

Records and Registration's CIM Guide for Department Chairs

Email Notification & Department Chair Approval Step

Each department chair has special access to approve CIM proposals in their role as department chair. Once a course or program form is submitted into the electronic workflow, only approvers may edit, approve, or rollback the proposal. The Department Chair is the first step in workflow and must review before the college curriculum committee or the college dean's office can review.

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

An email is automatically sent to the chair's UWL email for each course and program that is submitted to workflow. CIM emails will look similar to the one below and are sent by the Catalog & Curriculum Administration Team. These emails notify the chair of any curriculum changes being proposed by their department.

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

The emails will either be "**Action Required**" or "**FYI**" emails.

- **Action Required** alerts the chair that a proposal is waiting for review and needs approval to move forward. The chair should log into CIM using the link in the email in order to review and approve or rollback the proposal.
- **FYI** emails are to notify the department chair that a proposal coming through may be of interest to them and related to their program. However, no action is required and the proposal cannot be edited. The department chair will receive notifications for both CIM course and/or program proposals.

Logging into 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/>

Tip: bookmark the above link so that you don't need an "Action Required" email to get in.

Approval Page Overview

On the Approve Pages screen, chairs will see all course and program proposals ready to be reviewed underneath his or her role. 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 shows the COURSELEAF interface. At the top left is the COURSELEAF logo. Below it, a table lists 'Pages Pending Approval' with columns for 'PAGE' and 'USER'. The first row is '/courseadmin/2224: PSY 200: Orientation to the Psychology Major' by Eileen Rozek. The second row is '/courseadmin/2236: PSY 309: Volunteer Experience in Psychology' by Casey Tobin. The third row is '/courseadmin/2275: PSY 450: Fieldwork Experience in Psychology: Undergraduate Internship' by Casey Tobin. To the right of the table is a 'Page Info' sidebar with details for the selected proposal: 'Title: PSY 309: Volunteer Experience in Psychology', 'Last Update: Sep 8, 2015 2:50pm', 'Template: cim', 'Page Authors: any', 'Workflow:', 'College: CLS', and 'Department: Psychology'. Below the table is a 'PAGE REVIEW' section with a 'Hide Changes' button and a 'View Changes By' dropdown set to 'All Changes'. The main content area shows the 'UNIVERSITY of WISCONSIN LA CROSSE Course Inventory Change Request' for 'PSY 309 : Volunteer Experience in Psychology'. It includes a 'Print Proposal' button, a 'Shred Proposal' button, and submission details: 'Date Submitted: 09/08/15 2:50 pm', 'Viewing: PSY 309 : Volunteer Experience in Psychology', 'Last edit: 09/08/15 2:50 pm', and 'Changes proposed by: ctobin'. On the right, an 'In Workflow' section lists: 1. PSYDEPT Chair, 2. Records Office, 3. CLS Assistant to the Dean, and 4. CLS Assistant to the Dean. At the bottom right of the 'PAGE REVIEW' section are 'Edit', '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:** see who made what comments/revisions to the proposal. 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:** the department chair has three options:
 - a. Edit:** use this feature to make revisions. A comment is required to explain the revisions and document any changes made.

- b. **Rollback:** use this feature if the department chair wants the proposer to re-work the proposal. A comment is required with the rollback option. The proposer will receive an auto-email with the comment included, so the comment to say why the proposal is being sent back or instruct the proposer to contact the department chair for more information.
- c. **Approve:** if the proposal meets the chair's approval, the chair approves and the proposal moves on to the next step in workflow. **Approval is needed in order for the proposal to continue on in workflow. If the Approve button is not clicked, the proposal remains stopped at this step.**

***Important:** in order to make the UCC or GCC agenda in time, a proposal must be at the Registrar's step by Noon the Wednesday prior to the committee meeting.*

Accessing the course and program forms databases:

Faculty and staff can review course and program forms at any time without being an official approver. This access is useful for taking stock of what active courses and programs a department has, for helping new faculty understand the course they are to teach, and for keeping track of the changes other departments are currently making. Please note: if a form is in workflow, only approvers who haven't approved yet or administrators may make changes.

A. To access the CIM databases, first log into CIM:

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/>

B. To find the course or program you need, use one of the following search methods.

1. Search for a specific course/program:

- 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. Find all proposals at a certain step in workflow:

- 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 until you find the workflow step you are interested in. (Mac users need to hover over the right side to find the scroll bar.)

3. Pick an option from the Quick Searches dropdown menu and then sort.

Course search example:

LA CROSSE
Course Inventory Management Help

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.

- OR -

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:

LA CROSSE
Program Management Help

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

The system can search by Program Code (the code used in WINGS, e.g., MTH.BA) 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 program that starts with "MATH". *MATH will find every program title that ends with "MATH". *MATH* will find every program that has MATH included in the title. The Quick Searches function provides a list of predefined search categories to use.

Multiple degree types: If the current major offers both a B.A. and a B.S., only one program code appears in the search but that code covers both degrees. The B.A. option is typically the code used. But both types are in the system and will be updated at the same time because they share the major's curriculum.

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

- OR -

Program Code	Title	Workflow	Status
PHDDP.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

Note: 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.