CIM: Approval Workflow

When a proposal is submitted, it kicks off an approval workflow.

If you are an Approver, you will receive an email with a link to the Approval Workflow system.

Note: Additional emails may be sent from the system for notification purposes only.

Accessing the Approval Workflow System

There are two (2) ways you can access the Approval Workflow system:

(1) Email
From the approval email you receive:
1. Click on the link
2. You will arrive at the Approval Workflow system. Notice that Your Role will already be populated

(2) Direct Link
In your internet browser:
1. Navigate to: next-bulletin.miami.edu/courseleaf/approve
2. Once you sign in, click on the Your Role dropdown menu to select your Role in the Workflow

Approval Process

1. All proposals pending approval will be listed on the left and will identify the:
   - **Page**: The proposal Plan Code and Description
   - **User**: The person who submitted the proposal
2. If the list is too long, click on Filter List and enter a filter value to narrow down the list
3. To view a document, click on an item in the list

Quick Tips

- Click Help at any point for a detailed system help manual

4. The proposal will display with a Red/Green markup:
   - **Green** representing edits
   - **Red** and crossed out representing something that was removed

5. The stage in the Workflow will appear on the right

6. At this point you have several options:
   - **Edit** – Open the proposal for editing. Once in edit mode, please refer to the Propose New Cognate tip sheet for guidance
   - **Hide Changes / Show Changes** – Toggle red/green markup to give a clean preview
   - **View Changes By**: **All Changes** – See what the proposal looked like when another user had it
   - **Add Comment** – Add a comment and click Save. Your comment will appear at the bottom of the proposal, under Reviewer Comments

7. When you are ready to move the proposal along, you can do one of the following:
   - **Rollback** – Transfers access back to a previous person in the Workflow. You may roll back several steps as well.
     **Note**: Rolling back several steps results in repeated approvals, delaying the overall approval process. Consider email or conversation instead. Rolling back does not undo edits.
   - **Approve** – Sends the proposal to the next step in the Workflow
Related Tip Sheets

- Overview & Navigation
- Propose New Cognate