HOW TO REVIEW AND APPROVE PROPOSALS – QUICK GUIDE

When an initiator in CIM 'confirms and submits' a proposal for a course or program, workflow is initiated. The workflow is routed through the steps as approved by Senate. Also built into the workflow are notification steps where individuals or groups will be notified of changes, but no approval action is required.
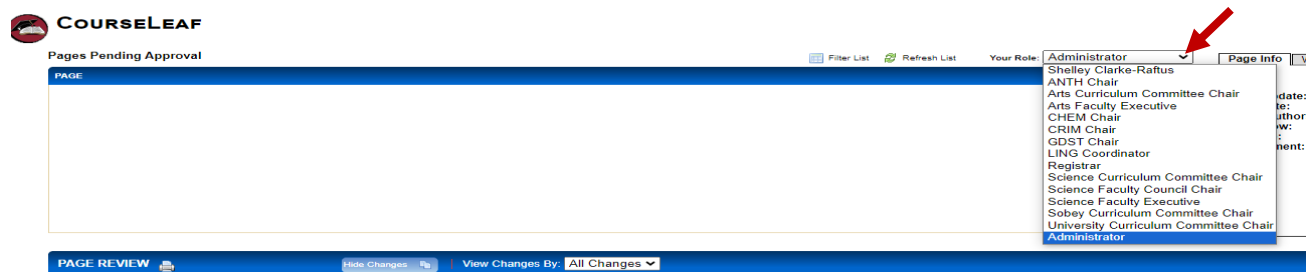
RECEIVING WORKFLOW NOTIFICATION AND LOGGING INTO CIM

There are two types of notifications automatically generated by the system:

1) **Approver** – requires action within workflow

2) **FYI** – does not require action in workflow but this type of notification provides information that may require action outside of workflow. This includes committees, non-academic units and units who are included in the course ecosystem.

When an initiator submits a proposal, workflow is initiated. Immediately, the chair of the academic unit receives notification in an **email** automatically generated through the system. The library will receive an FYI email when new courses are submitted.

You will receive an email for each item that requires your approval. You can also access the approval page directly, https://smu-ca-next.courseleaf.com/courseleaf/approve/. You will be prompted to log in using your s# (use lower case 's') and password.

REVIEWING A PROPOSAL

- On the *Pages Pending Approval* screen, select the role appropriate to your approval authority. **Note**: although you may select different roles in the drop-down menu, you will only be able **Edit, Rollback,** or **Approve** a course or program associated with your role. Click on the item to be reviewed in the **Page** panel.

- o Useful features on this page:
  - ▪ **Workflow Status:** You can view where the proposal is in the workflow and track the progress of proposals by viewing the workflow and status of each proposal by clicking on the workflow status table at the top right corner of the screen.

  - ▪ **Hide Changes:** Allows you to view proposal without changes.

  - ▪ **View Changes By:** The default is view all changes but changes can also be view by the approver who made the edits. This will display tracked changes made by the selected approver.

- An approver in workflow has three options for proceeding:
  - o Edit the proposal – make additional changes and add comments.
  - o Approve the proposal.
  - o Rollback the proposal with comments to the initiator or a previous approver.

EDITING A PROPOSAL

The approver can make edits to the proposal to facilitate forward progress in workflow, rather than rolling back the proposal to the submitter or a previous approver for editing. **Note** that the submitter/previous approvers are not notified of the changes. Designate approvers are encouraged to consult with their academic unit chair regarding editing protocols.

- Select the *Edit* button on the menu bar that displays above the proposal. The proposal template will open in a new window.
- Enter your edits or changes and click the *Save Changes* button at the bottom of the template.

ROLLING BACK A PROPOSAL

If there are questions or significant changes to be made to the proposal, the approver may roll back the proposal to the submitter or a previous approver. As a part of this action, comments must be entered and can be viewed by the member(s) receiving the rollback. Rolling back a proposal gives a previous approver/submitter an opportunity to make changes and resend the proposal to the workflow process. Note that designate approvers are encouraged to consult with their academic unit chair or director regarding rollbacks.

- Select the **Rollback** button on the menu bar that displays above the proposal.

- Select a role/member (initiator or previous approver) to return the proposal back to. Enter Comments in the *Comments/Reason* Window.

Rollback Page

Rollback to:

Comment/Reason:

can't change the name

Rollback   Cancel

- The members in that role are automatically notified by email, which includes the comments/reason for the rollback and action required.

APPROVING A PROPOSAL

Approvers can approve the proposal and send it to the next step in workflow.

- Click the *Approve* button in the menu bar that displays above the proposal.

Edit   Rollback ⊖   Approve ⊕

- An "Approved" message will display and the proposal will no longer display on the list of pages pending approval. An email notification will be sent to the next role in workflow.