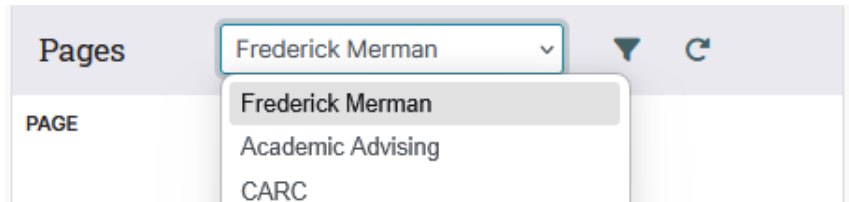


CIM Workflow Approval / Rollback / Denial Guide

This guide will walk you through how to use the Courseleaf CIM workflow pages for reviewing active proposals assigned to you or your role.

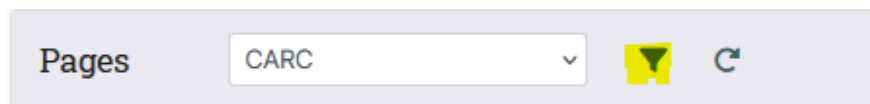
1. Navigate to the **Approve Pages** at <https://nextcatalog.towson.edu/courseleaf/approve/>
2. Click the “**Your Role**” drop-down menu at the top of the page and select the account for which you want to review and approve pages



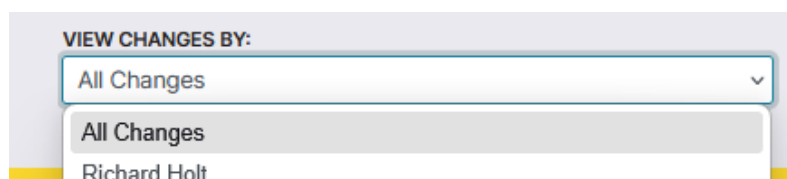
- If you use the link from the automated email, your role will be pre-selected for you
 - **Note:** Click the **Refresh List button** to see if new pages have been added since your last visit or if the list doesn't contain an expected page
 - **Note:** If your role is not showing in the dropdown this is because there are no pages assigned to that role. Only roles that have pages pending approval show in the dropdown
3. Scroll through the Pages Pending Approval list and select the page to edit

/courseadmin/268: ART 233: PHOTO IMAGING - DIGITAL WORKFLOW FOR NON-ART MAJORS	Jenee Mateer
/courseadmin/433: ART 409: CERAMICS IV: VESSEL	Richard Holt

- When a page is selected, the reports and workflow status window and the Page Review window will be populated with information
- To filter your pages, click the **Filter button**, then enter text to filter on. You may filter on any text in the URL or title shown in the Pages Pending Approval window. To reset the filter to show all, click Filter, then click **OK** with the filter field blank

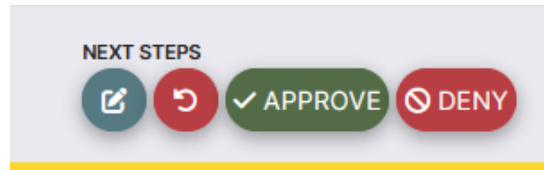


4. Review content in the Page Review window:
 - **View changes made:** Click the **View Changes** by drop-down menu and select an editor whose changes you wish to review



- The selected editor's changes are shown in red and green: red for deleted content, green for added content

- Remember that any number of page editors can be in a workflow. Each editor reviews or edits content sent from the editor directly before them in the queue. The changes seen here are changes the selected author made compared to the document they received
 - **Hide Changes:** View the document without color-coding or markup
5. Choose an action on the page. One of four actions may be taken after reviewing the page. To edit, rollback, approve the page, or deny the proposal, click the appropriate button in the upper right of the Page Review window. The page may also be left alone and returned to later.



- **Edit the page:** Click **Edit** to make changes to the page. This will produce a toolbar at the top of the Page Review window for Catalog pages. Visit the Page Body or Set-Up/Title instructions for how to make the desired edits. CIM and CLSS pages will open the CIM Form or direct the user to the Scheduling Unit respectively. An accepted general practice is that after editing the page, approve the page to send it to the next step in the workflow
- **Rollback the page:** Click **Roll Back** to send the page back to a previous editor or approver. A prompt will appear to make comments about why the page is being rolled back. Make comments in the space provided and click Rollback in the new window. The page will then be removed from the Pages Pending Approval section
- **Approve:** Click **Approve** to send the page on to the next step in the workflow and remove the page from the Pages Pending Approval Section
- **Deny:** For an edited course or program, denying the proposal will removal all changes and send the course/program back to rest. For a new course/program proposal, it will shred the proposal and remove any history of the submission. **As such rollback is generally preferred and deny should only be used if the proposal has no path forward.**

Deny Page

WARNING: Denying this proposal permanently ends its workflow and reverts the record to the last approved version. The denied proposal details are saved in the record's history. The record remains searchable in CIM and available for reporting. This action cannot be undone.

- **Leave the page for another time:** The page may be left for another time. Select another page to review, click **Logout**, or close the browser window.