

Records and Registration's CIM Guide for Various Committee Chairs/Members

Logging in

Faculty and staff can log into CIM using their user id and password to view proposals at any time. (Mozilla Firefox works best as a browser.) See **CIM: Logging In & Out**. Follow the below links to view the forms in the CIM course and program databases. You only have to login once for both links.

Courses: <https://uwlnextcat.courseleaf.com/courseadmin/>

Programs: <https://uwlnextcat.courseleaf.com/programadmin/>

Or go to the Records Curriculum Resources website and login there:

<http://www.uwlax.edu/records/faculty-staff-resources/curriculum-resources/>

The Process:

UWL has a variety of committees responsible for reviewing and taking action on proposed changes to the university's current curriculum and/or policies. The electronic workflow (CIM) was implemented to help keep track of these changes and keep a record of both the current and the past curriculum and policies.

Committee members view proposals through the CIM databases by logging into the databases linked above. Committee members review the proposals in preparation for their next meeting where they take action (approve, hold, reject) on the proposals. The individual committee Chairs record the committees' actions on behalf of the other members by going into CIM and approving or rolling back the proposal as appropriate.

If the committee approves a proposal, it moves on to the next step in workflow for the next approval committee/individual to review or onto the Records office for final processing and implementation.

I. Committee Chairs' role

Each committee chair has special access to approve CIM proposals in their "role" as committee chair. Roles are a specific step in workflow and are assigned to faculty or staff responsible for processing and/or approving proposals.

***Important:** contact the Records and Registration Office at curriculum@uwlax.edu when a committee chair changes. The Records Office must update access so the appropriate person receives the workflow emails and can approve proposals.*

A. CIM email notification:

When a committee is next in the workflow process, an email is automatically sent to that committee chair's UWL email. CIM emails will look similar to the one below and are sent by 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 ANT.M: Anthropology Minor



Catalog & Curriculum Administration Team <courseleaf@notify.courseleaf.com>

to me ▾

Susan:

There is a pending program proposals awaiting your review: ANT.M: Anthropology Minor.

Please visit:

<https://uwlnextcat.courseleaf.com/courseleaf/approve/?role=Advisement%20Report%20Role>
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.

For questions regarding this email, please reply to curriculum@uwlax.edu or contact Victoria Rahn, [608-785-8577](tel:608-785-8577), or Sue Knudson, [608-785-8954](tel:608-785-8954).

Records and Registration Curriculum Team:
Chris Bakkum
Sue Knudson
Victoria Rahn

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

After the committee has reviewed and made a decision on the proposal, the chair goes into the CIM Approval Page to record their action.

B. The Approval Page

Within each "Action Required" email, there will be a link to the proposal in the **Approval Page** screen. The Approval Page is separate from the Course and Program Management databases and is only accessible by approvers. **Approvers in workflow must go to this specific page in order to approve or rollback proposals.** Approving can't be done from the normal database pages. Login to the page using your UWL net ID and password.

If the email doesn't contain the link or is broken, you can find also your role in the dropdown menu of this page: <https://uwlnextcat.courseleaf.com/courseleaf/approve/>

On the Approve Pages screen, chairs will see all the proposals ready to be reviewed by the committee underneath his or her specific role in the drop down menu. Courses and programs are alphabetized together (courses by prefix and course number, and programs by program code), but courses are listed in numeric order before a program.

The screenshot displays the CourseLeaf interface. At the top, a 'Pages Pending Approval' table lists two proposals. A 'Page Info' box on the right provides details for the selected proposal. Below, the 'PAGE REVIEW' section shows a 'New Program Proposal' for the University of Wisconsin-La Crosse. It includes a 'Shred Proposal' button, submission date, viewing information, and an 'In Workflow' list with three steps: SAADEPT Chair, CLS College Academic Oversight Committee Chair, and CLS Assistant to the Dean. Yellow arrows labeled 1 through 4 and a-c point to specific UI elements: 1 points to the 'Your Role' dropdown, 2 to the 'Hide Changes' button, 3 to the 'View Changes By' dropdown, 4 to the 'Edit' button, and a, b, c to the 'Rollback' and 'Approve' buttons.

1. **Your Role:** all course and program proposals at that role in workflow will be listed. To view a proposal, simply click on the proposal name.
2. **Hide Changes/Show Changes:** click on “Hide Changes” to see the proposal in a “clean,” unmarked state. All red/green marks will be removed, and the proposal will show as it would look after being approved. Click on “Show Changes” to see all of the changes again. Added information/requirements will be in **green**. Information being deleted will be in **red**.
3. **View Changes By:** this drop down menu gives the options to see who made what comments/revisions. All approvers who have made edits will be included in this list. Selecting an option in the drop down menu will filtered comments/revisions based on user. The default setting is to see all changes.
4. **Action Required:** after the committee hears the proposal, the Chair has three options:
 - a. **Edit:** use this feature to enter revisions made by the committee. 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 stating that will be entered here.
 - b. **Rollback:** use this feature if the committee did not approve the changes and requested the proposer to re-work the proposal. The chair can roll back a proposal to any point in the past workflow (i.e., the originator, the department chair, etc.). However, please remember when choosing to rollback, the proposal will go through all the workflow steps again from the returned point forward. A comment is required with the rollback option which will be included with the rollback email that is sent.
 - c. **Approve:** if the committee passes the proposal, the chair approves and sends the proposal to the next step. If the proposal is held for a second read, a comment should be added using the Edit feature. The proposal remains in the committee chair’s queue either the Rollback or the Approve button is clicked.

Important: After the proposal is heard, and if it is approved, the chair must log in and click **Approve** from this screen in order for the proposal to continue on in workflow. If the Approve button is not clicked, the proposal remains stopped at this step.

II. Committee Members:

Committee members do not receive individual email notifications that proposals need reviewing. Instead, the chair should include it on the agenda (except for UCC & GCC where the Records office creates the agenda) and notify the members separately.

Once notified, committee members may login to CIM to review the proposal(s). They can't edit the proposal, but they can add comments if desired. These comments will be recorded with the proposed change and be visible to everyone.

Committee members can review proposals before the meeting in several ways:

1. One course (or program) proposal at a time using CIM:

- a. **Courses:** login using either the Course link above or the Course Form link on the Records website. At the search page, enter the individual course prefix/number and hit search. See **CIM: Searching for a Course**
- b. **Programs:** login using either the Program link above or the Program Form link on the Records website. Search by specific program title or a part of the title. For partial title searches, be sure to use an asterisk (*) before and after the work (e.g. *physics*) See **CIM: Searching for a Course**.

2. See all proposals sitting at a certain step in workflow (see examples on next page):

- a. Log into the appropriate database. Click **once** on the **Workflow** header at the main search page. This sorts the proposals by ascending workflow status. Clicking **twice** sorts by descending workflow and lists workflow items at the top. Scroll down to find where the UCC or GCC Curriculum Committee Chair is listed. (Mac users need to hover over the right side to find the scroll bar.)

Course search example:

UNIVERSITY of WISCONSIN
LA CROSSE

Course Inventory Management

Welcome to UW-L's curriculum inventory management (CIM) system. Use this tool to search edit, add, and deactivate courses.

The system can search by Course Code (the course prefix and/or catalog number) or by words in the Title. If searching by the title, use an asterisk (*) in the search box as a wildcard. For example, MATH* will find every course that starts with "MATH". *MATH will find every course title that ends with "MATH". *MATH* will find every course that has MATH included in the title. The Quick Searches function provides a list of predefined search categories to use.

If you have any questions, please contact the UW-L Curriculum Team at curriculum@uwlax.edu or call 785-8577.

Search - OR - Propose New Course Quick Searches...

Course Code	Title	Workflow	CIM Status	PS Status
ESS 729	Research Methods for Exercise and Sport Science	ESSDEPT Chair	Edited	A
ESS 735	Statistics for Exercise and Sport Science	ESSDEPT Chair	Edited	A
SOC 261	Technology in Society	Gen Ed Committee Chair	Edited	A
GEO 390	Geographic Field Methods	GEODEPT Chair	Edited	A
PUB 399	Special Topics in Public Administration	Peoplesoft	Edited	A
PUB 451	Civic Engagement and the Wisconsin Idea	Peoplesoft	Edited	A
PUB 344	Health Administration	Peoplesoft	Edited	A

Program search example:

The screenshot shows the 'Program Management' interface for the University of Wisconsin-La Crosse. At the top, the university logo and name are displayed. Below the title, there is a 'Help' link. A welcome message states: 'Welcome to UW-L's curriculum inventory management (CIM) system. Use this tool to search edit, add, and deactivate programs and policies.' This is followed by instructions on how to search by Program Code or Title, and a note about multiple degree types. A contact email, curriculum@uwlax.edu, is provided. The main interface features a search bar, a 'Search' button, a '- OR -' separator, a 'Propose New Program' button, and a 'Quick Searches...' dropdown menu. Below this is a table with columns for Program Code, Title, Workflow, and Status. The table lists several programs, including Dual Degree Program in Physics and Physical Therapy, Physics Major with Biomedical Concentration, Data Science, Master of Science, Ed. D. in Student Affairs Administration and Leadership, English Education Minor, Political Science Education Minor, and Political Science Education Major (EAA Certification).

Program Code	Title	Workflow	Status
PHYDDPT.BS	Dual Degree Program in Physics and Physical Therapy	SAH Assistant to the Dean	Edited
PHYBMD.BS	Physics Major with Biomedical Concentration	SAH Assistant to the Dean	Edited
	Data Science, Master of Science	Faculty Senate Chair	New
	Ed. D. in Student Affairs Administration and Leadership	Faculty Senate Chair	New
ENGEDA.M	English Education Minor	ENGDEPT Chair	Edited
POLEDA.M	Political Science Education Minor		Edited
POLEDA.BS	Political Science Education Major (EAA Certification)		Edited
POL.M	Political Science and/or Public Administration Master Program		Edited

Note: Even when sorted, the CIM system will list the proposals in an order that differs from how the committee agenda will be ordered. Also, CIM only sorts one way at a time, so if you sort by title alphabetically, it won't sort by Workflow, and *visa versa*.

Logging out

Close all windows of the browser. There is no official logoff button.

For more CIM tips and training materials, see the Curriculum Guidelines on <http://www.uwlax.edu/records/faculty-staff-resources/curriculum-resources/>. Or contact the curriculum administrators in the Records and Registration office at curriculum@uwlax.edu.