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Lesson 1: Overview

CPS, or the Curriculum Proposal System, is an automated workflow system, based on the Oracle BPM Workflow Tool, which supports the academic approval process for curriculum proposals and performs many of the administrative steps in that process.

This manual is the Quick Start Version of the Curriculum Proposal System Reviews manual. This manual will focus on the basics of reviewing a proposal and does not focus on all the field details as well as the additional features that the system has to offer.
Workflow of a Proposal

Any new proposal that is entered into the system will need to follow a basic outline of steps, in order, to be in compliance with the Board of Trustee Guidelines. Each step must flow in the proper order, as outlined below, or the proposal process will be ended.

Adapted from Board of Trustee Guideline 3359-20-05.2

*Each College has a workflow built in as to how their College handles curriculum Reviews.
Lesson 2: System Basics

There are many roles involved with the Curriculum Proposal System so there are variances in how the system will be used. Some users will need to be able to navigate around and be able to create course and program proposals while others will need to be able to review proposals at different stages in the process.

Sign In

1. Open an Internet Browser and enter in the Address bar: http://www.uakron.edu/curriculum-proposal/

The Curriculum Proposal System landing page displays.

2. Click on the Launch Curriculum Proposal System link to log in.

Note: Archived Proposals will be outlined in a separate lesson.
3. Enter your **Username** and **Password** and click on the **Login** button. Use your UAnet ID and Password.

Your BPM Workspace will display.

**Note:** To logout of the Curriculum Proposal System, click on the **Logout** link in the top right corner of the window.
**BPM Workspace**

The Workspace is where you will start your working session with the Curriculum Proposal System. You can initiate many tasks from this page such as:

- Create a New Proposal
- Add or Review Attachments
- See the Activity (status) of a Proposal

**Note:** Do not use the Browser Back button. You will be logged out of the system.

---

**Create a new proposal**

**Proposal Details**

**Refresh the Work Items**

**The current Activity and a link to open the proposal**

**Proposal Type**

**Advance to next page of Proposals**

**Attachment**
Using Filters in the Curriculum Proposal System

Filters can be used to adjust the listing of proposals in the BPM Workspace. Furthermore, filters can help you locate proposals that may not automatically appear in your Inbox because they are in an Activity that you are not a member of.

Creating a Filter to see all proposals in a specified College:

1. Click on Show filters link.

2. Click on the Select All Processes arrows to select all available processes for the filter.

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

4. In the first field, Conditions, use the dropdown to select the criteria for the filter. Select Description.
5. Click on the **Add condition** link.

The Condition fields are now available:

![Condition fields](image)

The Description is the proposal number so you can search on any of the components of the number.

**BUS-MARKET-11-1608**

- College Code
- Department code
- Proposal Number

6. In the blank edit box, enter all or part of the College Code. This will list all proposals in the specified College, regardless of where they are in the Workflow Process.

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

If you want to be more specific in your search (limit the number of proposals that display) you can also use the Department Code or if you are looking for a specific proposal, the proposal number.

7. Click on the **Apply Filter** button. The Inbox will update.
8. If this is a filter that you would like to use multiple times, click on the save button.

![Save View As](image)

Enter a name for the View in the **Label** field and click on the **Save** button.

To use this saved view at a later time, use the **View** dropdown in the top left corner of the Inbox and select the name of the view you created.

9. To open a proposal, click on the link in the last column, which specifies the current Activity (i.e. Originator Review, Department Review, Faculty Review, Library Review, University Review, etc.).

To view a proposal, in an Activity that you are not a member of, click on the drop down arrow in the far right column for the proposal and select **Read Proposal**. You will not have a link to open the proposal in this type of situation.

![Select Action](image)

**Note**: Remember, you will only be able to open a proposal if it is in an Activity you are able to see based on your Role in the Curriculum Proposal System. If the proposal is listed, but there is not a link in the last column, this could mean that you are not able to open the proposal at that current Activity and you are just able to see that it is in the system and at what Review (Activity) the proposal is currently at.
Opening a Proposal in Read Only Mode

If another user has the proposal open, you cannot open the proposal in a way that will allow you to take any kind of action. Also, remember that you can only open proposals for edits if you are a member of the current Activity. You can, however, open the proposal in a Read Only mode at any time, which will still allow you to open and read about the selected proposal.

1. In the BPM Workspace, you will know a proposal is opened by another user, if there is not a link in the last column.

2. Click on the drop down arrow, in the far right, in the last column (to the right of Select action).
3. Select the option for **Read Proposal**.

4. The proposal opens in Read Only Mode and this is indicated at the top of the page, centered below the proposal number.

   Remember, in this mode, you are unable to do any kind of update to the proposal (comments, objections, updating status).
Attachments

Attached Files

There are different files that need to be submitted for proposals. For example, a course outline or class syllabus needs to be attached for certain proposals. Adding attachments is done before the proposal is submitted.

Note: Attachments should follow a naming convention for the type of attachment. This will help the Curriculum Proposal system track and organize attachments in the most efficient way.

For example:

- **(Course Proposals) Course Outline**: courseoutline.doc(x)
- **(Course Proposals) New Online Syllabus**: syllabus.doc(x)
- **(Course Proposals) Traditional Syllabus**: traditionalsyllabus.doc(x)
- **(Program Proposals) Faculty Matrix**: facultymatrix.xls(x)
- **(Program Proposals) Activities Matrix**: activitiesmatrix.xls(x)
- **(Program Proposals) Curriculum Vitae**: facultyCV_lastnamefirstinitial.doc(x)

Note: These files can be in other formats such as PDF. However, the actual file name should be as underlined above.
Method 1: Reviewing Attachments on Proposal Tabs

1. Open the proposal.

2. To review an attachment, go to the bottom of any tab and look for the Attachments frame.

3. In the Open an existing attachment frame, locate the attachment that you want to open for review.

4. Click on the Open button for the file.

5. The file opens in a new window.
Method 2: Reviewing Attachments in the BPM Workspace

1. Go to the BPM Workspace.

2. Select the proposal from the Work Items. The proposals that have attachments are identified with the Attachment button. To do this, click on the proposal in the Description column to active it. The row will highlight in a light blue color.

The Work Item Detail frame, at the bottom of the window, will now display some data for the selected proposal.

3. Click on the Attachments tab. In this example, there is only one attachment.
4. After you click on the **Attachments** tab, the file(s) will be listed:

![Attachments Tab](image1.png)

5. To open the file, click on the link for the file in the **Filename** column.

![Filename](image2.png)

**Note**: The **OK** button closes the dialogue box and returns you to the BPM Workspace.

6. Click on the **Download** button.

**Note**: A message may display at the top of the window stating that the download was blocked.

![Download Button](image3.png)
If this occurs, click on the message bar with the mouse and a short menu displays:

Select the option for Download File, return to Step 5 and continue.

7. In the File Download box, select Open.

8. The file will open in the resident program.

Note: See Appendix A for more information about Internet Settings.
Lesson 3: Reviewing a Proposal

Reviewing a proposal in the Curriculum Proposal System starts at the College Review Activity. Each College has a slightly different workflow within their college. See Appendix G for details.

As a Reviewer, in the Curriculum Proposal System, you will be responsible for reviewing the proposal and taking action. There are many levels of reviews in the proposal process. Refer to the Workflow chart on page 4 for details. The Activity defines where the proposal is in the proposal process.

Some of the values you may see for Activity are:

- College Approval (See Appendix G)
- Library Review
- IR Review
- URC Review
- GRC Review
- DLRC Review
- GEAC Review
- TAG Review
- University Review
- FS Review
- Update Graduate Bulletin
- Update Course Catalog
- PeopleSoft Review
- DARS Review

Notifications

Throughout the workflow process, e-mail messages are sent out to the Reviewing Bodies. These e-mail messages serve as a notification to the Reviewers that a proposal is ready to be reviewed.
5 Steps for Reviewers

1. Open the Proposal
   - An e-mail notification will be sent to let you know that a proposal is waiting your review.

2. Review the Proposal via the Proposal tabs. Be sure to review any notes on the Comment tab. Also, review any attachments found in Attachments frame at the bottom of each tab. Use Read Only Mode if another User already has the proposal open.

3. Comments can be added for information you want to be part of the proposal. (Optional)
   - An e-mail notification will be sent to the Originator each time a new Comment is added.
   - Comments can be added to a proposal at any point in the proposal process.

4. Objections added -For University Wide Reviewers only (Optional)
   - A formal objection that affects the Workflow of the proposal.

5. Take Action and Submit

   For Triggers:
   - **In College Approvals**: Approve or Recommend Change
   - **In Library Review**: Approve or Recommend Change
   - **In IR Review**: Approve or Recommend Change
   - **In URC Review**: Approve or Recommend Change
   - **In GRC Review**: Approve or Recommend Change
   - **DLRC**: Approve or Recommend Change
   - **GEAC**: Approve or Recommend Change
   - **TAG**: Approve or Recommend Change
   - **In University Review**: (no status available, only comments and objection can be entered)
   - **In FS Review**: Approve or Reject
Open a Proposal for Review

1. Go to the BPM Workspace.

2. You need to open the Proposal that you are to review. Click on the Activity link, to the far right in the Work Items frame as circled in the screen above.

The status will be different, depending on where the proposal is in the reviewing process. Some of the values you may see, depending on your Reviewing Role, are:

- Department Review
- School Review
- Faculty Review
- Dean Review
- Library Review
- IR Review
- URC Review
- GRC Review
- DLRC Review
- GEAC Review
- TAG Review
- University Review
- FS Review
- Update Graduate Bulletin
- Update Course Catalog
- PeopleSoft Review
- DARS Review

**Note:** If another user has the proposal open, you will see the proposal listed, but you will not have a link for the Activity. You will need to open the proposal in “Read Only” mode to review the proposal at that time. Comments cannot be added when in Read Only Mode.
3. The proposal will open in a new window, therefore, leaving the BPM Workspace open in the original window.

For example, if you are reviewing a course proposal, a page similar to the following will display.
Review the Proposal

1. Review the proposal by clicking on the tabs that are active.

   The active tab is yellow and the light blue tabs are those that are pertinent to this proposal. Tabs that are in a darker blue shade do not apply to this proposal or to this proposal at the current Activity.

2. Be sure to review any notes on the Comments tab while reviewing the proposal.

3. Review any attachments by clicking on the Open button in the Attachment frame (at the bottom of each tab).

Add Comments to the Proposal (Optional)

Comments can be added to a proposal at any point in the proposal process. When a comment is entered into the system, an e-mail notification is sent to the Originator. Comments cannot be added in Read Only Mode.

1. If you need to add comments to a proposal, click on the Comments tab.

   ![Comments Tab](image)

   Please enter comments regarding this proposal here.

   Your comments will be emailed to Landis, Laura L, Landis, Laura L and the Polymer Engineering department representative.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Comment</th>
<th>Action</th>
</tr>
</thead>
</table>

2. In the large edit box, enter the comment for the proposal.
3. Click on the Add button in the Action column.

4. The Comments will be listed above the edit box for all proposal Reviewers to see.
Adding an Objection to a Proposal (Optional)

An objection is a formal statement that affects the Workflow of the proposal. **Objections can only be added at University Wide Review (UWR.)** The Objections tab is not active at other levels of review.

Objections are considered appropriate if they raise issues of duplication of content; appropriateness of the initiating unit; questions of academic quality (only appropriate if initiated within the originating academic unit); and it is demonstrated that the proposal adversely affects another program.

1. Click on the **Objections** tab.

2. Enter your objection in the large edit box, using formatting as desired.

3. Click on the **Add** button.

The objection will now be listed above the edit box.

4. If you need to remove your objection, click on the **Remove** button. You can only remove your objection during the current session. If you close the proposal and return, you will no longer be able to use the Remove button.
Take Action

After a Reviewer has reviewed the proposal and made any necessary comments or logged in an objection, they will need to take action. The Reviewer will do one of three tasks:

1. If the Reviewer is a Trigger and they want to move it forward in the process, they will select a Status and use the Submit button. (A Trigger is an assigned role in the Curriculum Proposal System and those that have this role have the ability to move the proposal to the next step in the Workflow Process.)

2. Do nothing. The Reviewer made no comments or objections and is not a Trigger. Therefore, the Save/Close button would be used.

3. If the Reviewer adds and Comment or Objection, the Save/Close button is used.

Note: Remember that many users will need to take no action after their review of the proposal. Only “Triggers” (those established in the system as those that can move a proposal forward, typically a Committee Head, Department Chair or key Staff member) are able to move a proposal to another step in the process. Therefore, if you are part of a Reviewing Body and you are not the Trigger, you can simply close the proposal by using the Save/Close button.
For Triggers- Moving Proposal to Next Step

1. At the top right of the window, below the four buttons, there is a **Current Status** field.

   ![Current Status Field](image)

   Use the drop down to select the next step for this proposal. For example:

   - **In College Reviews**: Approve or Recommend Change
   - **In Library Review**: Approve or Recommend Change
   - **In IR Review**: Approve or Recommend Change
   - **In URC Review**: Approve or Recommend Change
   - **In GRC Review**: Approve or Recommend Change
   - **DLRC**: Approve or Recommend Change
   - **GEAC**: Approve or Recommend Change
   - **TAG**: Approve or Recommend Change
   - **In University Review**: (no status available, only comments and objection can be entered)
   - **In FS Review**: Approve or Reject
   - **Update Graduate Bulletin, Update Course Catalog, PeopleSoft Review, DARS Review**: (no status available, just Submit to remove from Workspace)

2. After you select the status, you must click on the **Submit** button to move the proposal to the next step in the process.

   **Note**: In University Wide Review, there are no Triggers. Therefore, the Status field is not available.
For All Other Reviewers – NOT moving proposal to next step

1. After the review of the proposal, regardless if comments or objections were added, click on the Save/Close button.

2. If Comments or Objections were made, click on the Yes button.

3. If NO Comments or Objections were made, click on the No button.
Lesson 4: UCM – Proposal Archives

Proposals will be in the Archive once they have completed the workflow process, have been rejected, or at the point when a proposal has been withdrawn from the Curriculum Proposal System. Proposals that were entered into the New Curriculum Proposal System will be in the **Feb 14th, 2011-Present** area and any proposal entered in the old system can be found in the **1999-February 14th, 2011** area.

Accessing the UCM

1. Open an Internet Browser and enter in the Address bar: [http://www.uakron.edu/curriculum-proposal/](http://www.uakron.edu/curriculum-proposal/)

   ![Curriculum Proposal System](image)

   The Curriculum Proposal System landing page displays.

2. Click on the link for **Feb. 14th, 2011 - Present** which will allow you to search for proposals in the new Curriculum Proposal System.

   **Note:** To locate proposals located in the old system, you can click on the link for **1999 - Feb 14th, 2011**.
Open an Archived Proposal

Open an Archived Proposal

1. Click on the link, under Archived Proposals for **Feb 14th, 2011- Present**.

2. You can use key words to narrow the search. In the search field, attached to the Quick Search button (in the top right corner of window), enter a keyword such as:

   - If you know the Originator? Enter the first name of the person.
   - Do you know the College? Enter the abbreviation of the college, for example: A&S, BUS, POLY, WAYN
   - Do you know the proposal number (or the last 4 digits)?

3. After you enter criteria in the field, click on the **Quick Search** button.
Note:

Note the **Title** of the entries. The Proposal Report is the pdf of the proposal and you will also see items such as facultymatrix (Faculty Matrix), syllabus, facultyCV_LastNameFirstInitial (Faculty Curriculum Vitae), etc. These are the names of the files that were attached during the proposal entry. If you see “Other” this means, the Originator did not use the proper naming convention for the file when attaching it to the proposal. You will have to open the attachment to determine what information it is providing.

4. Click on the link in the **ID** column to open the file.
Appendix A: Internet Settings

Internet Explorer Setting

You will need to make a setting adjustment in order for attachments to be used in the most efficient manner. If you do not make this setting change, additional steps need to be taken. This process only needs to be completed ONCE.

1. Open Internet Explorer.

2. Select **Tools, Internet Options**.

![Internet Options settings menu](image)
3. Click on the **Security** tab.

![Security tab](image)

4. Click on the **Custom Level** button.

![Custom Level button](image)

Scroll down to the **Downloads** area.
5. Under, **Automatic prompting for file downloads**, select the radio button for Enable.

6. Click on the **OK** button.

![Warning dialog](image)

7. Click on the **Yes** button.

8. Click on the **OK** to close the Internet Options box.
Pop-up Blocker in Firefox

If you are using Mozilla Firefox as your Internet Browser, you will need to make a setting change to allow for pop-up from The University of Akron’s website. You only need to do this one time. If you do not allow for this setting, proposal pages will not display.

1. Open Firefox.

2. From the menu select Tool, Options. Click on the Contents tab.

3. Click on the Exceptions button to the right of the Block pop-up windows checkbox.
4. The Allowed Sites - Pop-ups box displays.

5. In the **Address of web site** field enter: uakron.edu Then, click on the Allow button.

6. In the **Address of web site** field enter: uanet.edu Then, click on the Allow button.

7. Click on the **Close** button.

8. Click on the **OK** to close the Options box.
Appendix B: College Workflows

*Arts & Sciences

**Department Review**
*Actions*: Recommend Change (goes back to Originator) or Recommend Approve (2 weeks)

**College CRC Review**
*Actions*: Recommend Change (goes back to Originator) or Recommend Approve (2 weeks)

**BCC Review**
*Actions*: Recommend Change (goes back to Originator) or Recommend Approve (2 weeks)

**College Review (Dean)**
*Actions*: Recommend Change (goes back to Originator) or Recommend Approve (2 weeks)

**Institutional Reviews**
*College of Business Workflow*

**Department Review**
*Actions*: Recommend Change
(goes back to Originator) or
Recommend Approve

**Undergraduate or Graduate**
**CCC Review**
*Actions*: Recommend Change
(goes back to Originator) or
Recommend Approve

**Undergraduate or Graduate**
**Faculty Review**
*Actions*: Recommend Change
(goes back to Originator) or
Approve

**College Review (Dean)**
*Actions*: Recommend Change
(goes back to Originator) or
Approve

**Institutional Reviews**
*College of Education Workflow*

- **Department Review**
  - **Actions**: Recommend Change (goes back to Originator) or Approve
  - (2 week notification cycle)

- **Dean Review**
  - **Actions**: Recommend Change (goes back to Originator) or Approve
  - (2 week notification cycle)

- **Undergrad or Grad CRC Review**
  - **Actions**: Recommend Change (go back to Originator) or Approve

- **College Council Review**
  - **Actions**: Recommend Change (go back to Originator) or Approve
  - (2 week notification cycle)

- **Final College Release**
  - **Action**: Approve or Recommend Change (go back to Originator)

- **Institutional Reviews**
*College of Engineering Workflow*

```
College Review

**Department Review**
*Actions*: Recommend Change  
(goes back to Originator) or  
Approve

**UCC or GCC Review**
*Actions*: Recommend Change  
(goes back to Originator) or  
Approve

**Faculty Review**
*Actions*: Recommend Change  
(goes back to Originator) or  
Approve

**College Review (Dean)**
*Actions*: Recommend Change  
(goes back to Originator) or  
Approve

**Institutional Reviews**
```
*CHP Workflow

School Review

*Actions*: Recommend Change (goes back to Originator) or Approve (2 week reminder)

CC Review (Curriculum Committee)

*Actions*: Recommend Change (goes back to Originator) or Approve (2 week reminder)

College Review (Dean)

*Actions*: Recommend Change (goes back to Originator) or Approve (2 week reminder)

Institutional Reviews
*College of Polymer Science Workflow*

**Department CC Review**
*Actions:* Recommend Change (goes back to Originator) or Approve

**Department Faculty Review**
*Actions:* Recommend Change (goes back to Originator) or Approve

**College Faculty Review**
*Actions:* Recommend Change (goes back to Originator) or Approve

**Dean Review**
*Actions:* Recommend Change (goes back to Originator) or Approve

**Institutional Reviews**
*Summit College*

- **Department Review**
  - *Actions*: Recommend Change (goes back to Originator) or Approve

- **College CRC Review**
  - *Actions*: Recommend Change (goes back to Originator) or Approve

- **Faculty Review**
  - *Actions*: Recommend Change (goes back to Originator) or Approve

- **College Review**
  - *Actions*: Recommend Change (goes back to Originator) or Approve

- **Institutional Reviews**
*Wayne College Workflow*

- **Department Review**
  - Actions: Recommend Change (goes back to Originator) or Approve

- **CWG Review**
  - Actions: Recommend Change (goes back to Originator) or Approve

- **Faculty Review**
  - Actions: Recommend Change (goes back to Originator) or Approve

- **Institutional Reviews**
Appendix C: Workspace Tips

Customizing the Columns in the Work Items List

The default BPM Workspace view should be sufficient for your day to day use of the Curriculum Proposal System. You can, however, customize the columns as you see fit.

The columns in the Work Items frame can be rearranged to suit your needs. The column heading contains the name of the column and you will need this name to efficiently move (or remove) a column.

1. Click on the link for Add/Remove Columns.

2. In the right frame, Presentation Columns, you can see the current layout of the Work Items.
3. If you want to change the order of the columns (left to right), click on the header name to select it.

4. Use the up and down arrows to adjust the order.

5. You can also add or remove columns from the Work Items. If you want to remove a column from the view, select it from the Presentation Columns frame and use the left to move it to the left frame, Available Columns.

6. There may be some columns that are not in the Work Items view, by default, that may be very useful to you.

   Scroll through the list in the Available Columns and locate the column you want added to your BPM Workspace. Select it, by clicking one time on it.

7. Use the right arrow to move to the Presentations Column frame.

8. When you are finished making changes to the columns, click on the Save button.
Sorting Columns

There may be times when you have a lot of proposals in the Workspace. By default, the first ten proposals will be listed and the oldest is listed at the top. You can sort the columns so that you are able to quickly identify the newest proposals.

1. In the Work Items list, click on the column heading for Received. This turns on sorting. Click again to sort the list in the reverse order.

Note: You can sort the other columns as well. Click on the column header and the Work Items will be sorted by that column. For example, you can sort by Description to list the proposals by college.
Appendix D: Reviewer Outlines

Reviewer Outlines

College Approvals (see Appendix G)

- Open Proposal via BPM Workspace.
- Review Proposal and any corresponding attachments.
- Add any necessary notes on Comments tab.
- If you are a “Trigger,” select a status, Approve or Recommend Change and select the Submit button to move the Proposal to the next step in the Workflow.
- If you are not a “Trigger,” select the Save/Close button.

Note: CIP Code is REQUIRED before a proposal leaves the College. The proposal cannot be submitted without the CIP Code being entered.

Institutional Reviews (Library Review, IR Review, URC Review, GRC Review, DLRC, GEAC)

- Open Proposal via BPM Workspace.
- Review Proposal (including Comments tab) and any corresponding attachments.
- Add any necessary notes on Comments tab.
- Select a status, Approve or Recommend Change.
- Select the Submit button to move the Proposal to the next step in the Workflow.
- If you are not a “Trigger,” select the Save/Close button.
University Review

- Open Proposal via BPM Workspace.
- Review Proposal (including Comments tab) and any corresponding attachments.
- Add any necessary notes on Comments tab.
- Add any formal objections on the Objections tab.
- Select the Save/Close button. After two weeks, the proposal will automatically move to the next step in the Workflow.
Appendix E: Audit Trail

There may be times when you want to see when a person worked on a proposal or who has a proposal open. You can get general information about a proposal by using the Audit Trail.

1. In the BPM Workspace, select the proposal from the Work Items. To do this, click on the proposal in the Description column to active it. The row for the proposal that you selected will be highlighted in light blue once the proposal has been selected.

The Work Item Detail frame, at the bottom of the window, will now display some data for the selected proposal.

2. Click on the Audit Trail tab.
3. After you click on Audit Trail, additional information will display.

4. The Work Item Detail will now list the Activities for the proposal. If you want to find additional information at a certain Activity level, you can click on the Expand button to the left of the Activity.

5. The selected Activity will expand:

6. You can expand all Activity levels by clicking on the Expand all button.

**Note:** The column for Responsible can help you identify who has worked on the proposal, looked at the proposal, or who still has the proposal open.