

CIM PROGRAM MANAGEMENT INSTRUCTIONS:

Approving Academic Program Proposals with a College/School

PLEASE NOTE: By approving an academic program proposal in CIM, you are verifying that the faculty within the program, department, college or school have voted to approve the proposal as needed and that you, in your role as program director, department chair, school/college council speaker, or dean, support the proposal as well. Do not approve a proposal prior to the relevant faculty vote or without adding a comment indicating the date and result of the vote as well as your support for the proposal or it will not be submissible for the Graduate Council, UCC, or 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 KIN UG Director, PG KIN Chair, PG ED Sr Admin I, or PG ED Dean. (NOTE: All CIM program roles start with PG to differentiate them from CIM course and Catalog roles. These are sometimes followed by department/subject or school abbreviations)

Your Role:

- Patty Murphy
- COG AAS RAU
- PeopleSoft
- PG AS Sr Admin I
- PG GR School
- PG KIN Chair**
- PG SOC UG Director

- 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:

PAGE	USER
/programadmin/59: NEUR_BS,NEUP_AS_A: B.S. in Neuroscience	Helen Bramlett
/programadmin/30: SUST_CAS: Certificate in Sustainability	Maryann Tobin

- 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

Date Submitted: 01/10/20 2:00 pm

Viewing: **HLTH_MBA : Executive MBA in Health Sector Management and Policy**

- 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.
- 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 University Accreditation
2. PG ECS UG Director
3. PG AS Assoc Dean
4. PG AS Faculty
5. PG AS Dean
6. PG University Accreditation
7. PG FS Office for UCC
8. PG University Curriculum Committee
9. PG FS Office for GWC
10. PG FS GWC
11. PG Faculty Senate
12. PG FS for President
13. PG FS President Approved
14. PG Registrar

Approving Proposals

Once the relevant faculty have voted to approve a proposal, click the green **Add Comment** button. A text box will appear. Type in a sentence stating that the program/department/school faculty or council voted on [insert date] to approve the proposal. Department chairs and deans should also include a sentence stating that they support the proposal.

Press the gray **Save** button. The comment will be recorded at the bottom of the proposal with the user name and date. Then press the green **Approve** button. The proposal will then move forward to the next role in the approval workflow. The system will automatically generate an email to the person in that role.

If the proposal is not approved, you have two options. You can edit the proposal and then approve it or you can roll the proposal back to the person who submitted it or anyone other role prior to yours in the workflow.

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).

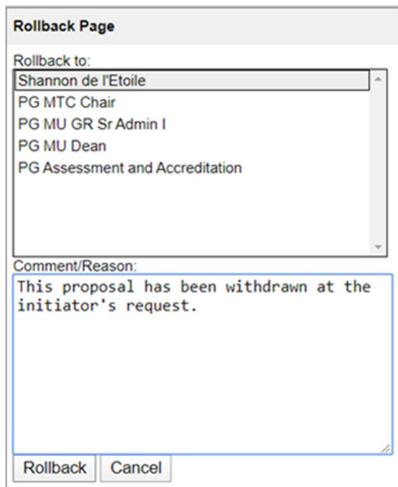
NOTE: Once a proposal is in the approval workflow, CIM saves the versions of the proposal if changes are made. To view changes made by a user, click on the drop down box in the blue bar at the top of the proposal and select the user. Then scroll down to review the changes made by that user.



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.



The screenshot shows a dialog box titled "Rollback Page". It contains a "Rollback to:" section with a list of roles: Shannon de l'Etoile, PG MTC Chair, PG MU GR Sr Admin I, PG MU Dean, and PG Assessment and Accreditation. Below this is a "Comment/Reason:" section with a text area containing the text: "This proposal has been withdrawn at the initiator's request." At the bottom of the dialog are two buttons: "Rollback" and "Cancel".

NOTE: Once you roll a proposal back, it has to go through the approval workflow again from that point forward because the existing 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 use the Edit feature instead or you can email Patty Murphy to change the workflow so that the changes can be made by another party and then move forward.

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 or Jenny Vargas for more information.