

# CIMS Routing Help

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## Save Form

1. When you are first initiating a CIMS form you can save it and come back to it later by going to "Retrieve Saved Forms" on the Main Menu.
2. Once a form has been routed to anyone, including yourself, if you want to save changes, route the form to yourself and retrieve it from "Courses requiring my approval" on the CIMS main menu.

## Initial Routing

1. Click the "Route Form Now" button. This takes you to a routing screen.
2. On the routing screen, type in the name of the person you want to route the form to. Click "Search." (The program searches the campus directory and displays names in a list below.) If you are not sure who to route to, call the department or unit and verify contact's name. Many departments use designees.
3. Choose an approval role for the person you are routing to (not your role).
4. Click the round button beside the name from the directory.
5. Click Route Now

## Normal Routing

1. At the bottom of the CIMS form, after the routing status, there are buttons for approval choices (approve, deny, re-route). Click the button that applies, and type in applicable comments.
2. Click the "Route Form Now" button. This takes you to a routing screen.
3. On the routing screen, type in the name of the person you want to route the form to. If you are not sure who to route to, call the department or unit and verify contact's name. Many departments use designees.
4. Click "Search." (The program searches the campus directory and displays names in a list below.)
6. Choose an approval role for the person you are routing to (not your role).
7. Click the round button beside the name from the directory.
8. Click Route Now

## Routing as a Designee

1. **If you are acting as a designee for someone (e.g., Department Chair), route the form to yourself and choose the role of the person you are acting as designee for (e.g. Department Chair or Designee).**
2. On the CIMS Main Menu, go to "Courses requiring my approval."
3. At the bottom of the CIMS form, after the routing status, there are buttons for approval choices (approve, deny, re-route). Click the button that applies, and type in the comments box the name of the person you are representing and that person's role. (e.g., Designee for Professor Joe Bruin, Chair, Philosophy Department.)
4. Click the "Route Form Now" button. This takes you to a routing screen.
5. On the routing screen, type in the name of the person you want to route the form to. Click "Search." (The program searches the campus directory and displays names in a list below.)
6. Choose an approval role for the person you are routing to (not your role or your designee role).
7. Click the round button beside the name from the directory.
8. Click Route Now

## Routing Multiple-listed Courses

1. Multiple-listed courses require the approval of all chairs, FECs, and deans involved with the course.
2. Coordinate the routing by calling or e-mailing the department coordinators for each department to be sure you know whom to route to. The College and each school may have different routing procedures and contacts.

## Withdrawing a CIMS Form

Only the initiator or staff from the Registrar's Office can withdraw (delete completely) a CIMS form. Call x67045 or x56704 for assistance.