

## APPROVING/REVIEWING PROPOSALS

### CourseLeaf (CIM) Workflow Overview – Both Programs and Courses

The CourseLeaf workflow is a tool used to move proposals through a specific approval path. Workflow for courses and programs must have at least 2 steps before the Provost Office step. Each step may be made up of specific users or roles that allow users to share a step. The workflow was set up to best mimic the previous (physical) approval flow for each department on campus. When approvals were sent through the mail it was possible to alter the workflow ad hoc, in the CIM a “best practice” workflow is in effect. In the CIM there are possibilities for departmental and college level roles, but they don’t all have to be filled.

#### CIM Access

Each college determines the access to the CIM. It is possible to give users access who are not members of any roles. The Dean’s Office in each college can direct you to the CIM manager for your college.

#### Workflow Engine

Workflow is generated when an author clicks the Start Workflow button. Change to workflow do not impact pages that are already in workflow. While an item is in workflow, it may continue to be edited by the last owner or approver until the next approver takes action. This allows the last person to make last second changes without requiring a rollback. The previous users will not be informed of these changes.

#### Rollback

Rollback is used to discuss changes or ask questions of previous approvers in workflow. Click Roll Back to send the page back to a previous editor. A prompt will appear to make comments about why the page is being rolled back. Make comments in the space provided and click Rollback in the new window.

#### Role Management/Workflow Rules

Each role (step) in workflow has a CourseLeaf standard naming convention due to the complexity of a workflow they have to be standard names. The CourseLeaf names might not be the familiar names we use on campus but they do correspond to roles within the college. For example, your department or college may have something called the Executive Committee, in CourseLeaf lingo this might be the College Committee. Each role name also uses the department or college (Banner) code as a replacement for the department or college name.

Examples of role names: 1538- Head (Department Chair for 1538 Animal Sciences); 1615- Committee (Department Committee for Aerospace Engineering); KY-Committee Chair (AHS College Executive Committee Chair)

Each step in workflow either reviews, or reviews and approves proposals. These functions follow the set-up of the role. Each approval role allows only one approval and then the proposal moves on to the next step in workflow. No approval action is required for review roles, these are usually committee members who would review the proposal in the CIM and be ready for the next meeting to discuss the proposal.

#### Managing Approvals

Approval roles generally have more than one person assigned, only **one person in an approval role can approve the proposal**. Individuals in an approval role must only be people with the title of the role, or individuals authorized to act on their behalf. If you are in an approval role with other people, discuss the process amongst yourselves and decide your process for review and approval for courses and programs. Only one person per approval role can approve a course or program, as it then goes to the next workflow step for approval. If you can’t find your proposal following the link in your email it is most likely that another member of your role has already approved.

#### Email Preferences

Email preferences can be set by the college. Email default is for all members to receive an email when a proposal is available for review or approval and when a course/program is fully approved. This can be set to one person only in each role. No matter the email setting all members have the same access and all members will receive an email when a proposal is fully approved.

## APPROVING/REVIEWING PROPOSALS

### CourseLeaf Emails

If you are in the CourseLeaf workflow for your college, you will receive an email when a proposal is available for review or approval and when a course/program is fully approved.

#### Email Key:

From: CourseLeaf Editor <[illinois@notify.courseleaf.com](mailto:illinois@notify.courseleaf.com)> 1

Subject: [CIM Courses] Review Course Changes: ABE 524: Autonomous Decision Making 1741 Committee 2 3

There have been proposed changes to the course ABE 524: Autonomous Decision Making.

You may review these changes by visiting:

<https://nextcourses.illinois.edu/courseadmin/?key=11302> 4

No approval is necessary; this is for your review only.

\*\*\*Note: if this is a course outside your department, you have received the notice because it is cross-listed in your department.\*\*\* 5

1. Email Action: The subject line indicates the necessary action: Review is usually for committee members, Approval Needed requires that role take action in the approval queue, Approved the course or program has been fully approved.
2. Course or Program name: The subject line indicates what program or course is in review or needs approval.
3. Role: The subject line indicates the intended role for this email.
4. The link takes you to the correct place for the indicated action.
5. Crosslist Note: The course listed in the subject line may not be in your department, but if your department has a course crosslisted with the subject course you will receive emails for the course.

For a **Review** Course/Program Changes email simply click on the link to review the proposal, **No approval is necessary.**

From: CourseLeaf Editor <[illinois@notify.courseleaf.com](mailto:illinois@notify.courseleaf.com)>  
Subject: [CIM Courses] Review Course Changes: ABE 524: Autonomous Decision Making 1741 Committee

For an **Approval Needed** email, action is required by one person in the role to move the proposal to the next step in the workflow. Click on the link in the email to review and then approve the proposal. (directions below)

From: CourseLeaf Editor <[illinois@notify.courseleaf.com](mailto:illinois@notify.courseleaf.com)>  
Subject: [CIM Programs]: Approval Needed for : Recreation, Sport and Tourism Minor at U Program Review

**You can also reach the approval page through this URL (only available to people in approval roles):**

<https://nextcourses.illinois.edu/courseleaf/approve/> Cut and paste this link to sign in with 2FA.

\*\*If you can't find your proposal following the link in your email it is most likely that another member of your role has already approved.

**All people in ALL roles** in the course/program workflow will receive an email when a proposal is **approved.**

From: CourseLeaf Editor <[illinois@notify.courseleaf.com](mailto:illinois@notify.courseleaf.com)>  
Subject: [CIM Course Approved] ARTH 402: Ways of Seeing in Edo Japan

# Course Inventory Management (CIM)

## APPROVING/REVIEWING PROPOSALS

### Viewing Course or Program History

To view the approved conditions click on the link in the email and then the Course/Program History for the appropriate date.

### History

1. [Jan 20, 2016 by Steve Herzog \(smherzog\)](#) This is a link

### Approving Proposals

#### Approval Queue Key:

The screenshot displays the 'Pages Pending Approval' section of the CIM system. At the top left, the text 'Pages Pending Approval' is circled in red with the number 1. To its right are 'Filter List' and 'Refresh List' buttons, with 'Refresh List' circled in red with the number 4. Further right is a 'Your Role:' dropdown menu set to 'Banner', circled in red with the number 3. Below this is a table with two columns: 'PAGE' and 'USER'. The first row shows '/courseadmin/11735: IS 491: Topics in Information Services' under 'PAGE' and 'Peggy Regan' under 'USER'. The second row shows '/courseadmin/12214: IS 499: Topics in Web Design & Development' under 'PAGE' and 'Peggy Regan' under 'USER', with the name circled in red with the number 5. The third row shows '/courseadmin/9082: TE 200: Introduction to Innovation' under 'PAGE' and 'Deb Forgacs' under 'USER'. Below the table is a 'PAGE REVIEW' section with 'Hide Changes' and 'View Changes By: All Changes' options. To the right are 'Edit', 'Rollback', and 'Approve' buttons, with 'Approve' circled in red with the number 6. Below this is a large red banner for a 'Course Change Request' circled in red with the number 2. Underneath the banner are buttons for 'Print Proposal', 'Print to PDF', and 'Shred Proposal'. To the right is an 'Add Comment' button. Below these buttons is the text 'Date Submitted: 04/30/20 8:41 am' and 'Viewing: IS 491 : Topics in Information Services'. To the right of this is an 'In Workflow' status indicator.

1. Use the **Pages Pending Approval** list (upper left) to select the proposal you want to review.
2. Once selected the Course or Program will appear in the **Page Review** section.
3. Your role will be in the **Your Role** drop down if you followed the Approval email link. If not, Click on the Your Role drop down to select your role.
  - a. Types of roles: Dept Committee, Dept Head, Gen Ed Board, Provost, Registrar. (Department numbers, i.e. 1257 for Math, are used in role names 1257 Committee, 1257 Head).
  - b. After you select a role, the list will be populated with pages that require your review, editing, or approval.
4. Click **Refresh List** to see if new pages have been added since your last visit or if the list doesn't contain an expected page.
5. The name of the initiator appears to the right of the **PAGE** name under **USER**.
6. Use the **Edit, Rollback and Approve** buttons for appropriate actions.

## APPROVING/REVIEWING PROPOSALS

### Explanation of Actions:

- **Edit the page:** Click **Edit** to make your own changes to the page. Once you edit the page, you may then approve the page to send it to the next step in the workflow.
- **Roll back the page:** Click **Roll Back** to send the page back to a previous editor/step in workflow. (picture below)

Rollback Page

Rollback to:

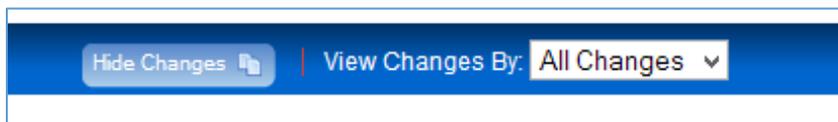
- Peggy Regan
- 1992 Head
- LP Dean
- Grad Dean
- COTE
- Provost
- Registrar

Comment/Reason:

When you do so, you are prompted to make comments about why you are sending the page back for changes. Make your comments in the space provided and click **Roll Back** in the new window. The document will roll back to the previous editor or any editor you select.

**Your comments will be part of the permanent record for this proposal.** They can be very simple and further discussion could be done in emails.

- **Approve:** Click **Approve** to send the page on to the next step in the workflow. **By selecting "approve," you are affirming that you have consulted with all appropriate parties at your level of governance involved in the proposal about its implications, including but not limited to staffing, space, and budget.**
- **Leave the page for another time:** You may also leave the page and come back to it another time. It will remain in your queue.
- **View Changes:** You can view changes made by editors who were before you in the workflow by selecting an item from the **View Changes** drop-down options. The selected editor's deletions are shown in red and the additions are shown in green. You can click hide changes to view the latest version of the document without color coding by clicking **Hide Changes**.



Use the page info/status window (upper right) to review basic page information, the workflow status of the selected page, attached files, etc.

## APPROVING/REVIEWING PROPOSALS

Page Info	<b>Workflow Status</b>	Attached Files	Revision History
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Completed:

Marlyna Schaefer, 1864 Courses Committee  
fyiall, 1864 Head, SLCL Courses Committee  
fyiall, SLCL Head

Pending:

KV Dean, Grad Dean, Provost, Registrar,  
Banner, Review fyiall, 1864 Notice fyiall, 1864  
Courses Committee fyiall, 1864 Head fyiall,  
SLCL Courses Committee fyiall, SLCL Head  
fyiall, KV Dean fyiall, Grad Dean fyiall, Registrar

Update Pending Workflow

Contact Deb Forgacs, Office of the Registrar for assistance at 217-265-9838 or [fms-catalog@illinois.edu](mailto:fms-catalog@illinois.edu).