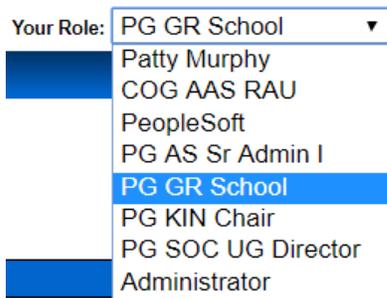


CIM PROGRAM MANAGEMENT INSTRUCTIONS:

Approving and Downloading Proposals for the UCC, Graduate Council, and Faculty Senate

Signing in to the CourseLeaf Console

- Go to <https://next-bulletin.miami.edu/courseleaf/approve/> or click on the link generated from the system email notification and sign in with your UM ID and password.
- Click the icon  to complete the log in.
- You will need to select **Your Role** from the drop down box at the top of the screen. This is not your name but the approval role you are in such as PG GR School, PG GR Council, PG FS Office for UCC, PG University Curriculum Committee, PG FS Office for GWC, PG FS GWC, PG Faculty Senate, or PG FS Office for President. (NOTE: All CIM program roles start with PG to differentiate them from CIM course and Catalog roles.)



- Once you select your role, you will see the list of proposals available for you as well as the name of the person who entered the proposal into CIM.

Pages Pending Approval

Filter List Refresh List Your Role: PG GR School

PAGE	USER
/programadmin/313: ACCT_MACC: Master of Science in Accountancy	Patty Murphy
/programadmin/309: FINL_MS: Master of Science in Finance	Patty Murphy
/programadmin/286: HLTH_MBA: Executive MBA in Health Management and Pc	Patty Murphy
/programadmin/253: IADM_MA; SECM_CN: M.A. in International Administration	Patty Murphy

- Click on the name of a proposal and it will automatically appear in the screen below the list.
- The top of the proposal indicates the type of proposal it is: New Program Proposal or Program Change Request (including Program Inactivation Proposal to close a program).

Program Change Request



- Simply scroll down to review the proposal.
- For Program Change Requests, additions to the currently approved program are noted in **green bold font** and deletions are noted in **red bold, strike-through font**.
- You can also click on course numbers to see the course descriptions or click on any attached documents to view them. Scroll all the way to the bottom of the screen to see the comments documenting the governance approvals and SACSCOC review requirements.

Reviewer: Charles Mason (c.mason2) (01/08/20 4:01 pm): The Music Theory and Composition Department met on August 16, at 2:00. At that time, the faculty discussed and approved the changes in requirements for the MM degree in Composition

- On the righthand side of the proposal you can see the approval workflow. Approvals are noted in **bold green font** and **bold orange font** denotes the current location in the workflow.

In Workflow

1. PG MTC Chair
2. PG MU GR Sr Admin I
3. PG MU Dean
4. PG Assessment and Accreditation
5. PG GR School
6. PG Graduate Council
7. PG GR Dean
8. PG FS Office for GWC
9. PG FS GWC
10. PG Faculty Senate
11. PG FS Office for President
12. PG Registrar

- Below the workflow is the documented approvals with the user name, approval role, and date noted. For department chairs and deans, these constitute their electronic signatures of approval.

Approval Path

1. 01/08/20 4:01 pm
Charles Mason
(c.mason2):
Approved for PG
MTC Chair
2. 01/08/20 4:37 pm
Shannon de l'Etoile
(skd3): Approved fr
PG MU GR Sr Admi
I
3. 01/09/20 8:58 am
Shelton Berg
(s.berg): Approved
for PG MU Dean
4. 01/13/20 9:16 am
Patty Murphy
(pxm491): Approve
for PG Assessment
and Accreditation

- If there are documents attached to the file that you would like to download to attach to the proposal, click on the **Attached Files** tab in the white box at the top right and of the console screen.



- Click on the link of each file and then press the downward arrow to download it and press save to save it.
- Then merge the proposal and attachment files together.
- Once you're done, simply close the console window to logout.

Moving Proposals Forward to Governing Bodies

To facilitate the tracking of where proposals are in the governance approval process, we have created the following roles:

PG GR School: This is the administrative role for proposals that need to be reviewed by the Graduate Council. It is essentially the inbox for the Graduate Council proposals. All proposals will be submitted first to this role. After the proposal submission deadline, the Graduate School staff can sign in, review the proposals to determine if they are ready to move forward and if so, click the green **Approve** button. This "approve" button is not an official approval but rather moving it forward in the workflow. All official approvals will be noted by adding a comment to the proposal.

PG Graduate Council: Once the Graduate Council has approved a proposal, the Graduate School staff will sign into the console, click the green

Add Comment button. A text box will appear.

They will then type in a sentence about the date of the approval as would be included in the Dean's

letter in the past and press the gray **Save** button. The comment will be recorded at the bottom of the proposal with the user name and date. Then they

Downloading Proposals

- At the top lefthand side of the proposal click the **Export to PDF** button.
- Click the down arrow to download the file.
- Choose the destination to save it to, enter the name of the file, and save it. Close the file.

will press the green  button so that the Graduate School Dean can approve it.

PG GR Dean: Once the Graduate Council has approved a proposal, the Graduate School Dean will sign into the console and press the green  button to move the proposal forward to the Faculty Senate. This will serve as his electronic signature in lieu of a letter of support.

PG FS Office for UCC: This is the administrative role for proposals that need to be reviewed by the University Curriculum Committee. All undergraduate proposals will be submitted first to this role. After the proposal submission deadline, the Faculty Senate Office staff can sign in, review the proposals to determine if they are ready to move forward. If so, they can follow the download instructions in the previous sections to create pdfs and send them to the UCC Chair. Once they've

done that, they click the green  button. This “approve” button is not an official approval but rather moving it forward in the workflow. All official approvals will be noted by adding a comment to the proposal.

PG University Curriculum Committee: This role is to track proposals that are being reviewed by the UCC at its next meeting. Once the UCC has reviewed the proposals and made its recommendations, the Chair of the UCC (or his designee) will sign into the console, click the green  button. A text box will appear. He will then type in a sentence about the date the UCC reviewed the proposal and its recommendation (support as submitted, support with suggested changes, or do not support) and press the gray  button. The comment will be recorded at the bottom of the proposal with the user name and date. Then he will press the green  button to move the proposal forward to the Faculty Senate.

PG FS Office for GWC: This is the administrative role for proposals that need to be reviewed by the GWC and Faculty Senate. All proposals will be submitted first to this role. After the proposal submission deadline, the Faculty Senate Office staff can sign in, review the proposals to determine if they are ready to move forward and if so, click the

green  button. This “approve” button is not an official approval but rather moving it forward in the workflow. All official approvals will be noted by adding a comment to the proposal.

PG FS GWC: This role is to track proposals that are being reviewed by the GWC at its next meeting. When the GWC is ready to move the proposal onto the agenda of the next Faculty Senate meeting, the Faculty Senate Office staff will sign into this role and click the green  button.

PG Faculty Senate: Once the GWC has moved a proposal onto the agenda for the next Faculty Senate meeting, it will appear in this role.

For Notification Items:

When a proposal has been accepted by the Faculty Senate as a notification item, the Faculty Senate Office staff will sign into the console, click the green  button. A text box will appear. They will then type in a comment stating that this was a notification item and the date of the FS meeting, then press the gray  button. The comment will be recorded at the bottom of the proposal with the user name and date.

For Approvals:

When the Faculty Senate has approved a proposal, the Faculty Senate Office staff will sign into the console, click the green  button. A text box will appear. They will then type in a about the date of the approval including the legislation number and press the gray  button. The comment will be recorded at the bottom of the proposal with the user name and date. Then they will press the green  button to move the proposal forward for the President's approval.

PG FS President Approval:

For Notification Items:

The Faculty Senate Office staff will need to email Patty Murphy to let her know which proposals are notifications so that the workflow can be manually changes to remove the need for the President's approval.

For Approvals:

The Faculty Senate Office staff will submit the legislation to the President's office for approval outside of the CIM system. When the Faculty Senate Office receives the legislation back from the President, the Faculty Senate Office staff will click

the green **Add Comment** button. A text box will appear. They will then type in a comment about the date the President approved it and press the gray **Save** button. The comment will be recorded at the bottom of the proposal with the user name and

date. Then they will press the green **Approve** button to move the proposal forward to the next step in the workflow which is usually the Registrar's Office for final processing and publication in the next Academic Bulletin unless notification to, or approval from, SACSCOC is required prior to implementation.

FYI Notifications: Proposal initiators (the people who submit the proposal in the CIM system, not necessarily the true proposer) will automatically get email notifications from the system at various stages in the workflow (such as when the Graduate Council, UCC, Faculty Senate, and President approve the proposal). The system administrators (Patty Murphy, Jenny Vargas) can add additional users to receive notifications as requested. They can only view the proposals, they cannot change them.

Editing Proposals Prior to Approval

If, after reviewing a submitted proposal, you determine that information needs to be added or revised, you can directly edit the proposal.

- Click the blue **Edit** button.
- A new window will open up with the proposal.
- Make the changes or if you prefer, you can request a document (such as an additional letter of support) and attach it to the proposal.
- To attach as supporting document, scroll down to the bottom of the proposal to the **Documents** section.
- Click the green **Attach File** button
- Locate the file on your computer and press the **Open** button.

- Scroll down to the bottom of the proposal and click the gray **Save Changes** button to finish editing the form.
- Then click the green **Approve** button to move it forward (adding a comment if required by the governance workflow as described in the previous section).

NOTE: Once a proposal is in the approval workflow, CIM saves the versions of the proposal if changes are made. To view changes made by a user, click on the drop down box in the blue bar at the top of the proposal and select the user. Then scroll down to review the changes made by that user.



Rolling Back a Proposal

If, after reviewing a submitted proposal, you determine that the proposal needs to go back to an earlier stage in the approval process or the proposer decides to withdraw the proposal, you can roll it back.

- Click the red **Rollback** button.
- A pop-up box will appear called the Rollback Page.
- Select the role you want to send it back to from in the top box.
- Then add a comment/reason in the bottom box. This is required.
- Click the gray rollback button.

Rollback Page

Rollback to:

Shannon de l'Etoile

PG MTC Chair

PG MU GR Sr Admin I

PG MU Dean

PG Assessment and Accreditation

Comment/Reason:

This proposal has been withdrawn at the initiator's request.

Rollback Cancel

NOTE: Once you roll a proposal back, it has to go through the approval workflow again from that point forward (the previous approvals will be wiped out of the system). So if you just need them to revise the proposal but that revision does not require re-approvals, then either use the Edit feature or contact Patty Murphy to change the CIM Workflow as needed to preserve the existing approvals.

The advantage of a proposer having the proposal rolled back is that the proposal is preserved in the system and can be reactivated at any point in time. However, a proposal can be completely deleted from the system if required. Contact Patty Murphy for assistance.