

## HOW TO for Voting Committees in the CIM (Course Inventory Management) system

For courses that require the approval of a committee, voting can be done online through CIM functionality. For groups that have opted to use the online voting, refer to the information below for step by step instructions.

### Overview

As proposals for a new course or a change to an existing course are created and submitted, CIM uses the data in the proposal, such as the career and curriculum designator, to determine the approvals that are required for the proposal. Each required approval is ordered into a linear workflow. These workflow steps are displayed for that course within CIM.

Individuals are associated with each step of the workflow. As the workflow gets to a step, that individual or group of individuals is notified via email that their approval is required on a course proposal. Each approval is collected one at a time before the workflow moves on to the next step.

If the workflow step is a voting committee, CIM allows for the all members of the committee to review the proposal, add comments to a dialog, and then submit an individual vote. Only members of the voting group can see the comments and the how the individual members have voted. The tallied votes for the group are then compared to an established threshold to then determine if the course is approved. If approved, this step of the workflow is closed and the individual or group associated with the next step is notified that their approval is needed on a course proposal. Only the tallied vote is available for viewing by subsequent approvers, and not the individual votes nor the voter's comments.

As steps in the workflow are completed, the date and time stamp of the approval, along with the user associated with that step, are recorded.

### Voting Approval Process

#### Step 1 – Notification

##### Received

Members of the voting committee will receive an email notification similar to the one shown below. Since you may also serve as the individual behind another step in the approval process, possibly as a Department Chair, DUS or DGS, it may be important for you to notice places in the email that will help you distinguish that this notice pertains to your role on a voting committee. Voting indicators are shown with a red circle.

#### **HANG ON TO THIS EMAIL!**

You will need it up until the time the course is approved or sent back with additional questions.

```
----- Original Message -----
Subject:[CIM Course] Vote Request: AFNR 1101: Special Topics in Agriculture
Date:Thu, 13 Mar 2014 16:59:15 -0500
From:Catalog Editor <missouri@notify.courseleaf.com>
Reply-To:muregistrarcatalog@missouri.edu
To:hartmanlo

hartmanlo:

There is a pending course change proposal awaiting your vote:
AFNR 1101: Special Topics in Agriculture

Please visit:
http://missouri.dev6.leafpro.com/courseadmin/?code=AFNR+1101
to review the changes and provide your vote.


For questions or information regarding this email, please reply
to this email (muregistrarcatalog@missouri.edu) or contact
the OUR Catalog staff.

[Message originally for hartmanlo@missouri.edu ]

Thank you.

-- CourseLeaf
```

## Step 2 – Log in to CIM


To access CIM and the course proposal, click on the link in the email, indicated in the example above by a gold arrow. You will be asked to log in using your MU assigned username and password. You may also have to click on the  red icon to complete your log in.

Again, hang on to this email. The url contained in the email is your access to the voting process, and is unique to each proposal.

----- Original Message -----  
**Subject:**[CIM Courses] Vote Request: AFNR 1101: Special Topics in Agriculture  
**Date:**Thu, 13 Mar 2014 16:59:15 -0500  
**From:**Catalog Editor <[missouri@notify.courseleaf.com](mailto:missouri@notify.courseleaf.com)>  
**Reply-To:**[muregistrarcatalog@missouri.edu](mailto:muregistrarcatalog@missouri.edu)  
**To:**hartmanlo

hartmanlo:

There is a pending course change proposal awaiting your vote:  
AFNR 1101: Special Topics in Agriculture

Please visit:  
<http://missouri.dev6.leefrog.com/courseadmin/?code=AFNR+1101> to review the changes and provide your vote. 

For questions or information regarding this email, please reply to this email ([muregistrarcatalog@missouri.edu](mailto:muregistrarcatalog@missouri.edu)) or contact the OUR Catalog staff.

[Message originally for [hartmanlo@missouri.edu](mailto:hartmanlo@missouri.edu) ]

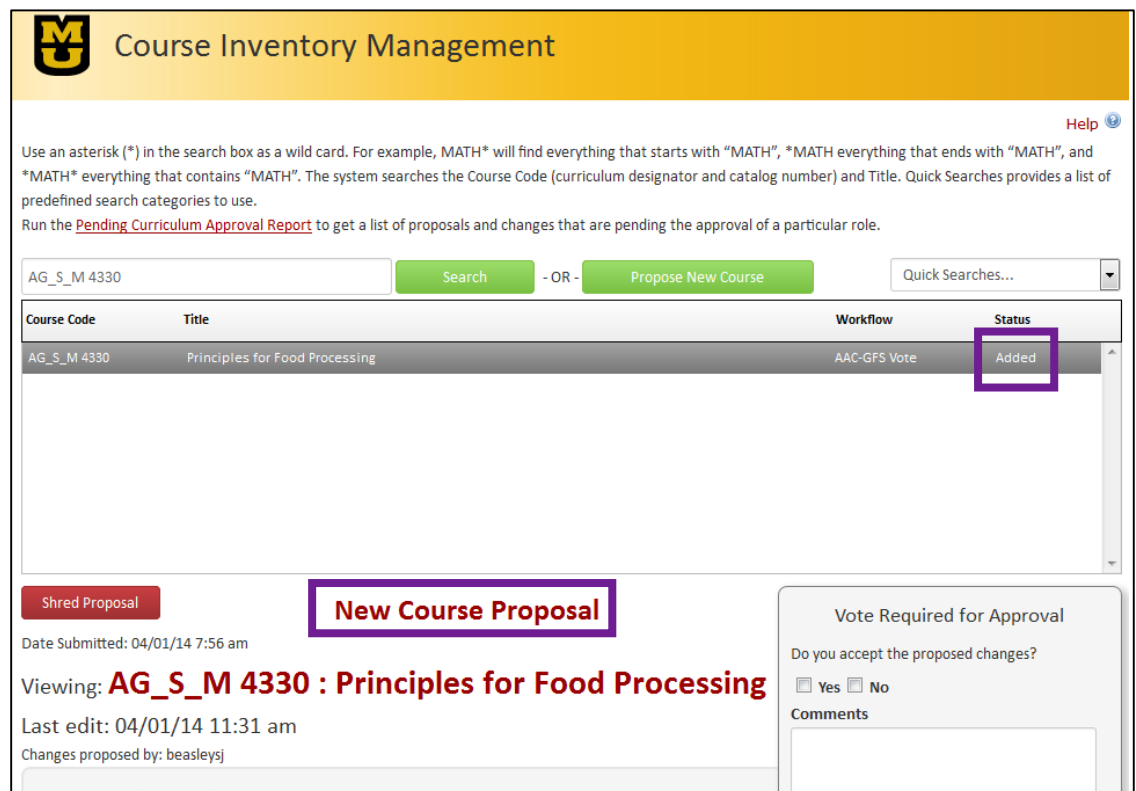
Thank you.

-- CourseLeaf

## Step 3 – View CIM

Once the log in is completed, you will be directed to a page within CIM that displays the course in a search results box, with the details on that course showing below. An example of that screen is shown below.

If there is more than one course awaiting approval from the committee, the search results box could display multiple courses. Simply click on a course in the search results box to have the details displayed below.



Course Code	Title	Workflow	Status
AG_S_M 4330	Principles for Food Processing	AAC-GFS Vote	Added

To distinguish whether the proposal is for a new course or a change to an existing course, indicators can be found in both the email and CIM. In the email example above, the text within the purple rectangles indicates a change to an existing course. In the CIM example page on the right, the purple rectangles indicate a new course. If the example had been for a change to an existing course, the status would have said “Edited” instead of “Added” and where it says “New Course Proposal” would have been blank.

#### Step 4 – Review the proposal

The details for the proposal display in the bottom portion of the CIM screen. Use the right hand scroll bar to see all of the details. In a proposal to change an existing course, content additions are in bold green type while content deletions are in red strikethrough type.

#### Step 5 – Enter comments and/or vote

All members of a voting committee will have an additional box on their course display titled “Voting Required for Approval” like the one shown here.

Vote Required for Approval

Do you accept the proposed changes?

Yes  No

Comments

Save

[View Voting Results](#)

Date Submitted: 03/12/14 2:54 pm

Viewing: **AG\_EC 4251** ~~3251~~: Agricultural Prices

Last edit: 03/12/14 2:54 pm

Changes proposed by: parcellj

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#### Contact Information

Proposer	User ID: <b>parcellj</b>	Name: Joseph L Parcell
Email: <a href="mailto:Parcellj@missouri.edu">Parcellj@missouri.edu</a>	Telephone: 882-0870	Department: Agricultural/Applied Economics
Are you submitting this proposal for a faculty member?	<b>No</b>	

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#### Course Information

Course Status:	Active	
Term to be Effective:	<b>10/1/2014</b>	
Career:	Undergraduate	
Subject Area:	Agricultural Economics (AG_EC)	
Course Number	<b>4251</b> <del>3251</del>	
Credit Hours	Fixed	# of Credits: 3

In the Voting box, your options to vote are either Yes or No. There is no option to abstain, other than to just not enter a vote. There is also a box for you to enter free text comments. Members are allowed to enter a vote or enter comments or enter both. Once you enter a vote or comments, click Save.

To view comments and votes by your fellow committee members, click on the red link at the bottom of the box that says **View Voting Results**. This will expand the box to display all the details, similar to the one on the right. It is recommended that committee members log in periodically to review the comments of the other members. Use the link in the original email for access.

As mentioned in the overview, CIM keeps a tally of the votes, and compares them to two established thresholds. One threshold is for the total number of votes cast, and the other is for the number of yes votes.

Up until the point in time when the tally meets the minimum threshold required, additional comments can be made and committee members can add, change or remove their vote. However, once the tally reaches the minimum on both thresholds, the course is considered approved, voting is closed, and an email notice is sent to the next step in the workflow. Keep in mind that these minimums may not require a vote from every member.

As mentioned earlier, only the members of the voting committee can see the comments, and the individual votes. Future steps in the workflow will instead see the vote tally, indicating the total number of votes yes/cast and the percentage yes/cast. An example vote tally is shown here.

5. 05/19/14 11:43 am

3/6 votes cast.

Yes: 100% No: 0%

Approved for AAC-GFS

Vote

Vote Required for Approval

Do you accept the proposed changes?

Yes  No

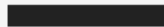
Comments


Test for adding the first comment.

Save

[Hide Voting Results](#)

Votes Cast: 2

Yes 50% 

No 50% 

#### Full Voting Results

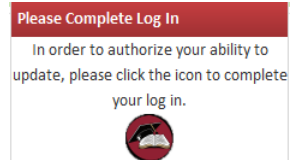
User	Vote
limbacht	No
Test for adding third comment, and No vote.	
whitneycm	Yes
Test for adding second comment, along with Yes vote.	
hartmanlo	
Test for adding the first comment.	

## Option to edit, rollback, or approve

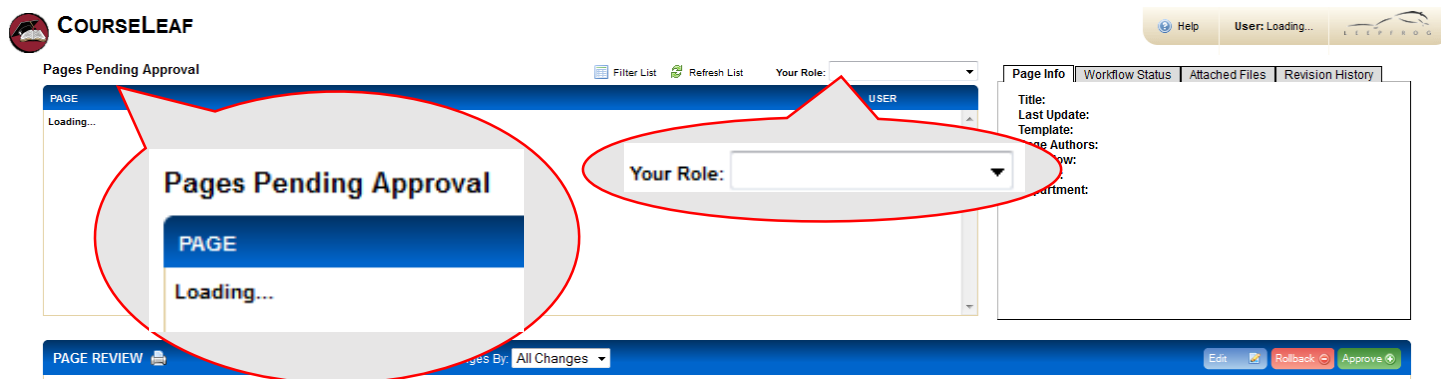
On occasion, a committee may wish to edit a proposal prior to approving it. Or the votes may tally such that the proposal cannot be approved as is, and may need to be rolled back to a prior workflow level for adjustments. In other words, the proposal is denied. To handle any one of these situations, it is recommended that the chair of the committee, or their designated member of the committee, access the course via the CIM Approval Queue and handle any necessary actions.

**Access the Approval Queue** – open a browser and navigate to <https://nextcatalog.missouri.edu/courseleaf/approve/>.

You will be asked to log in to CourseLeaf. Type in your MU assigned userid and password. You may subsequently see a red box saying “Please Complete Log In”. Click on the red circle and your log in should be complete.



**Approval Queue page Loading** – initially, when the Approval Queue page displays, 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.



**Select Role** - When the message is gone, in the “Your Role” box, use the drop down to select the name of your committee, for instance CAFNR CC Vote. Once you have selected the appropriate role, in the box under the blue title bar for PAGE, you will see a list of the courses which are awaiting your committee’s approval.

**Select Course** - Select the course on which you need to take action by clicking on it in the list. Once highlighted, then the course’s summary will display in the box under the blue title bar for PAGE REVIEW. This course summary is identical to the one displayed on the main CIM page, with the same sections, same information, same red/green mark up.

**Take Action** - You can edit or rollback the course using the buttons in the blue PAGE REVIEW title bar.

**Edit:** Allows you to make changes before approving. Subsequent approvers will see this revised proposal.

**Rollback:** Allows you to roll the proposal back to any step in the workflow or back to the initiator. Clicking Rollback opens a pop-up window. In that window, select the workflow step to whom you are rolling the course back. Notes should be entered explaining why the course is being rolled back. The person to whom it is rolled sees those comments in their email notice. Keep in mind that while you can roll back to any step, once it reaches that step, the workflow approval process then starts again from there and must go forward one step at a time again. Once the course is rolled back, it is removed from the committee’s approval list.

**Approve:** While there is also an Approve button on the blue PAGE REVIEW title bar, caution should be used as this will bypass the committee voting process and send the proposal on as Approved to the next step in the workflow. On occasion, if the chair wishes to make an exception and move the proposal forward based on the votes that have been collected to date, the Approve button can be used to take this action.