CIM PROGRAM MANAGEMENT INSTRUCTIONS:

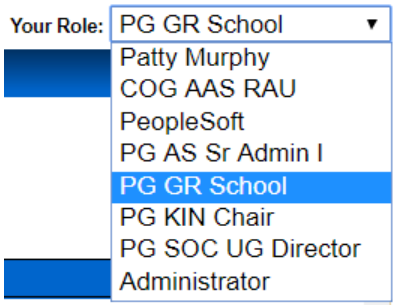
Approving and Downloading Proposals for the UCC, Graduate Council, and Faculty Senate

Signing in to the CourseLeaf Console

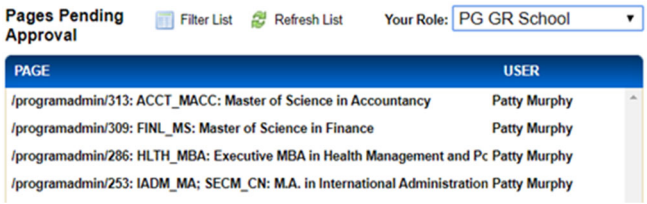
- Go to https://next-bulletin.miami.edu/courseleaf/approve/or click on the link generated from the system email notification and sign in with your UM ID and password.

- 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.)

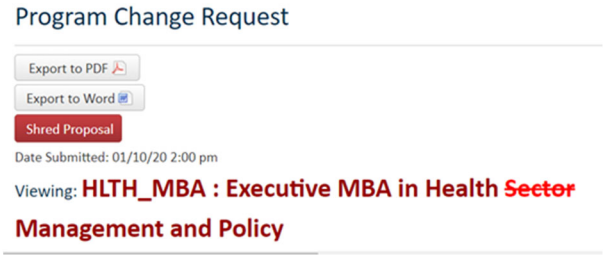


- Once you select your role, you will see the list of proposals available for you as well as the name of the person who entered the proposal into CIM.



- Click on the name of a proposal and it will automatically appear in the screen below the list.

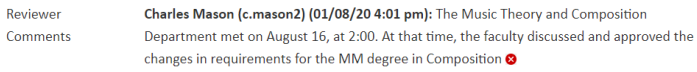
- The top of the proposal indicates the type of proposal it is: New Program Proposal or Program Change Request (including Program Inactivation Proposal to close a program).



- 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.



- 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 fo 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

NOTE: If a designee approves the proposal on behalf of the department chair/dean, then a signed letter of support is required as an attachment to the proposal. However, our goal with the electronic system is to minimize attachments as they create more work for reviewers as well as the Graduate School and Faculty Senate staff.

Downloading New Program 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.
- If there are documents attached to the file, you will now need to download those as well. To do so, 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.

Downloading Program Change Requests

IMPORTANT: There are many ways to print a proposal in CIM but this is the only way that will preserve the green and red font in Program Change Request which shows the changes being proposed.

- In the blue bar above the proposal, on the lefthand side of the screen, click the printer icon PAGE REVIEW .
- Choose the destination of Adobe PDF and color copy to save as a pdf and click the print button.
- Enter the name of the file and save it. Close the file.

- If there are documents attached to the file, you will now need to download those as well. To do so, 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.

NOTE: Our aim is to limit proposal attachments as much as possible to make the proposals easier for users to review. Instead of having the Department Chair, Dean, UCC Chair, Graduate School Dean submit letters with "wet" signatures to document governance approvals, they will now add comments denoting the dates of approval and their electronic signature will instead be their signing into CIM and pressing the approve button for the proposal.

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 will press the green Approve 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 Approve 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 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 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 Add Comment 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 Save button. The comment will be recorded at the bottom of the proposal with the user name and date. Then he will press the green Approve 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 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. When the Faculty Senate has approved it, 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 for President: This is the administrative role for proposals that need to be approved by the University President. The Faculty Senate Office staff will submit the legislation to the President's office for approval outside of the CIM system.

PG President Approved: When the Faculty Senate Office receives the legislation back from the President, the Faculty Senate Office staff will click the green button. A text box will appear. They will then type in a comment about the date the President approved it 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 to the Registrar's Office for final processing and publication in the next Academic Bulletin.

NOTE: Proposals will still be required to get Board of Trustee approval before they are officially approved but this will not be done through the CIM system as it would delay publication in the Academic Bulletin.

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.

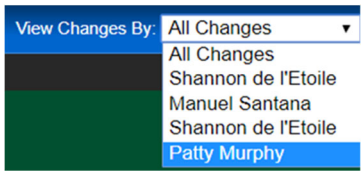
Editing Proposals Prior to Approval

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 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 button
- Locate the file on your computer and press the button.
- Scroll down to the bottom of the proposal and click the gray button to finish editing the form.
- Then click the green 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

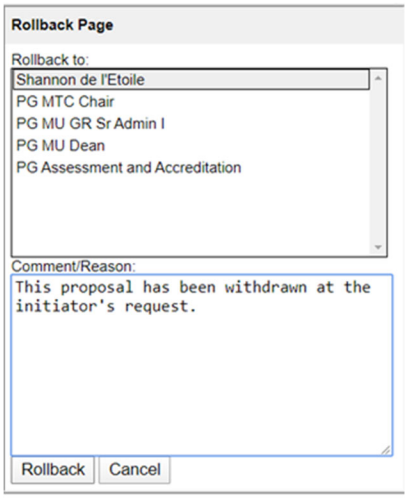
scroll down to review the changes made by that user.



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.



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.