist will update.

10. If this is a view that you would like to use multiple times, click on the **Save As View** button.

   ![Save As View](image2.png)

   Add a name for the view in the **Label** field. Click on the **Save** button.

To open a proposal, use the drop down to select **Read Proposal**.
11. To use this view, at a later time, use the **View** dropdown at the top of the Workspace and select the view from the list.

12. At any time, to return to the default Inbox, use the **View** dropdown again to select Inbox.