CIM Term Detailed Users Guide

Use Mozilla Firefox or Google Chrome, do not use Internet Explorer or Safari.
Use desktop computer, do not use notebook/tablet.

This guide is provided to you by the Office of the University Registrar (OUR), Student Information Systems (SIS), Honors College (HC), and Campus Writing Program (CWP). For general usage questions, contact OUR. For content specific questions, contact HC or CWP. Contact information is at the end of the guide.

About CIM Term

In two areas of MU's curriculum, approval must be collected for a course to be taught in a given term: Honors courses and WI courses. While the term based approval is not a new process for WI courses, it is new for Honors courses as of August 2017. Both processes have been joined into one online system, CIM Term.

Also new to the curriculum is a W or HW designator added to the catalog number for a course. While the H designator is not new for Honors courses, the W designator on WI courses and the HW designator on courses that are both Honors and WI, are both new to the MU course catalog. For example, going forward, you may see a course in the catalog as ANTHRO 3340, ANTHRO 3340H, ANTHRO 3340W, or ANTHRO 3340HW.

CIM Term is designed using the same software as was used for CIM Courses, and thus has features that may seem familiar. Similar to how CIM Courses stores individual records for each course, CIM Term also stores individual records.

However, in CIM Term, an individual record is created for each unique combination of course and primary instructor.

For WI course proposals that were approved in CWP's last online system since 01/01/2013, a record of this proposal has already been created in CIM Term for that course/instructor combination. For example, a record was created for Dr. Cisco for his GN_HON 2111 course he previously taught as WI, and it can be found with the record name of *GN_HON 2111HW ciscojo*. That record can then be used to propose updates for future terms in which he is wanting to re-teach the course as WI.

Here are several more general examples of how records are created and stored within CIM Term:
- Professor M. Jones wants to propose he teach ANTHRO 2215 as a WI course for Fall 2017. He has never taught ANTHRO 2215 as WI in the past. He would submit a new proposal in CIM Term, and the record would be stored as *ANTHRO 2215W jonesm*.
- The next time Prof. Jones wants to teach the course, he would find the record *ANTHRO 2215W jonesm* in CIM Term, and propose an update to it.
- Professor S. Smith wants to teach this same course as writing intensive, and she had never taught it as WI either. She would submit a new proposal, and it would be stored as *ANTHRO 2215W smiths*.
- Prof. Smith also wants to teach ANTHRO 2100H. She would submit a new proposal and it would be stored as *ANTHRO 2100H smiths*.
- Prof. Smith also wants to offer her ANTHRO 2100H course as WI for a semester. She would submit a new proposal and it would be stored as *ANTHRO 2100HW smiths*.

Accessing CIM Term

There are four ways to access CIM Term.

1) Link to it from the OUR website at http://registrar.missouri.edu/faculty-staff/index.php. On this page, in the section labeled "Curriculum", you will see a link for the "New CIM Term system".
2) Link to it from the CWP website at http://cwp.missouri.edu/wi/propose.php
3) Simply type in the url for the CIM Term system: https://nextcatalog.missouri.edu/termadmin.

Technology and CIM

Not all browsers work with CIM Term in exactly the same way. So if you are having issues within CIM Term, try switching browsers. We have found that CIM Term works better with Mozilla Firefox and Google Chrome. You should also make sure that you have the latest, or relatively current, versions of the browsers installed on your computer. Benefits of using a recently upgraded browser: boxes display correctly, required fields function properly, some provide online spell check. Drawbacks of using an outdated browser: layout of page is thrown off, required fields don't act as such and so you may skip them resulting in the form having to be returned to you, few have spell check. Do **not** use Internet Explorer (IE) or Safari as your browser, as they may result in certain information not populating appropriately on the form.

Similarly, not all hardware works with CIM Term in exactly the same way. Any desktop or laptop computer should have full access to all functionality described here. However, while iPads can be used to access the site, create new course proposals, and edit existing courses, it cannot be used to submit them as it does not support the functionality of browsing and attaching a document. So for iPads, do your work, save it, and come back to it later while at your desk top computer to add attachments. Details on saving are provided later in this document.

Security to CIM Term

Any faculty or staff with a valid MU userid and password can access CIM Term. It is open for them to view, search, propose new, or propose update. The system is further secured in the workflow process, such that as soon as a new or updated proposal is submitted, only those individuals authorized can approve these proposals and move them forward in the online workflow approval process.

Logging in to CIM Term

After you have navigated to CIM Term using one of the 4 ways described above, you will immediately be directed to a UM System log in screen. This screen should confirm for you that you are logging into CourseLeaf (the name of the software behind the CIM Term system). Type in your MU assigned userid and password to complete the log in process.

If when you navigate to the url, you don't get the UM System log in screen, and instead you immediately see the CIM Term screen with a red box saying "Please Complete Log In", it could mean your log in from before was never cleared, and there is a miscommunication between CIM Term and the secure log in system. If you were to click on the log in box displaying, it would then give you a screen similar to the one below. To clear this old log in information, you will need to clear your cache on your browser. For instructions on clearing cache on either a pc or tablet, refer to the DoIT Knowledge Base at https://help.missouri.edu/portal/ss/. Search for "empty browser cache".
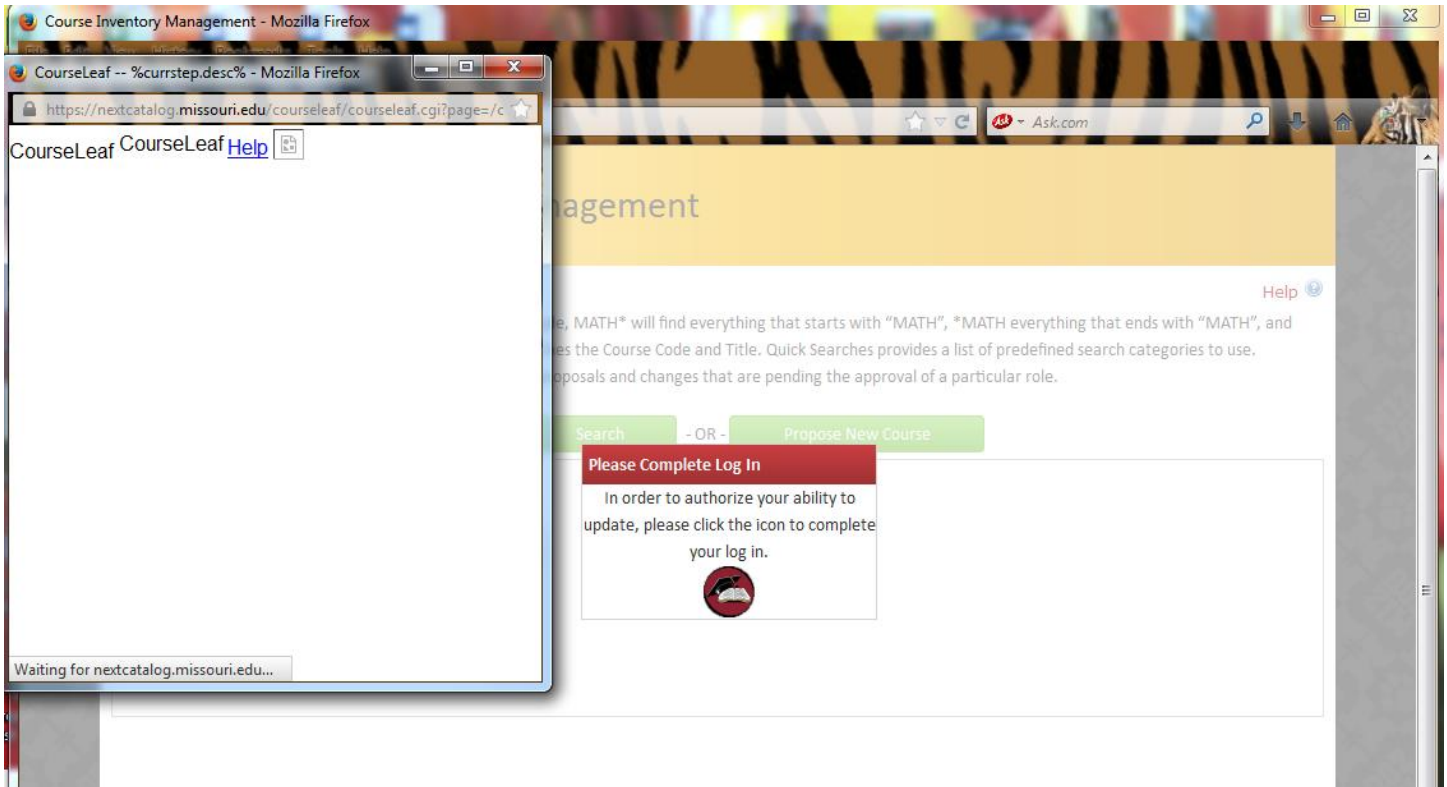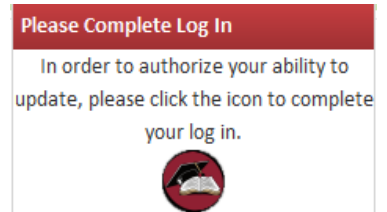
Loading

The CIM Term online system is connecting to a number of data sources, including Shibboleth for user confirmation and CIM Courses for course data. So any time you are in CIM Term, and navigating between pages or forms, or clicking on links, if the page displays the message of "Loading" or "Transferring data…" or similar phrasing in the url status noted in the lower left corner of a page, this indicates it is still processing, and you should wait for the page to finish loading before clicking on anything or proceeding with any data entry. It should not take more than 5-10 seconds for the page to finish loading, and the message will disappear. If for some reason you have waited a minute and the page still says "Loading", you should close out of the page and out of CIM Term, clear your cache (see section above for link to instructions on clearing your cache), and try it again. If the page still never finishes loading, contact the OUR at muregistrarcatalog@missouri.edu.

Main CIM Term page

Once you have logged in, you will be directed to the main CIM Term page. Following is a description of the areas of this page: Searching for a proposal, Summary of a proposal, button to Propose New, and button to Update Proposal.

Searching for a proposal

When you first arrive at the main CIM Term page, it will automatically display a list of all proposals which are currently in some stage of the proposal process. This is referred to as the inventory.

There are two ways to search for a proposal or set of proposals in CIM Term.

1) Use the Quick Searches drop down on the right side of the page, just to the right of the green Propose New button. If you click on the dropdown arrow, you will get a list of options. Options are based on proposal status, type of course, or a specific step in the workflow approval process.

2) Use the free text box on the left side of the page, just to the left of the green Search button. Type in text that you want CIM Term to use in the search, and click the green Search button. It will search the course/instructor record name and title. Use asterisks as wild cards. The search is not case sensitive. For examples and guidance, see the instructions on the main CIM Term page in the section titled USING CIM TERM behind the Show/Hide Instructions button. Note that you must either type in the full name of a record (ex. *HIST 2001HW tigert*) or use the asterisks to take the place of the rest of the record (ex. HIST 2001*).

Results of your search will display in a list below. If nothing matches your criteria, the message "No Results Found" will display. If multiple courses match your search criteria, all will be listed in the box below. If only

one course matches your search criteria, it will display and will automatically be highlighted for you to take further steps if you choose.

To reset your search back to the original list, use the reload button ⟳ on your browser, usually located in the top bar to the right of the url display.

Summary of a Proposal

Once a proposal is pulled through a search, select the proposal in the list, if it isn't selected already, by clicking on it one time. After a few seconds, the summary will display below. Following is a description of the sections in this summary.

Status area: if a proposal is in process, this area confirms the proposal status

Viewing: lists the curriculum designator, catalog number, userid of instructor, and title of the proposal being viewed

Date Submitted: if a proposal is in process, this area lists the date and time the proposal was initially submitted into workflow.

Last edit: If a proposal is in process, this area lists the date and time of when this proposal was last edited.

Preview Workflow: For any existing proposal that has not been edited, or for an existing proposal or new proposal that has been edited/entered and saved in CIM Term but has not yet been submitted through workflow, the summary page will display a link for "Preview Workflow". Clicking on the link will pop up a box displaying the steps that would be included in the workflow based on the current state of the data in the form. The information listed includes the role name, the email address of the first person listed for the role, and the name(s) associated with the role. Note that this is a tentative workflow. Changes made to the data within the proposal could result in changes to the final workflow.

In Workflow: For proposals (existing and new) that have been submitted through workflow, "Preview Workflow" no longer displays. Instead what displays is "In Workflow" with a list of the approval steps through which this proposal is being sent. Steps showing in green have already been completed. The step showing in yellow is where the proposal is currently awaiting approval. Steps in gray are what will follow. By hovering your cursor over an approval step, the email address for the person associated with that step is displayed in the bottom left corner of the window. Below the list of approval steps is "Approval Path" that provides details of date, time and userid for the approvals already collected.

The rest of the summary covers the proposal form itself: Proposal Type; Contact Information; Term for Proposal; Course Catalog Information; Instructor Information; Honors Course Information (if applicable); Writing Intensive Course Information, Writing Intensive Assignments, and Writing Intensive Teaching (if applicable); Course Syllabus; Additional Comments. If the proposal has been updated, deleted information will show in red with a strikethrough, and added information will show in green.

Propose New   Propose New

If you need to make a new proposal (i.e. the course has never been taught WI by this instructor, or it has been but it was before 2013 so no data was converted over from the old proposal system), click on the green Propose New button next to the Search area on the main CIM Term page. This will open a blank proposal

form in a new window. Your userid is already showing as the proposer. Complete the form as instructed. Red boxes indicate a required field. Blue help bubbles provide additional information on a specific question. Save and submit options are at the bottom of the form (see below for instructions on these options).

This form must be submitted for every course for each term you are wanting to teach. For example, if for Fall 2018 you are wanting to teach CH_ENG 1000H, and also wanting to teach CH_ENG 4220 as WI, you must submit two CIM Term forms. For either proposal, click on the green Propose New button. A course picker box will display. Click in the box that says "Select Course Code" or on the drop down arrow next to it for a list of courses to scroll through, or start typing the curriculum designator in the box that now displays. As you type, the search results narrow. For the honors course, find CH_ENG 1000H in the list, and click the gray Propose New button. For the writing intensive course, find CH_ENG 4220 in the list, and click the button, and once you fill out the proposal form and save/submit it, the CH_ENG 4220W course record will be saved and available to search on going forward.

If you are co-teaching a course, it only need be submitted once for approval, and within the form, information will be collected on all of the instructors who will be involved in its teaching for that term. But note that the record is created and stored based on the userid of the main contact instructor. If you are submitting a CIM Term proposal for a course that is cross-listed, only one proposal needs to be submitted. For example, if Professor T. Thompson is proposing to teach PEA_ST 2000 as WI for Spring 2018, upon approval, both the PEA_ST 2000W course and the SOC_WK 2000W course will be listed in the schedule of classes for that term for that instructor.

Note that in order to submit a proposal to teach an Honors course, or to teach an Honors course as WI, the Honors course must already exist in the course catalog (i.e. have a record in CIM Courses).

Propose Update   Propose Update

Once a CIM Term record is created (either Propose New was used to start a new proposal but it was not submitted into workflow yet, or a past proposal was fully approved and now you want to update it for a future term), you will use the Proposal Update button.

Locate the record associated with the course and instructor in the CIM Term inventory (see "Searching for a proposal" above for detailed instructions on using the CIM Term search). Once you have located the record through one of the search options, click on that record so it is highlighted in the results list and the summary for that record displays on the bottom portion of the page. Then, click on the green Propose Update button at the top right of the summary, just below the search results display box. This will open the updating form in a new window.

If you are finishing up a new proposal that was started earlier and saved without being submitted, simply complete the remainder of the form. When you are finished with all data entry, click Save and Submit.

If you are using the prior proposal to update for a new term, you will find that the majority of the form is pre-populated with the information from the last proposal. Fill in the questions that are blank, and update any information that has changed since the last time this instructor proposed this course. Red boxes indicate a required field. Blue help bubbles provide additional information on a specific question. Save and submit options are at the bottom of the form (see below for instructions on these options).

The Actual CIM Term Proposal Forms

While the Propose New and Propose Update forms themselves are fairly self-explanatory, below are some helpful hints to guide you in their use.

Required Fields in red boxes: Any field which is required displays with a red box around it. These fields must be completed prior to submitting the form into workflow. Most browsers will prevent you from submitting the form with empty required fields. However, note that some older versions of browsers do not recognize this functionality and will allow you to submit an incomplete form. Users should be aware that this will result in the form being sent back to you for completion.

Prefilled from prior proposal: The fields on the Propose Update form are prefilled as much as possible with information from the last proposal. You only need to update the fields where changes are being made, and complete any required fields that may be blank, such as the Term, Changes since last offering, enrollment estimates, and Syllabus attachment.

Prefilled from myZou or CIM Courses: Certain field on both a new proposal and an updated proposal are prefilled using official course data from myZou and CIM Courses, and directory information from myZou/myHR. No updates are permitted to these fields.

Disabled: Certain fields are grayed out and cannot be updated, as they contain information that was used to create the record's key on the original proposal. Such fields regard submitting on behalf of an instructor, the contact instructor, and the WI check box for Honors courses. If you are wanting to propose an update to your Honors course, and there is a change in whether or not it is WI, then this requires you to use Propose New since it would result in a different record (i.e. an honors course that isn't writing intensive would have a record of *ANTHRO 1000H jonest*, for example, but when the honors course IS writing intensive it would have a record of *ANTHRO 1000HW jonest*.

Copying and Pasting: You can copy text from another document, such as Word or Notepad or even another CIM Term proposal, and paste it into a field on the CIM Term proposal form. Be aware that special characters and formatting in your source document may not copy/paste well.

Helpful Hint for WI proposals pre-loaded into CIM Term from CWP's last online system: In CWP's last system, all of the assignment information was collected in one question. So when it was pre-loaded into CIM Term, it all came in as one assignment. However, the new CIM Term form asks for information separately on each assignment. Here is our recommended steps for transitioning your assignment information:
(1) Scroll to WI Assignment section, click yellow edit pencil to open detailed information for this assignment.
(2) Highlight text in field labeled Purpose, copy (Control C or right click and select Copy).
(3) Paste text into Word document.
(4) Back in CIM Term form, add new assignment using green plus sign. (Note: you will later delete original assignment in list, but it is recommended you wait until you are finished with rest of assignments.)
(5) This new assignment will be record for your first course assignment. Add title. For purpose, copy portion of text in word document that applies to this assignment, and paste here.
(6) Add remaining details on this assignment, save.
(7) Repeat these steps for remainder of your assignments.
(8) When you are finished adding all assignments, delete old initial assignment row.

Blue Help bubbles: Next to individual questions, you may notice a blue circle with a question mark inside of it. These are referred to as help bubbles. You can either hover over the bubble, or click on it, and additional information regarding the question and answer options will be displayed in a pop up window. If you clicked on it, simply click the X to close the pop up window.

Hyperlinks: In various places within the form, or within the blue help bubbles, hyperlinks have been added for quick access to additional information. You should be aware that when you click on one of these links, a new web page will open as the top window on your screen. Your CIM Term proposal form has NOT been closed. It is just now behind the newly opened windows.

Logic built into form: Remember that there is logic built into the form. This logic is to help prevent errors, and to make the form more efficient. For these reasons, it is highly recommended that you complete the form in order, from top to bottom.

First, answers to certain questions drive the appearance or hiding of questions below. For example, if on a WI course you indicate the Delivery Mode is Online, you will see a follow-up question appear asking if it is Self-paced. Or if on a WI course you indicate the enrollment is expected to be > 29, you will be asked additional questions on large enrollment classes.

Second, values for some answers are restricted, and an error message will result if you choose an invalid answer. For example, if after entering all assignments for a WI course the total pages of revisions is > 8, upon submitting the form you will get an error message that says "Writing Intensive courses must include at least eight pages of revisions." Or if you enter information on a WI assignment and indicate the first draft number of pages is 0, you will get an error message that says "Please enter a value larger than 0."

Answer options do not match my needs: In multiple choice questions or drop downs, if you do not see the answer you are needing to use, contact the OUR at muregistrarcatalog@missouri.edu. For example, in the Effective Term question, future terms are only listed up to a certain point in time, and will be updated on a periodic basis. But if you are trying to submit a form for a future term that is not yet listed, contact the OUR and that term can be added to the drop down.

Other form issues: For any other issues or questions regarding the form, contact the OUR at muregistrarcatalog@missouri.edu.

Action Options – Cancel, Save Changes, Save & Submit

Once you are inside the form, you have three options with your work. Those are described below.

Cancel: Clicking on this button will close the form and NOT save any changes made in this session. So, for example, if you used Propose New, and had not yet saved the form, selecting Cancel will delete the form and leave no evidence of your work. If you had previously started a proposal form and saved it, and are now returning to it, selecting the Cancel will only discard the work you have done in this session, and save the form as it was the last time you saved it.

Save Changes: Clicking on this button will save all changes that have been made, and then close the form, returning you to the main CIM Term page. This does NOT submit the proposed changes through workflow. You, or another user, can come back at any time and pick up where you left off. You will be allowed to save

without having yet filled out all of the required fields. Once saved, to re-access the form to complete and submit it, find the record in the inventory, click on it once, and click the Propose Update button.

Save & Submit: Clicking on this button will save all changes that have been made, check that all required fields are completed, check that all errors have been cleared, and submit the form into approval workflow. You will no longer be able to edit the form once it has been submitted, unless you represent a step within the approval workflow. Once submitted, the first person in the approval workflow will receive an email to notify them that they can now review the proposal.

Shredding a Proposal

If you should happen to start a proposal, either Propose New or Propose Updated, and realize before you Save & Submit that you do not need this proposal for whatever reason, you should send an email to muregistrarcatalog@missouri.edu and ask that the proposal be shredded. Only courseleaf administrators in the Registrar's Office can shred a proposal. If the proposal was for a new course, shredding that proposal will delete all evidence that it ever existed. If the proposal was for an edit on an existing course, all evidence of the change will be deleted and the course reverts back to its unedited state.

Workflow (general description)

Workflow is the online automated approval process built into the CourseLeaf software. With workflow, no more printing and hard signature collections are necessary. When a proposal is saved and submitted into workflow, CIM Term automatically assigns the workflow steps necessary to gather the required approvals. These steps are then displayed on the Proposal summary page, as described above. Each step is represented by a role. Each role belongs to a person or group of people.

Once the form is submitted into workflow, and CIM Term has assigned the workflow steps, the person(s) in the first step of the workflow receives an email notice that the proposal needs their review. This person has the option to edit the proposal, approve the proposal, or rollback the proposal. The workflow is a linear process, in that it must proceed one step at a time, from step 1 to step 2 to step 3, etc. The person in step 2 will not have access to approve the proposal until step 1 has approved. And the person in step 3 will not have access to approve the proposal until step 1 and step 2 have approved. See section below on Approval Queue for additional details on action options.

Keep in mind that the workflow that has been set up for CIM Term is different than the workflow that was established for CIM Courses and for the online catalog pages.

MU's Workflow

For all proposals, the workflow includes several administrative type steps for the Office of the University Registrar (OUR).

> **OUR initial review** – this is an early step in every workflow. In this step, the staff in the OUR who deal with course information will conduct a review of the form and the workflow. This review will help to insure that, first, the workflow is being assigned as we expected it to be, especially in the early use of the new system. There are also occasions where the OUR has to manually insert a step or two into the workflow. OUR will also review the form, just to insure that all required content is included, and that technically the form is correct. Just to clarify, the OUR is not evaluating the content of the form in

terms of its academic validity, as that is for the Honors College and Campus Writing Program to review. If all is technically in place, the OUR will approve the proposal, moving the form forward in the workflow.

OUR final review – this is near the end of every workflow. In this step, the OUR will once again review the form, as it could have changed since the beginning of the workflow. If all is technically in place, the OUR will then data enter the information into myZou, and approve the proposal, moving the form to any final remaining steps.

For most proposals, the workflow includes several FYI type steps, where the recipient is simply sent, for informational purposes, a notification that the proposal has been submitted. These email notices will not include a link to the approval queue, since no approval is required. Instead a link is provided to CIM Term where the user can review the proposals in the works.

Chair/Director FYI - this is early in the approval process, so that the individual listed on the proposal as the Chair/Director will be notified that a proposal has been submitted. No approval is requested, just a simple notification.

All Instructors FYI – this is towards the end of the workflow, after the Honors College or Campus Writing Program has approved the proposal, and OUR has entered the information into myZou. In this step, all instructors listed in the Instructor Information table will be sent an FYI notice, just to make sure they are aware their names were included on a proposal, and that it has been approved.

CWP Training FYI – this is at the very end of the workflow for a WI proposal where one or more instructors either have not attended the CWP training or haven't attended recently. The FYI notice goes to the CWP office notifying them to send training information to the appropriate instructors.

For all proposals, the workflow includes one or two initial review steps.

Honors initial review - this step is towards the beginning of the workflow, and gives the Honors College staff a chance to review the proposal to identify if any key pieces of information are needed, and to gather that information prior to the proposal being reviewed at the Director's level.

CWP initial review, and CWP coordinator review - these steps are toward the beginning of the workflow, and give the Campus Writing Program staff a chance to review the proposal to identify if any key pieces of information are needed, and to gather that information prior to the proposal being reviewed at the Board Subcommittee or Board level.

For all proposals, the workflow includes the appropriate approving bodies (i.e. Honors College for H and HW proposals, Campus Writing Program for W and HW proposals).

CWP Subcommittees for CWP-ESS, CWP-HA, CWP-NAS - this collects approval for all W and HW proposals from the appropriate subcommittee of the Campus Writing Board: Education and Social Sciences, Humanities and Arts, or Natural and Applied Sciences. Which committee is added to the workflow is determined based on the course's subject area.

CWP Board - this collects approval for all W and HW proposals from the Campus Writing Board, and ensures that the Campus Writing Program has everything they need in the proposal to move forward with its processing.

Honors Director - this collects approval for all H and HW proposals from the Director of the Honors College, and ensures that the Honors College staff has everything they need in the proposal to move forward with its processing.

Below is a sample email that is sent to an approver when a proposal is ready for them to review.

From: MU's online catalog/curriculum system [mailto:missouri@notify.courseleaf.com]
Sent: Thursday, August 25, 2016 11:12 AM
To: Cisco, Jonathan <ciscojo@missouri.edu>
Subject: [CIM Term] proposal approval needed for BL_STU 4488W hartmanlo: Major African Diaspora Women Writers, 1789 to 1890

Jonathan:

Your review is required on a pending proposal for BL_STU 4488W hartmanlo: Major African Diaspora Women Writers, 1789 to 1890 to be taught as either Honors (H), Writing Intensive (W), or both (HW) for an upcoming term.

Please visit https://nextcatalog.missouri.edu/courseleaf/approve/?role=CWP%20initial%20review to take necessary action. Remember that once you get to the queue, wait until it no longer says "Loading".

If you are approving as the Contact Instructor, and your name does not appear in the Role Name box in the top bar, use the drop down to select it.

If you are approving in any other capacity, "CWP initial review" should appear in the Role Name box, else use the drop down to select it.

Once your Name/Role is selected, you will be shown a list of proposals awaiting your approval. You should take one of the following actions on the above mentioned proposal:
- Edit it further and then approve it to send it forward in the workflow.
- Roll it back to a previous editor with comments on suggested revisions, keeping in mind that the workflow starts again from that step forward.
- Approve it as is to send it forward in the workflow.

For questions or information regarding this email or the CIM Term approval process, please reply to this email.

Thank you.
Office of the University Registrar - Scheduling/Catalog

The email is addressed as "*From: MU's online catalog/curriculum system*", and "*To: <THE NAME OF THE PERSON ASSOCIATED WITH THE ROLE>*", in this case "To: Cisco, Jonathan". The salutation addresses this person, indicates a pending proposal needs to be reviewed, and names the course (in this example BL_STU 4488H hartmanlo). Then a link is provided to access the approval queue. The approval queue is discussed in more detail below in this document.

Individuals in the approval process should be aware that some email notices may end up in their junk mail folder instead of their inbox. If this happens, to prevent future emails from being routed to junk mail, the user needs to list the CourseLeaf email address in the Safe Senders in Outlook.

Approval Queue

Using the link provided in the email notice, approvers will be directed to a special page inside of CIM called an Approval Queue, and will be asked to log in using their MU assigned userid and password. Once logged in, the approval queue will display, looking something like this.

Initially, you will see under the blue title bar for PAGE a message that says "Loading…" You must wait until that message is gone before proceeding. This will usually take 5-20 seconds.
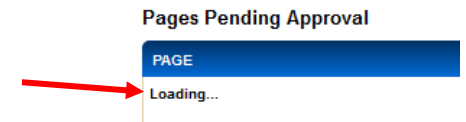
When the message is gone, in the "Your Role" box, either your name (if you are approving as the Contact Instructor), or the name of your CIM Term user role (if you are approving as any other role) should appear. If it does not, use the drop down to find the correct name (yours or your role's) and select it.

Be aware that some users have multiple roles to which they are associated, so those users will have to use more care to select the role corresponding to the workflow step where the course is awaiting approval. Once you have the appropriate selection, in the box under the blue title bar for PAGE, you will see a list of the proposals which are awaiting your approval. In the example below, the OUR initial review role has both CIM Term proposals (showing as /termadmin/) and CIM Course proposals (showing as /courseadmin/) awaiting their approval.

Select the proposal you want to review by clicking on it in the list. Once highlighted, then the proposal's summary will display in the box under the blue title bar for PAGE REVIEW. This summary is identical to the one displayed on the main CIM Term page, with the same sections, information, and red/green mark up.

From here, the approver has three options: Approve, Edit, or Rollback.

Approve: allows the person to "sign off" and send the proposal on to the next step in the workflow. Once Approve is selected, that person no longer has access to the proposal; only the next person in the workflow has access.

Edit: allows the person to make additional changes before approving. Subsequent approvers will see this revised proposal. Note that you still have to click Approve once you are done editing.

Rollback: allows the person to roll the proposal back to any previous step in the workflow, or even back to the original proposer. Clicking Rollback opens a pop-up window. In that window, select the person to whom you are rolling the course back. A comment must be entered so that when the proposal is rolled back, the person to whom it is rolled sees the comment in their email notice. These comments are also stored as part of the Comments section on that actual proposal form for future reference. Once the proposal is rolled back, it is removed from the Approver's list and that person no longer has access to the proposal; only the person to whom it was rolled now has access.

Caution: While the Rollback can go back to any step in the workflow, once it reaches that person, the workflow approval process then starts again from that step and goes forward one step at a time.

Caution: If a proposal is rolled back to the original proposer, that person is considered to be "pre-workflow", and so the proposal is now back to simply an "edited but not submitted" status and is actually not in workflow any longer. At that time, any user can edit the proposal and re-submit it to workflow. Any approvals or comments from the initial pass of workflow are no longer visible. The only evidence of this proposal being on a second or subsequent pass through workflow is the list of rollback comments in the Comment section of the proposal form itself.

For Help inside of CIM

For another description of how the CIM CourseLeaf software works, from the main CIM page, click on the blue bubble next to Help in the upper right corner of the page. Help ⑦ This will open a new window displaying CourseLeaf provided documentation. Keep in mind, however, that MU's CIM Term is a custom built system just for MU, and while it is similar to the standard CourseLeaf products, there are some differences that will not be explained within CourseLeaf's documentation.

When inside of a proposal, edit or deactivate form, some questions have a blue help bubble next to them. You can either hover over the bubble or click on it to display additional details for that question and/or set of answers.

You can always contact the OUR staff who work with the software by emailing them at muregistrarcatalog@missouri.edu.

For content specific questions, if it is an Honors course, contact the Honors College at mizzouhonors@missouri.edu, and if it is a Writing Intensive course, contact the Campus Writing Program at muascwp@missouri.edu.

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