

# 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 interface for reviewing a 'New Course Proposal'. The main content area shows the following details:

- Course Change Request**
- New Course Proposal**
- Export to PDF and Export to Word buttons
- Date Submitted: 10/08/25 10:33 pm
- Viewing: **FREN 3461 : Narratives of Anthropocene**
- Last edit: 02/23/26 2:19 pm
- Changes proposed by: [Redacted]

On the left, a 'Workflow' section shows a 'COMPLETED' step for 'Library Review FYI' and a 'PENDING' list of roles including MODL Chair, Arts Curriculum Committee Chair, Arts Faculty Executive, Arts Faculty Council Chair, University Curriculum Committee Chair, and University Curriculum Committee Chair.

On the right, an 'In Workflow' sidebar lists the following steps:

1. MODL Chair
2. Arts Curriculum Committee Chair
3. Arts Faculty Executive
4. Arts Faculty Council Chair
5. University Curriculum Committee Chair
6. Senate Approval
7. Banner

At the top right, there are buttons for 'APPROVE' and 'HIDE CHANGES'.

Field	Value	Field	Value
Subject Code	FREN - French	Proposed Course Number	3461
Department	Languages and Cultures		
Faculty	Faculty of Arts		
Academic Level	Undergraduate		
Credit Hours	3		

- 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**.

Home / Academics


# Academics






**Our Programs**

Browse our undergraduate and graduate programs.



**Academic Resources**

Saint Mary's provides a wide range of services that provide academic support to students and faculty.



**Service Centre**

The Service Centre offers combined services of the Registrar's office, Student Accounts and Financial Aid & Awards.

↓ Academics

- Academic Programs
- Academic Calendar →
- Faculty of Arts
- Faculty of Education
- Faculty of Science
- Sobey School of Business
- Registrar
- Planning and Registration
- The Patrick Power Library
- Academic Resources
- Co-op Education
- Studio for Teaching and Learning
- Executive and Professional Development
- CourseLeaf Access →
- Extended Learning
- Online Learning

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


Saint Mary's University

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Home / CourseLeaf Access

## CourseLeaf Access



**Course Inventory Management**

Log in here to submit course changes or new course proposals. For "how to" tips on using the Course Inventory Management module click here.

**Program Management**

Log in here to submit program changes or new program proposals. For "how to" tips on using the Program Management module click here.

**Courseleaf Approvals**

Log in here if you have an approval role in the curriculum process to approve courses. For "how to" tips on reviewing and approving proposals click here.

**Undergraduate and Graduate Calendars**

Click here to view the current Undergraduate and Graduate Calendars.

CourseLeaf Support

Shelley Clarke-Raftus

✉ shelly.clarke-raftus@smu.ca

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

# REVIEWING A PROPOSAL ON THE DASHBOARD

## APPROVER

- Once logged in to the dashboard you will automatically see the proposals under the **Workflow** tab. Click on **Workflow** tab.

ITEMS **WORKFLOW 27**

Role: My roles | Type: Any Type | Term: Any Term

Filters Applied: X roles: AADV Chair | X roles: Arts | X roles: Arts Curriculum Committee Chair | X roles: Arts Faculty Council Chair | X roles: Arts Faculty Executive | X roles: Arts Review | X roles: Myles McCallum

Page Title	Type	Term	Submitter	Approver	Submitted	Modified
FREN 3500: Indigenous Lit. in French	Courses	2025-2026	[Redacted]	Arts Faculty Executive	Oct 2, 2024	May 12, 2025
PHIL 1000: University Education	Courses	2026-2027	[Redacted]	Arts Curriculum Committ...	Feb 14, 2025	Mar 21, 2025
ENGL 2460: Indigenous Media/Literature	Courses	2025-2026	[Redacted]	Arts Curriculum Committ...	Oct 2, 2024	Oct 2, 2024

- Select the proposal from the list.

ITEMS **WORKFLOW 27**

Role: My roles | Type: Any Type | Term: Any Term

Filters Applied: X roles: AADV Chair | X roles: Arts | X roles: Arts Curriculum Committee Chair | X roles: Arts Faculty Council Chair | X roles: Arts Faculty Executive | X roles: Arts Review | X roles: Myles McCallum

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ENGL 2460: Indigenous Media/Literature	Courses	2025-2026	[Redacted]	Arts Curriculum Committ...	Oct 2, 2024	Oct 2, 2024

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

Filter by: All Changes | EDIT | ROLLBACK | APPROVE

SAINT MARY'S UNIVERSITY

### Course Change Request

Export to PDF | Export to Word | Add Comment

**New Course Proposal**

Date Submitted: 02/14/25 3:50 pm

Viewing: **PHIL 1000 : University Education**

Last edit: 03/21/25 2:37 pm

Changes proposed by: [Redacted]

Subject Code	PHIL - Philosophy	Proposed Course Number	1000
Department	Philosophy		
Faculty	Faculty of Arts		
Academic Level	Undergraduate		
Credit Hours	3		
Long Title	Introduction to University Education		
Abbreviated Title	University Education		
Effective Calendar	2026-2027		

**In Workflow**

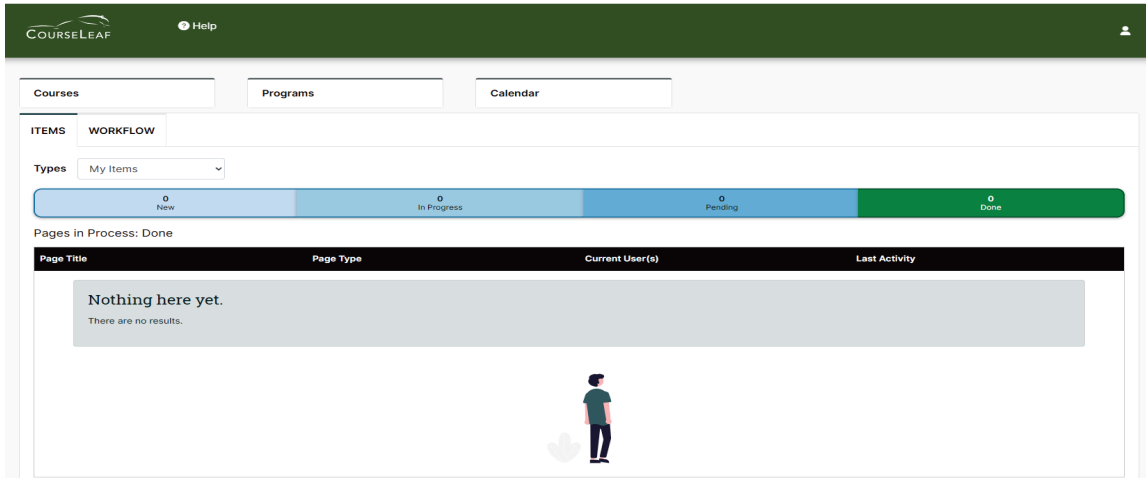
1. PHIL Chair
2. Arts Curriculum Committee Chair
3. Arts Faculty Executive
4. Arts Faculty Council Chair
5. University Curriculum Committee Chair
6. Senate Approval
7. Banner

**Approval Path**

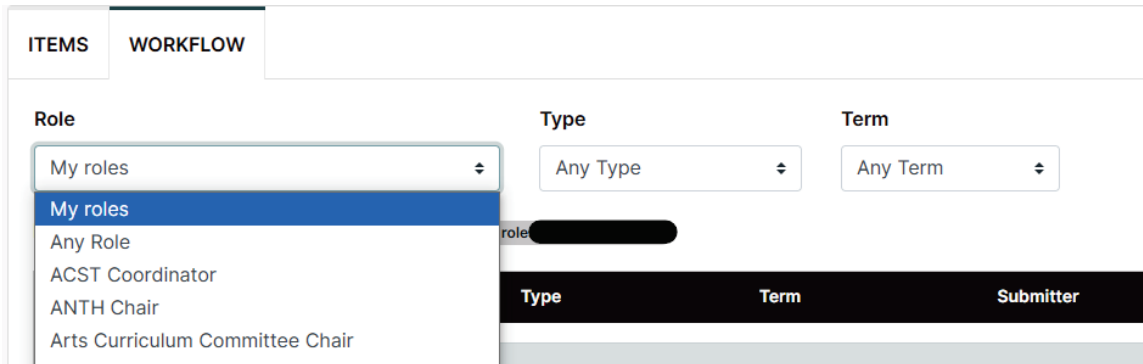
1. 03/21/25 11:38 am

## NOT APPROVER (REVIEW ONLY)

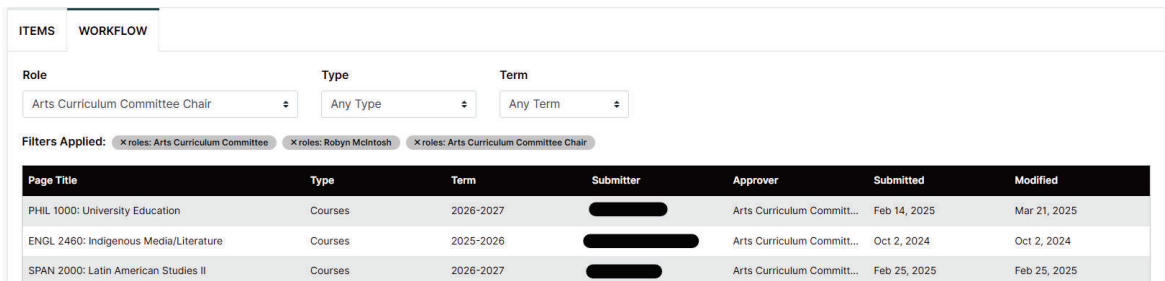
- If you are not an approver, you will need to select the proposals to review from the **Workflow** tab.



- 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.



Page Title	Type	Term	Submitter	Approver	Submitted	Modified
PHIL 1000: University Education	Courses	2026-2027	[Redacted]	Arts Curriculum Committ...	Feb 14, 2025	Mar 21, 2025
ENGL 2480: Indigenous Media/Literature	Courses	2025-2026	[Redacted]	Arts Curriculum Committ...	Oct 2, 2024	Oct 2, 2024
SPAN 2000: Latin American Studies II	Courses	2026-2027	[Redacted]	Arts Curriculum Committ...	Feb 25, 2025	Feb 25, 2025

- 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)

The screenshot shows a course proposal form for 'ACCT 2241 : Introductory Financial Acct'. The form includes fields for submission date, last edit, changes proposed by, catalog pages, subject code, department, faculty, academic level, credit hours, long title, abbreviated title, effective term, crosslisted with, description, prerequisites, notes, and reviewer comments. A workflow status section on the right lists the steps: 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. An approval path section on the right lists the steps: 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.

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

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

Last edit: 11/16/21 9:17 am

Changes proposed by: Shelley Clarke-Raftus (shelley.clarke-raftus)

**3** 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-1201 and either CISV-1225 or E661-1226 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

- ACCT Chair
- Sobey Curriculum Committee Chair
- Sobey Faculty Executive Chair
- Sobey Faculty Council Chair
- University Curriculum Committee Chair
- Senate Chair
- Registrar
- Banner

**8** Approval Path

- 11/16/21 9:29 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for ACCT Chair
- 11/16/21 9:29 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for Sobey Curriculum Committee Chair
- 11/16/21 9:30 am Shelley Clarke-Raftus (shelley.clarke-raftus): Approved for Sobey Faculty Executive Chair
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- 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)

The screenshot shows a web interface for viewing a program proposal. At the top, there are buttons for 'Export to PDF', 'Export to Word', and 'Share Proposal'. Below these, a red box highlights the 'Date Submitted' (11/17/21 10:21 am) and 'Viewing: CHEM : Chemistry' (1). A second red box highlights the 'Last approved' date (11/05/21 10:01 am) and 'Last edit' date (11/17/21 10:22 am) along with the name of the initiator (2). To the right, a 'Workflow' box lists roles: University Curriculum Committee Chair, Senate Chair, and Registrar (7). Below the workflow is a 'History' box showing a record for Nov 5, 2021, by Craig Jacobson. A 'Catalog Pages Using this Program' section lists 'Chemistry'. The main content area is divided into sections: 'Program Details' (Chemistry, CHEM, Undergraduate, Bachelor), 'Overview' (3), 'Program Requirements' (4), and 'Reviewer Comments' (6). The 'Overview' section contains text about the program's objectives and accreditation. The 'Program Requirements' section lists 'Major in Chemistry' and provides a table of required courses.

**1** Date Submitted: 11/17/21 10:21 am  
Viewing: **CHEM : Chemistry**

**2** Last approved: 11/05/21 10:01 am  
Last edit: 11/17/21 10:22 am  
Changes proposed by: [Redacted]

**7** In Workflow  
1. University Curriculum Committee Chair  
2. Senate Chair  
3. Registrar

History  
1. Nov 5, 2021 by Craig Jacobson

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. Minor

**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:

<a href="#">CHEM 1210</a>	General Chemistry I	3
Select three credits of the following:		3
<a href="#">CHEM 1211</a>	Gen Chem II for Physical Sci	
<a href="#">CHEM 1212</a>	Gen Chem II for Life Sciences	
<a href="#">CHEM 1213</a>	Gen Chem II for Engineering	

**5** Why are you proposing now 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.

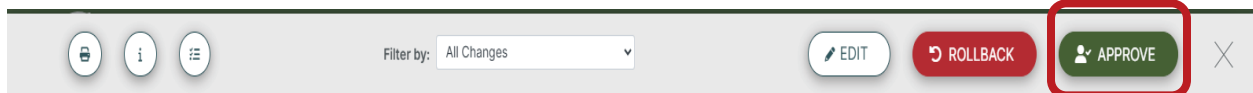
**5 – Reason for the edit or new proposal.**

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

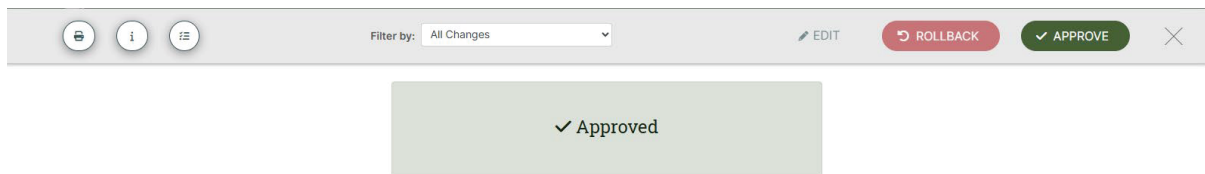
**7 – Workflow status.** Shows where the proposal is in the workflow process.

## 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.

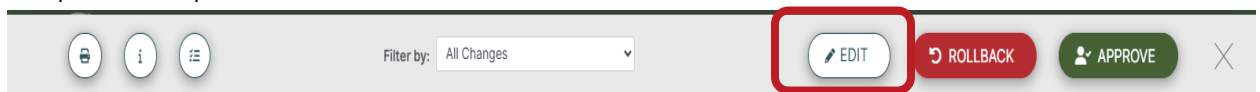


- If a user is not authorized to review an item and clicks **Approve**, it will generate a pop-up box saying that that person cannot act in that role.

## 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.

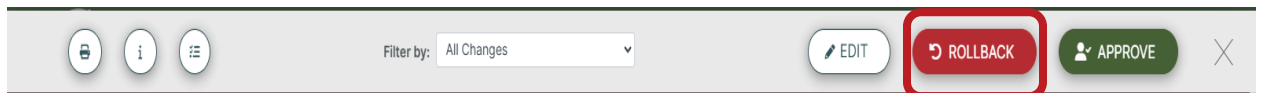


- Enter your edits or changes and click the **Save Changes** button at the bottom of the template.

## 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.