

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 ACCESSING PROPOSALS

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 will only be prompted to log in once using your s# (use lower case ‘s’) and password.

ACCESSING A PROPOSAL FROM EMAIL LINK

- Click the link provided in the email notification you received. You will be redirected to the **Approval** site.

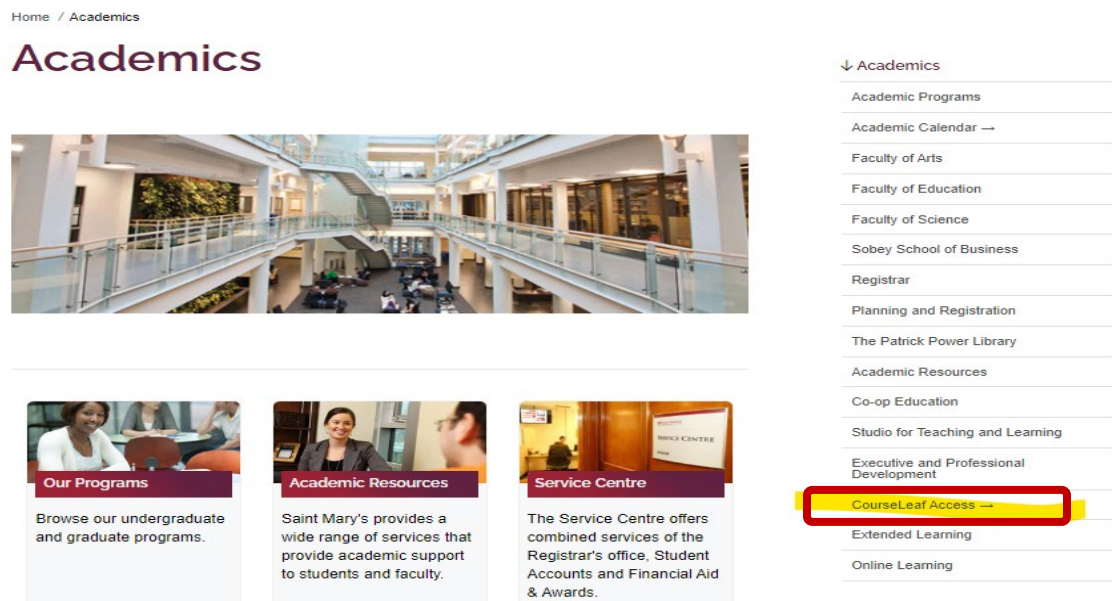
The screenshot displays the COURSELEAF system interface. At the top, a green header bar contains the COURSELEAF logo and a user profile with a 'Log Out' link. Below the header, the main content area is divided into several sections. On the left, a 'Pages' sidebar shows a dropdown menu for 'FINA Chair' and a table with columns 'PAGE' and 'USER'. The table lists a page for '/courseadmin/5973: MGSC 3361: Supply Chain Management' assigned to 'Christine Panasian'. Below this is a 'Workflow' section with a 'COMPLETED' list showing 'Christine Panasian' and a 'PENDING' list with various roles like 'FINA Chair, Sobey Curriculum Committee fyiail, Sobey Curriculum Committee Chair, Sobey Faculty Executive fyiail, Sobey Faculty Executive Chair, Sobey Faculty Council fyiail, Sobey Faculty'. A 'Workflow' button with an 'UPDATE' label is also present. The main content area features a 'Page Review' section with a 'VIEW CHANGES BY:' dropdown set to 'All Changes', a 'HIDE CHANGES' button, and 'NEXT STEPS' including 'APPROVE'. Below this is a red banner with the Saint Mary's University logo. The central part of the screen displays a 'Course Change Request' for 'MGSC 3361 : Supply Chain Management'. It includes buttons for 'Export to PDF' and 'Export to Word', and provides submission details: 'Date Submitted: 03/03/25 2:01 pm', 'Viewing: MGSC 3361 : Supply Chain Management', 'Last approved: 02/22/23 5:20 am', 'Last edit: 03/03/25 2:01 pm', and 'Changes proposed by: Christine Panasian (s2249868)'. A list of 'Catalog Pages referencing this course' is shown, including 'Management Science (MGSC)' and 'Certificate in Retail Management'. On the right, an 'In Workflow' sidebar lists the approval steps: 1. FINA Chair, 2. Sobey Curriculum Committee Chair, 3. Sobey Faculty Executive Chair, 4. Sobey Faculty Council Chair, 5. University Curriculum Committee Chair, 6. Senate Approval, and 7. Banner.

- If you wish to review the proposals on the dashboard, click **CourseLeaf**.

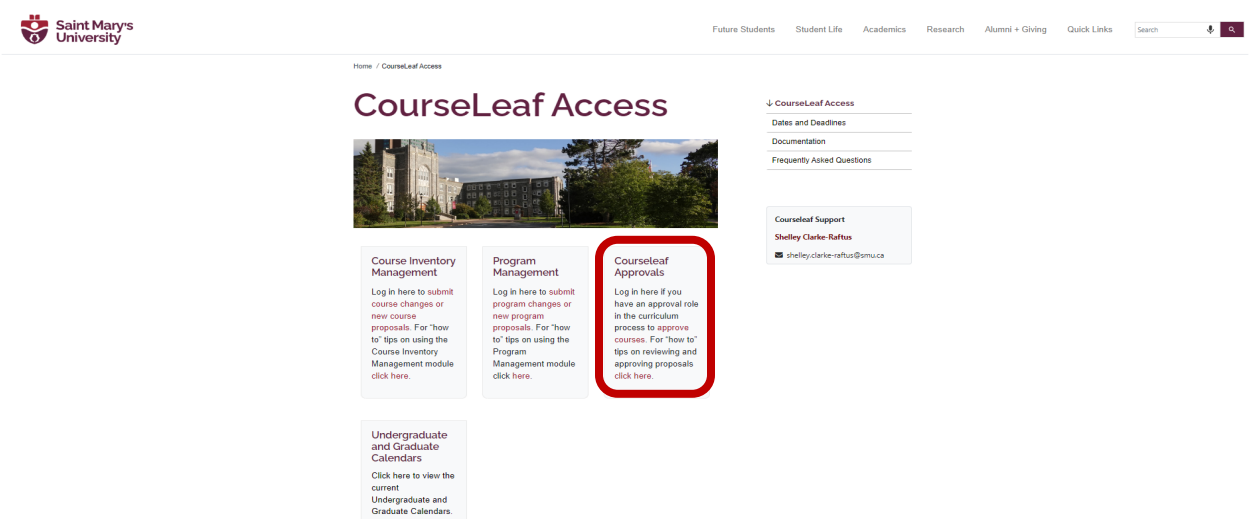


ACCESSING A PROPSAL ON THE COURSELEAF ACCESS LANDING PAGE

- Go to the SMU website, <https://www.smu.ca/>, under **Academics**, click **view all**.



- Click on **CourseLeaf Access** to access the landing page.

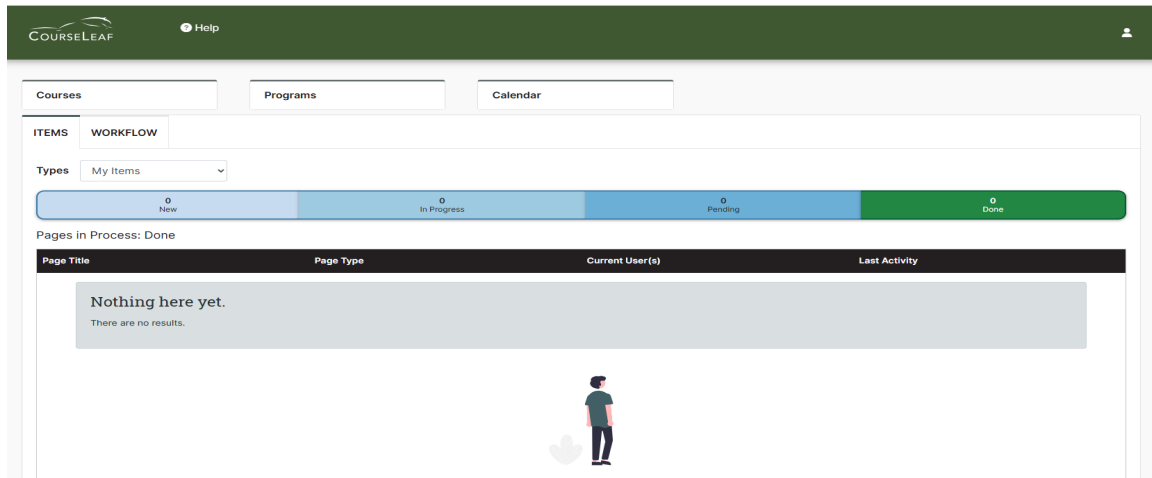


- Access the **CourseLeaf 10 Dashboard** under **CourseLeaf Approvals**.

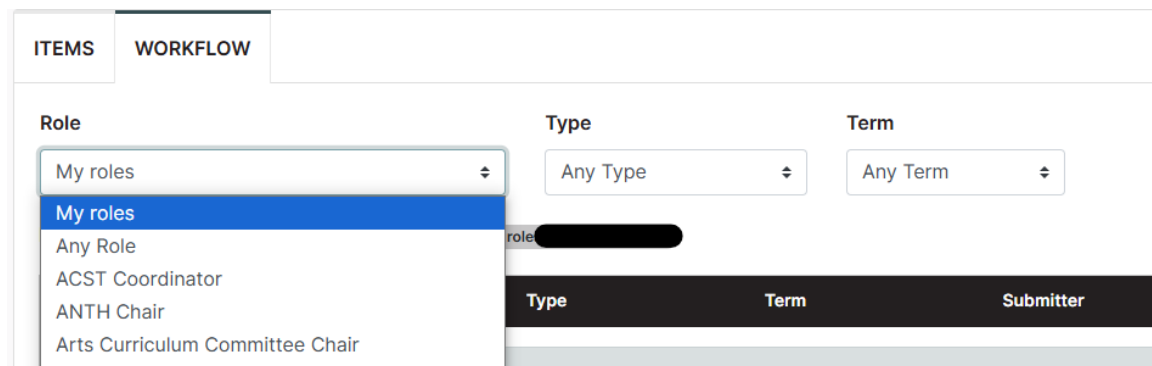
- Once you click on the proposal it will pop up to review.

NOT APPROVER (REVIEW ONLY)

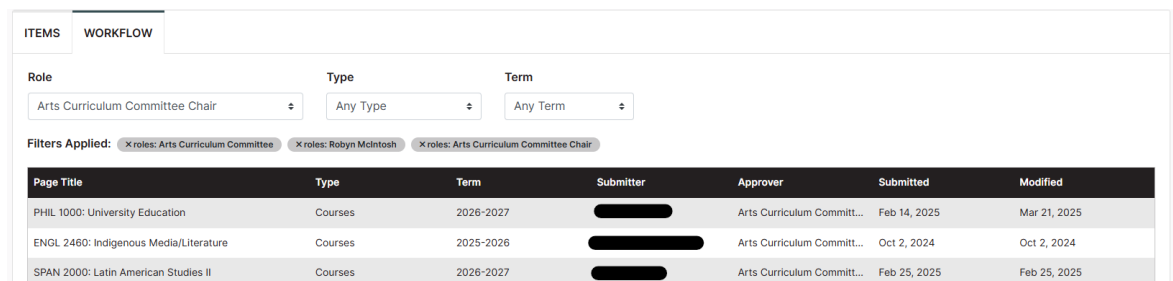
- If you are not an approver, you will need to select the proposals to review from the **Workflow** tab.



- Click on **Workflow** tab. Under **Role**, select from the drop down the list of the active approval roles. Click the role you want to review.



- Select the proposal from the list.



- Once you click on the proposal it will pop up to review. Reviewers won't be able to approve proposals, but they do have the option of adding comments. If you have been added to the Committee Role in the workflow you will see **Add Comment** on the proposal. Click to add your comment. The comments will be saved directly on the proposal.

VIEWING A COURSE PROPOSAL (EXAMPLE)

Export to PDF

Export to Word

1 Date Submitted: 11/16/21 9:17 am

2 Viewing: **ACCT 2241 : Introductory Financial Acct**

3 Last edit: 11/16/21 9:17 am
Changes proposed by: Shelley Clarke-Raftus (s6740574)

Catalog Pages referencing this course

[Accounting\(ACCT\)](#)
[Bachelor of Commerce - Honours Economics](#)
[Commerce Special Topics \(BCOM\)](#)
[Finance \(FINA\)](#)
[Minors](#)

Subject Code	ACCT - Accounting	Proposed Course Number
2241		
Department	Accounting	
Faculty	Sobey School of Business	
Academic Level	Undergraduate	
Credit Hours	3	
Long Title	Introductory Financial Accounting	
Abbreviated Title	Introductory Financial Acct	
Effective Term	September - December 2022	
Crosslisted with		

4 Description

Students study basic accounting concepts and principles, their application to business transactions and financial statements, and the uses and limitations of the balance sheet, income statement, and **statement statements** of cash flow.

Prerequisites

~~MGMT-1221 and either CISV-1225 or CSCI-1226 or appropriate work experience determined in advance by the Chairperson of the Department.~~

Notes

Academic Year

Expected enrolment

Field Course: Length of field study (if applicable) and location(s) field work is done

5 Why are you proposing new or editing an existing course?

The only change is to eliminate the prerequisite courses to allow students to take the class in their first year. Also, to correct a spelling mistake.

6 Reviewer Comments

7 In Workflow

1. ACCT Chair
2. Sobey Curriculum Committee Chair
3. Sobey Faculty Executive Chair
4. Sobey Faculty Council Chair
5. University Curriculum Committee Chair
6. Senate Chair
7. Registrar
8. Banner

8 Approval Path

1. 11/16/21 9:29 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for ACCT Chair
2. 11/16/21 9:29 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for Sobey Curriculum Committee Chair
3. 11/16/21 9:30 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for Sobey Faculty Executive Chair
4. 11/16/21 9:30 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for Sobey Faculty Council Chair
5. 11/19/21 10:03 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for University Curriculum Committee Chair

LEGEND:

- 1 - The date the proposal was submitted in CIM.
- 2 - The last time the proposal was edited and the initiator of the proposal.
- 3 - Course Ecosystem allows you to see courses and programs that would be affected.
- 4 - Tracked changes with red/green markup.
- 5 - Reason for the edit or new proposal.
- 6 - Reviewer Comments. Reasons for why proposal is rolled back would also be seen in this field.
- 7 - Workflow status. Shows where the proposal is in the workflow process.
- 8 - Approval path. Shows the path the course proposal has gone through and will include if rolled back and to who.

VIEWING A PROGRAM PROPOSAL (EXAMPLE)

Export to PDF

Export to Word

Share Proposal

1

2

Date Submitted: 11/17/21 10:21 am

Viewing: **CHEM : Chemistry**

Last approved: 11/05/21 10:01 am

Last edit: 11/17/21 10:20 am

Changes proposed by: Shelley Clarke-Raftus (s6740574)

In Workflow

1. University Curriculum Committee Chair
2. Senate Chair
3. Registrar

History

1. Nov 5, 2021 by clraig.jewell@utoronto.ca

Catalog Pages Using this Program

Chemistry

Program Title

Chemistry

Program Code

CHEM

Academic Level

Undergraduate

Program Type

Bachelor

Interdisciplinary program?

Describe the interdisciplinary nature of this program

Discipline

Chemistry

Department

Chemistry

Faculty

Faculty of Science

Effective Catalog Edition

2022-2023

3

Overview

The program offerings of the Department of Chemistry are designed to meet two main objectives:

1. to provide a rigorous core education in the theory and practice of chemistry for students pursuing a Bachelor of Science degree with Honours, Major, Minor, or Concentration in Chemistry;
2. to provide students in other disciplines an introduction to the principles and practices of this central science, contributing to their fundamental understanding and appreciation of the physical world.

Our Bachelor of Science with Major in Chemistry and Bachelor of Science with Honours in Chemistry degrees are nationally accredited programs by the Canadian Society for Chemistry (CSC) governing board, ensuring that the program has the potential to prepare graduates to practice their profession in a competent scientific manner. Honours graduates from the program are well prepared to continue their education at the graduate level in related fields of study. Major

4

Program Requirements

Major in Chemistry

The requirements for the degree of Bachelor of Science with Major apply as listed in this Academic Calendar under the heading of *Faculty of Science, Bachelor of Science – Major*. The specific list of forty-five (45) credit hours of CHEM courses required to satisfy 6 (d) is contained in the following list of Science courses required for the program:

CHEM 1210	General Chemistry I	3
Select three credits of the following:		3
CHEM 1211	Gen Chem II for Physical Sci	
CHEM 1212	Gen Chem II for Life Sciences	
CHEM 1213	Gen Chem II for Engineering	

5

Why are you proposing new or editing an existing program?

These changes reflect the addition of the new CHEM 3412 course.

6

Reviewer Comments

LEGEND:

1 - The date the proposal was submitted in CIM.

2 - The last time the proposal was approved and edited, along with the initiator of the proposal.

3 – Program Overview as seen in the calendar. Any edits will be seen with red/green mark up.

4 – Program Requirements as seen in the calendar. Any edits will be seen with red/green mark up or a blue vertical line next to the text if a table was edited.

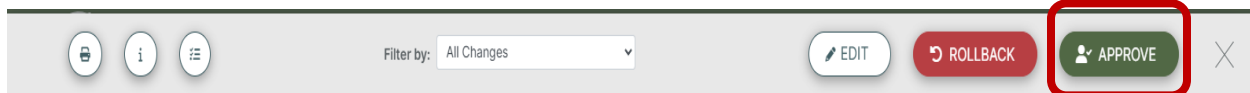
5 – Reason for the edit or new proposal.

6 – Reviewer Comments. Reasons for why proposal is rolled back would also be seen in this field.

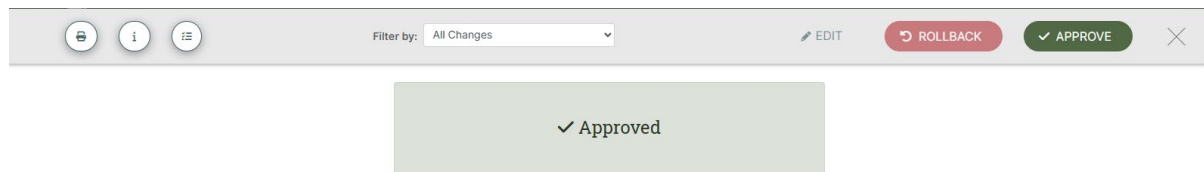
7 - Workflow status. Shows where the proposal is in the workflow process.

APPROVING A PROPOSAL

The **Approval** screen shows a gray header across the top that includes action items after review.



- Click the **Approve** button, this allows the item being reviewed to move to the next step in workflow and be removed from the logged-in user's Workflow queue.

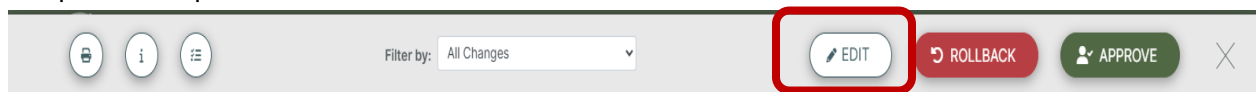


- If a user is not authorized to review an item and clicks **Approve**, it will generate a pop-up box saying that that person cannot act in that role.

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.

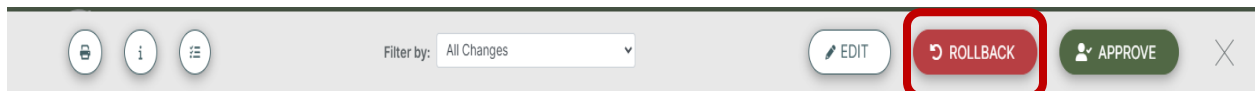


- Enter your edits or changes and click the **Save Changes** button at the bottom of the template.

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.



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