

University of Mary Washington

CourseLeaf CIM Approver's Guide

University of Mary Washington
Office of the Provost

www.provost.umw.edu/umw-curriculum-approval-process

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Administrators and faculty will often serve as approvers in CIM. Department Chairs, Associate Deans, Deans, Committee Chairs, the Registrar's Office, and the Provost will commonly be asked to approve curriculum proposals as they make their way through workflow. This document will assist with the process.

Prior to using this document, be sure to review the [CourseLeaf CIM User's Guide](#) to familiarize yourself with the basics of the curriculum inventory management system.

Acting on Proposals in the CIM Workflow

1. Workflow refers to the chain of approvals that will lead a proposal from the submission by the initiating user (a faculty member) through the sequence of steps required to secure final approval. Depending upon the type of proposal submitted, the steps in workflow will differ. See the various [curriculum action guidelines](#) documents for a listing of workflow steps.
2. When a proposal is submitted, the first approver in workflow receives a system generated email stating that there is a proposal requiring action. Text of the email will go like this:

There are pending course change proposals awaiting your APPROVAL, including #title#.

Please visit:

#approveurl#
to review the changes and provide your feedback.

You are receiving this email from UMW's Course Approval system called CourseLeaf CIM.

For questions or information regarding this email, please reply to Kevin Caffrey
<kcaffrey@umw.edu>.

#title# will be filled in with the proposal title; #approveurl# will be a direct link to that proposal in the CIM system.

**Note: Additional members of a committee will receive similar emails to REVIEW the proposal in question when it reaches that step of the workflow (i.e. – a New Course Proposal has made its way to the College of Education Curriculum Committee. The Chair of this committee will receive a system generated email for approval of the proposal like the one above; the other members of the committee will simultaneously receive a system generated email for review of the proposal. Best practice when it comes to committees obviously is for the Chair to not approve the proposal in CIM until the committee has met to discuss.*

3. Clicking on the url link takes you to the CourseLeaf Console – you'll be prompted to log in first, using your UMW username and password. Another way to get to the same place is:

<https://nextcatalog.umw.edu/courseleaf/approve/>

Under **Pages** will be a listing of where all current proposals requiring action is currently in workflow. Select the proposal you are acting on (if there are multiple proposals needing your attention all will show up in the list). If you had clicked on the url in the email, you would be viewing that proposal. If other proposals were awaiting action, they would all be listed here as pages pending approval.

The **Pages** box will list all the different roles a person has in CIM workflow. The same person, for example, may be a department chair and a curriculum committee chair. Select the role you are acting within given the proposal's state in workflow. **Pages** should also list other roles where an active proposal is currently in workflow. You can select any of these roles to review the proposals, but unless you are the approver, you will not be allowed to approve them.

On the top of the page, there are three icons under **Next Steps**: Edit, Rollback, and Approve:

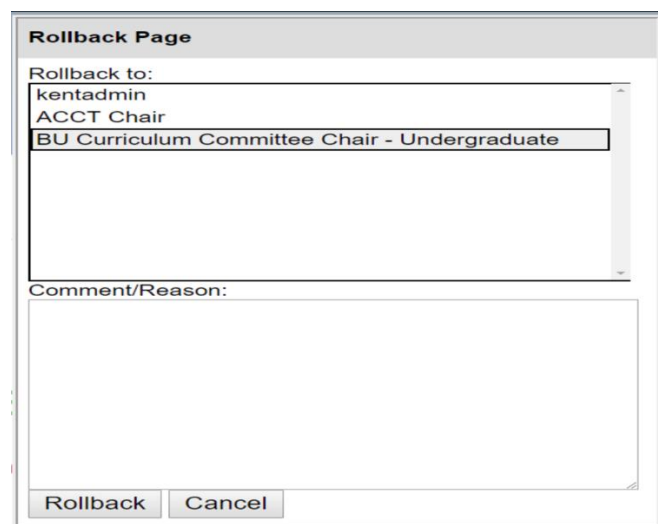
Edit allows the page approver to make changes on the proposal. Anything added shows as **green text**. Anything deleted shows as **red-strikethrough**. The edit action will bring up the submitted proposal, allowing the reviewer to make needed changes to it. Once edits have been incorporated, at the bottom of the edit screen, there will be two action buttons:

Edits once made will be visible to all who look at the proposal. Another key point to note is that the editing will not move the proposal in workflow; it just makes a change. The approver still needs to act.

Rollback returns the proposal to an earlier step in the workflow.

When rollback is selected, a comment box appears. The top part of the box lists all the persons who have previously acted on the proposal; select the individual to whom the proposal will be returned. A comment/reason for the rollback must be included. Any comments entered stay with the proposal, are visible to anyone viewing the proposal in CIM, and may not be changed.

Because the rollback action erases any prior approvals, it is advisable to use this action sparingly. If an approver largely supports the proposal but has a few concerns about details, rather than rolling back a proposal, the approver might contact the previous persons who had acted on the proposal, discuss the concerns, and the either edit (and approve) or, if satisfied with the explanations, approve the proposal with no edits. If things remain at an impasse after discussion outside of the CIM system, then rollback would be the appropriate action. If the approver does not agree with the proposal, it would be rolled back with reasons given.



The screenshot shows a dialog box titled "Rollback Page". It contains a "Rollback to:" label followed by a list box with three items: "kentadmin", "ACCT Chair", and "BU Curriculum Committee Chair - Undergraduate". The third item is selected. Below the list box is a "Comment/Reason:" label followed by a large text area. At the bottom of the dialog are two buttons: "Rollback" and "Cancel".

Approve sends the proposal to the next step in workflow. Approving after editing sends the proposal forward with changes incorporated.

When a proposal is in workflow, the steps in the process are displayed. Items in **green** show approval, items in **orange** show the point where the proposal is currently in workflow, and items in **gray** have yet to occur.

See below for an example:

1. 10 Associate Dean
2. 10 Curriculum Committee Chair
3. 10 Governance Chair
4. University Curriculum Committee Chair
5. University Faculty Council Chair
6. Registrar's Office
7. Banner