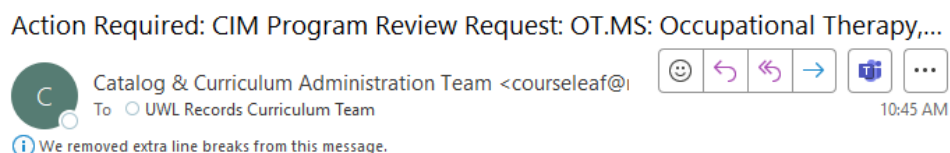# Using CIM as a Committee Chair

Each committee chair is given approver access in CIM based on their role. Roles are used as specific steps in the workflow.

If you are a new chair and are not able to access the approver page (see further down), contact the Records and Registration Office at curriculum@uwlax.edu. The Records Office must update access whenever a chair changes.

Important: Besides the below, the *UCC/GCC Guidelines for Reviewing CIM Proposals*, posted on the UCC and GCC website, was created by the committees and is intended to assist new & returning members for with reviewing the CIM forms. It may be helpful for new chairs as well.

Chair email notifications

When a committee is next in the workflow process, an email is automatically sent to that committee chair's email. An example email is shown below. The emails come from the Catalog & Curriculum Administration Team with the subject starting with **Action Required.** These emails notify the chair to include the proposal(s) on the next committee meeting agenda.

Action Required: CIM Program Review Request: OT.MS: Occupational Therapy,...

Catalog & Curriculum Administration Team <courseleaf@
To ○ UWL Records Curriculum Team
10:45 AM

ⓘ We removed extra line breaks from this message.

Caution: *External Email: Use caution responding, opening attachments, or clicking on links.*

Hi curriculum:

There is a pending program proposal awaiting your review:
OT.MS: Occupational Therapy, MS.

Please visit:
https://uwlnextcat.courseleaf.com/courseleaf/approve/?role=Registrar
to review the changes and provide your feedback.

This proposal needs your approval to move forward. Thus, your immediate action would be appreciated. Proposals must have Dean's office approval by noon of the Wednesday before the next curriculum meeting in order to be included on that meeting's agenda.

To help you plan, you may wish to check the "Preview Workflow" link on each proposal, located on the right hand side of the preview screen in CIM. This will show how many steps this proposal will need to go through before reaching the Dean's Office.

For questions regarding this email, please reply to curriculum@uwlax.edu or contact Amy Servais, 608-785-8954, or Jennifer Novak, 608-785-5046.

Records and Registration Curriculum Team:
Jennifer Novak
Amy Servais
Leanne Vigue

Depending on the committee, the chair may receive notifications for course, program, and/or policy proposals.

The Approver Page

Each **Action Required** email will include a link to the proposal in the **Approver Page**. Only those with the correct role can edit or take action on a proposal once its in workflow, and such changes must be done from the Approver Page.

If the email doesn't contain the link or can't be found, you can navigate to this page: https://uwlnextcat.courseleaf.com/courseleaf/approve/. This page is also linked on the CIM Approver webpage.

On the Approver Page, navigate to your specific role name in the drop-down menu. You will not be able to edit or approve proposals at other approver roles. Courses and programs are alphabetized together (courses by prefix and course number, and programs by program code), but courses are listed before programs.

After the committee has reviewed and acted on the proposal at the meeting, the chair selects the appropriate action from the Approver Page.

Navigating the Approver Page:
  A. **Your Role**: All course and program proposals at your approver step are listed under your role name. Select the proposal in the list, and the details will appear below.
  B. **Hide Changes/Show Changes:** Click on **Hide Changes** to see the proposal without the red/green markup that can sometimes be confusing. You can see how the proposal will look if all the changes are approved. Click on **Show Changes** to turn on the red/green changes again. Added information/requirements will be in green and underlined. Information being deleted will be in red.
  C. **View Changes By:** Allows you to see who made what comments/revisions. All approvers who have made edits will be included in this list. Selecting an individual name in the drop-down menu will filter comments/revisions based on user. The default setting is to see all changes.

Action Required: after the committee hears the proposal, the Chair has three options:
  D. **Edit**: Add revisions/edits made by the committee or document that the proposal is being held for a second read. A comment is required to explain the revisions and document any changes made on the floor. If a proposal is held for a second read, a comment should be added. The comment field appears in the edit window at the bottom of the form, or you may use the Add Comment (G) button instead.
  E. **Rollback**: Send form back to any past step in the workflow (i.e., the originator, the department chair, etc.).
      a. Appropriate to use if the committee did not approve the changes on the first read and is requesting the proposer to re-work the proposal. However, please when rolling back, the proposal must then go through all the workflow steps again from the returned point forward.
      b. May also use if the committee has rejected the proposal in its entirely.

   c. A comment is required with this option and will be included with the rollback email that is sent. The comment field is in the popup window where the past steps are shown.

F. Approve: Approve and send the proposal to the next step.

G. Add Comment: any comment added will be visible to everyone reviewing and saved on the form as part of the approval history.

Please note: if the chair does not select Approve or Rollback, the proposal will remain at their step.

Forms In Workflow: Once a course is in workflow, the approval steps will appear. The completed steps will be in green. The current step will be in brown/orange. Steps not yet completed will be black. The Approval Path showing the times and names of approvers will be below.

In Workflow
1. PHYDEPT Chair
2. CSH Academic Services Director
3. CSH Dean or Associate Dean
4. Registrar
5. Prep UCC
6. UCC Chair
7. Records Office
8. Prerequisite Review
9. Advisement Report Review
10. PeopleSoft

Approval Path

Edit Course

Preview Workflow

History
1. Mar 27, 2015 by David Anderson (danderson4)
2. Mar 16, 2016 by Constance Arzigian (carzigian)
3. Mar 10, 2018 by Constance Arzigian (carzigian)

History

Once a proposal is fully approved (gone through all workflow steps), a history of the change becomes available in the course preview. Click any of the dates to view what was changed in that revision. The history in CIM has revisions from 2015 to the present. For changes prior to 2015, copies may be in your department's office or contact Records & Registration for assistance.

Viewing other proposals not in workflow

All UWL courses and programs can be viewed in CIM at any time, along with proposals that are just starting to get edited or are anywhere in workflow. To view proposals outside of the approver page, login to one of the management screens using your UWL net ID and password, and search for the proposal.

Courses: https://uwlnextcat.courseleaf.com/courseadmin/
Programs: https://uwlnextcat.courseleaf.com/programadmin/

Searching: If you don't know the full name of the program, use an * before and after a significant word to find it. For courses, you can enter the subject, space, course number. More tips on searching can be found in the *Search for a Course* and *Search for a Program* guides posted on the UCC and GCC webpages.

Logging out

Close all windows of your browser to log out, or you will be logged out after 30 minutes of inactivity.

Questions? Additional guides can be found on http://www.uwlax.edu/records/faculty-staff-resources/curriculum-resources/, or contact the Records and Registration's Curriculum Team at curriculum@uwlax.edu.