



Evidence Inventory Management System (EIMS)

User Guide - Manager

Send Back Evidence Item

Overview

This document provides step-by-step instructions to guide Managers with reviewing and sending back an evidence item to contributors for further modifications.

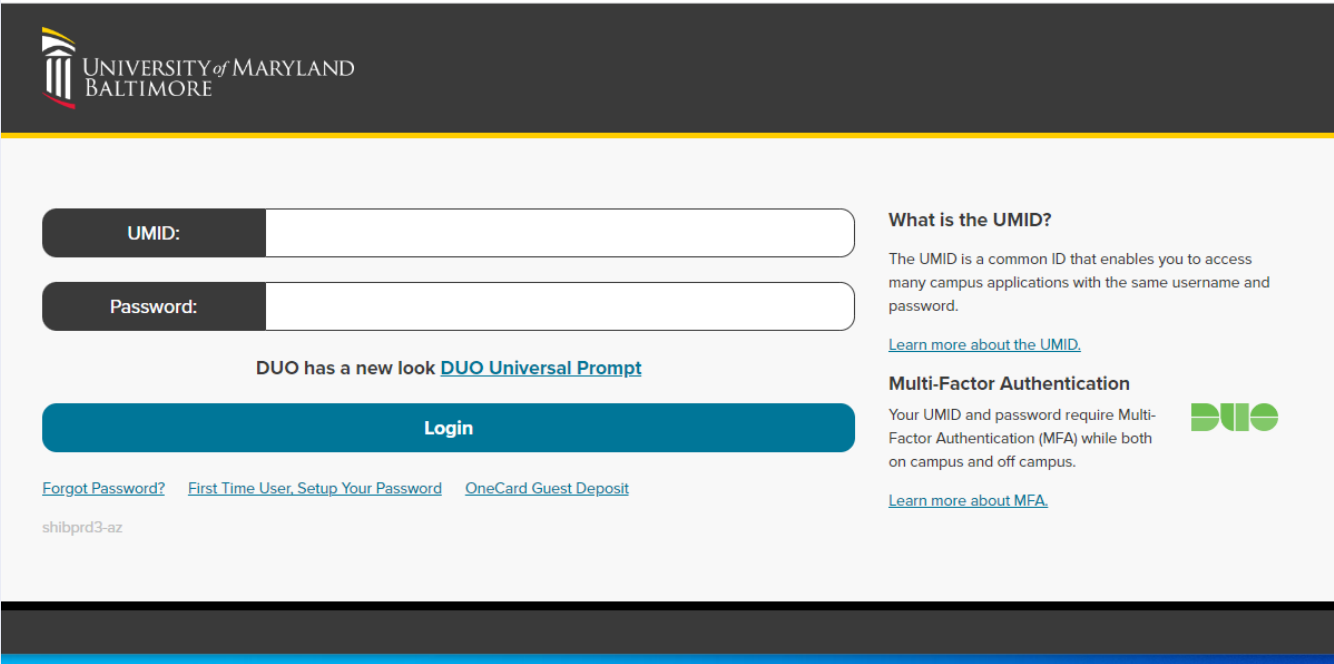
To proceed you must have authorized access to EIMS.

EIMS Support

For assistance or questions please send an email to all Members of the EIMS Support team.

- Greg Spengler - gspengler@umaryland.edu
- Michael Brown – michaelbrown@umaryland.edu

Logging In

Step	Instructions
1	<ul style="list-style-type: none">Open a browser and go to https://cfapps.umaryland.edu/eims/admin/evidenceByStandards/index.cfm
2	<ul style="list-style-type: none">Complete the UMID Multi-Factor Authentication by using your UMID and Password. 

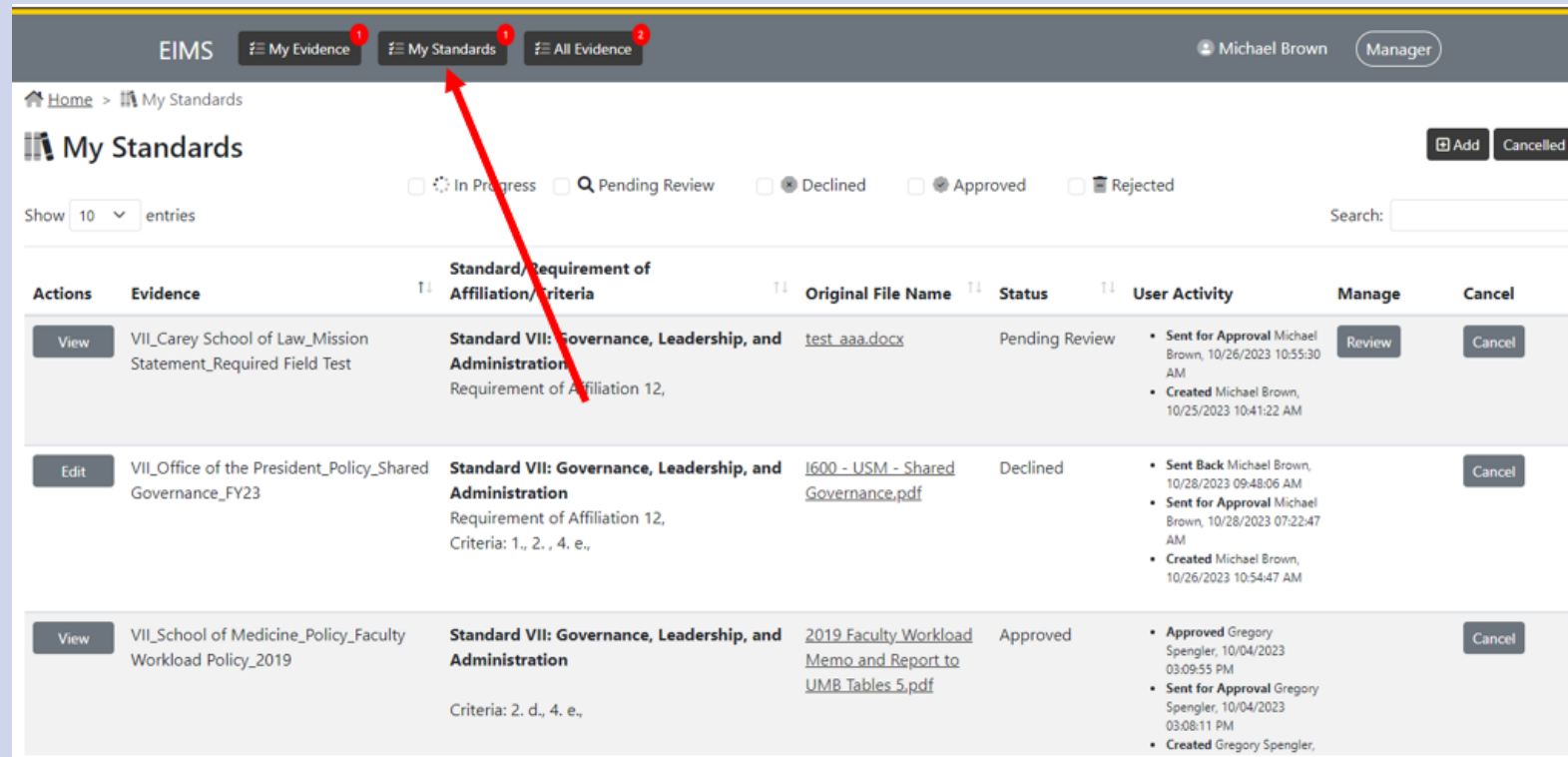
My Standards Landing Page

Step

Instructions

- The **My Standards** screen should appear.
- **Note:** If the **My Evidence** or **All Evidence** screen appears, Click the **My Standards** button to display the **My Standards** screen.

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EIMS My Evidence My Standards All Evidence Michael Brown Manager

Home > My Standards

My Standards

Add Cancelled

In Progress Pending Review Declined Approved Rejected

Show 10 entries Search:

Actions	Evidence	Standard/Requirement of Affiliation/Criteria	Original File Name	Status	User Activity	Manage	Cancel
View	VII_Carey School of Law_Mission Statement_Required Field Test	Standard VII: Governance, Leadership, and Administration Requirement of Affiliation 12,	test_aaa.docx	Pending Review	<ul style="list-style-type: none">Sent for Approval Michael Brown, 10/26/2023 10:55:30 AMCreated Michael Brown, 10/25/2023 10:41:22 AM	Review	Cancel
Edit	VII_Office of the President_Policy_Shared Governance_FY23	Standard VII: Governance, Leadership, and Administration Requirement of Affiliation 12, Criteria: 1., 2., 4. e.,	1600 - USM - Shared Governance.pdf	Declined	<ul style="list-style-type: none">Sent Back Michael Brown, 10/28/2023 09:48:06 AMSent for Approval Michael Brown, 10/28/2023 07:22:47 AMCreated Michael Brown, 10/26/2023 10:54:47 AM		Cancel
View	VII_School of Medicine_Policy_Faculty Workload Policy_2019	Standard VII: Governance, Leadership, and Administration Criteria: 2. d., 4. e.,	2019 Faculty Workload Memo and Report to UMB Tables 5.pdf	Approved	<ul style="list-style-type: none">Approved Gregory Spengler, 10/04/2023 03:09:55 PMSent for Approval Gregory Spengler, 10/04/2023 03:08:11 PMCreated Gregory Spengler,		Cancel

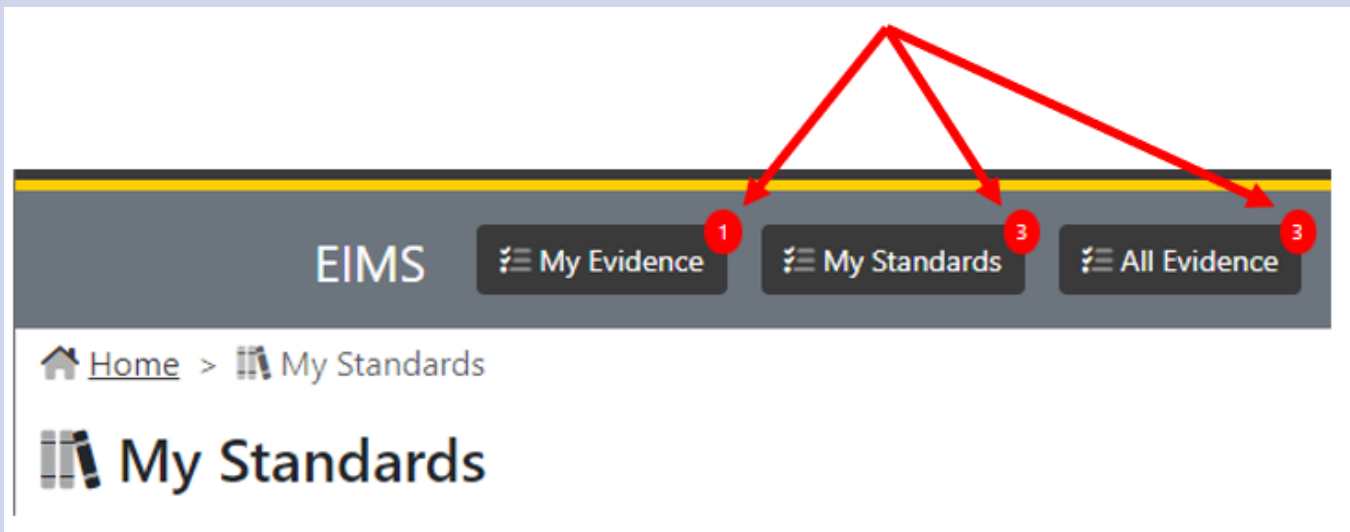
Number of Items Sent Back (Declined)

Step

Instructions

- The number in the red circle located in the upper right corner of each of the 3 buttons indicates the number of items that have been sent back to the contributors for further modifications (i.e., Status = “declined”).
- In the example below:
 - My Evidence : You have 1 item that has been sent back (typically by another assigned manager)
 - My Standards: There are 3 items that have been sent back for the standard(s) assigned to you.
 - All Evidence: There are 3 items that have been sent back for all standards.

4



Review & Send Back Evidence Item

Step

Instructions

- To facilitate locating the items sent for approval, click the Pending Review checkbox to filter the list of items.
- In this example, the list has been reduced from 4 items to the 1 item submitted for approval.

5

Home > My Standards

My Standards

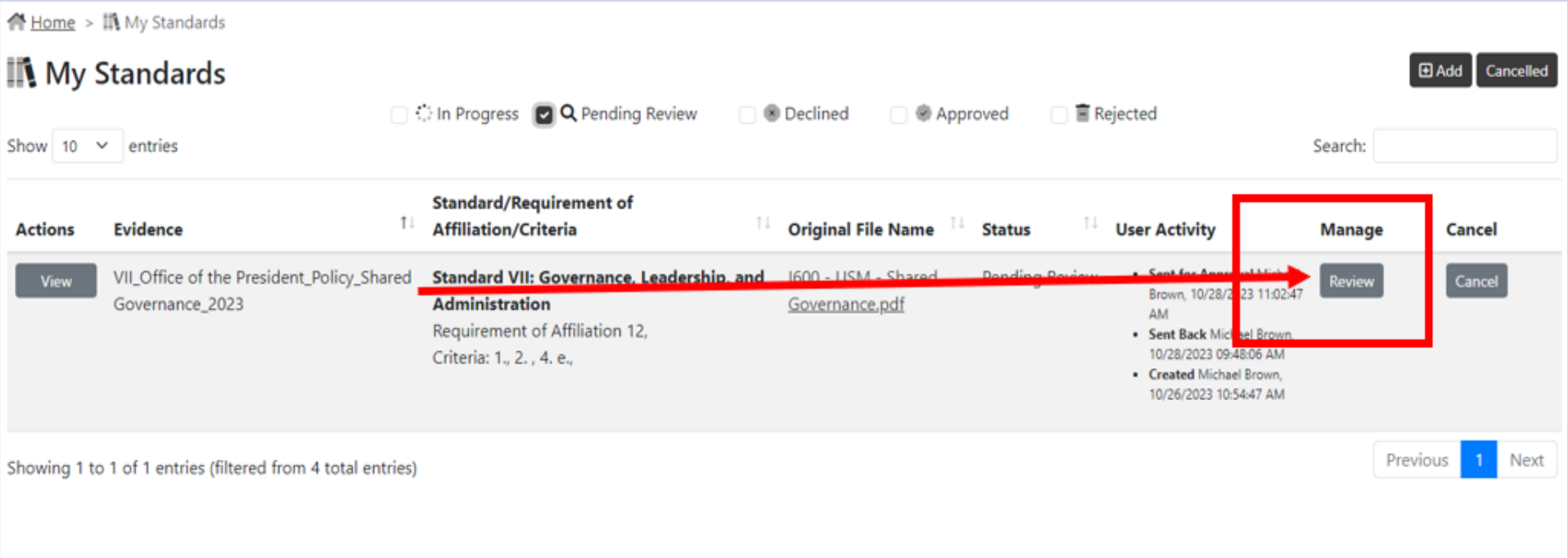
In Progress Pending Review Declined Approved Rejected

Show 10 entries Search:

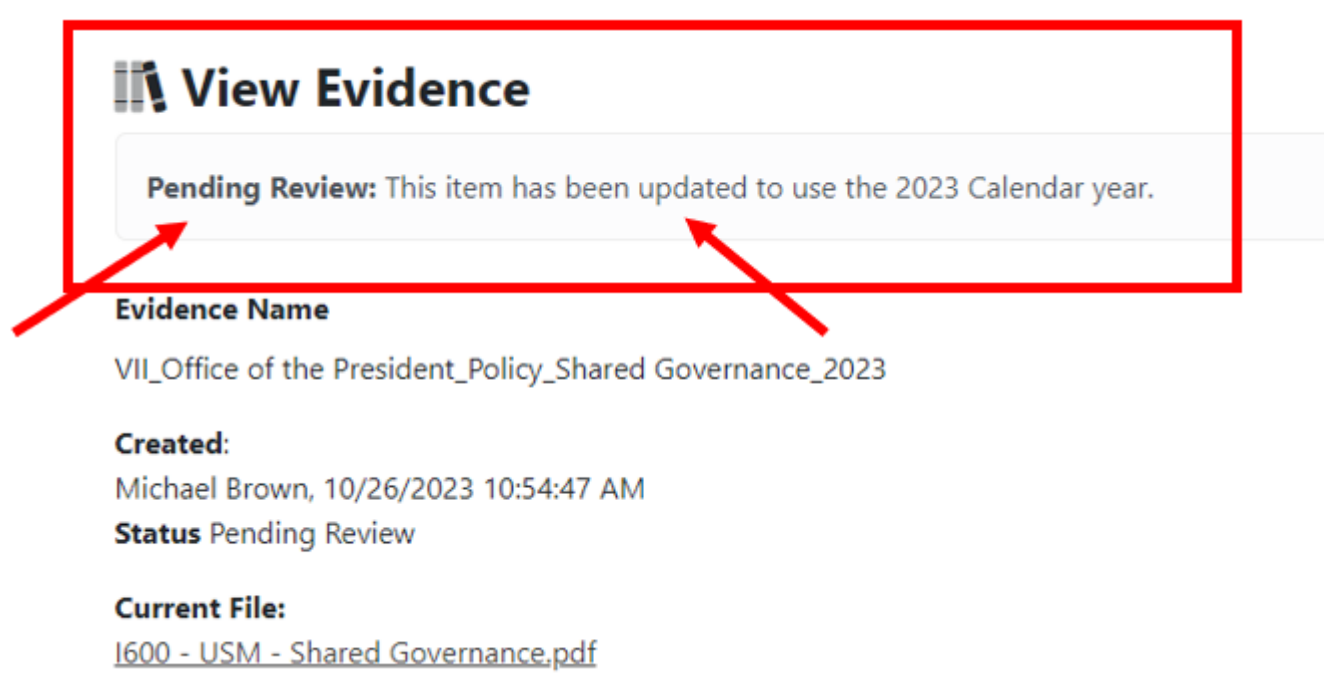
Actions	Evidence	Standard/Requirement of Affiliation/Criteria	Original File Name	Status	User Activity	Manage	Cancel
View	VII_Office of the President_Policy_Shared Governance_2023	Standard VII: Governance, Leadership, and Administration Requirement of Affiliation 12, Criteria: 1., 2., 4., e.,	1600 - USM - Shared Governance.pdf	Pending Review	<ul style="list-style-type: none">• Sent for Approval Michael Brown, 10/28/2023 11:02:47 AM• Sent Back Michael Brown, 10/28/2023 09:48:06 AM• Created Michael Brown, 10/26/2023 10:54:47 AM	Review	Cancel

Showing 1 to 1 of 1 entries (filtered from 4 total entries) Previous 1 Next

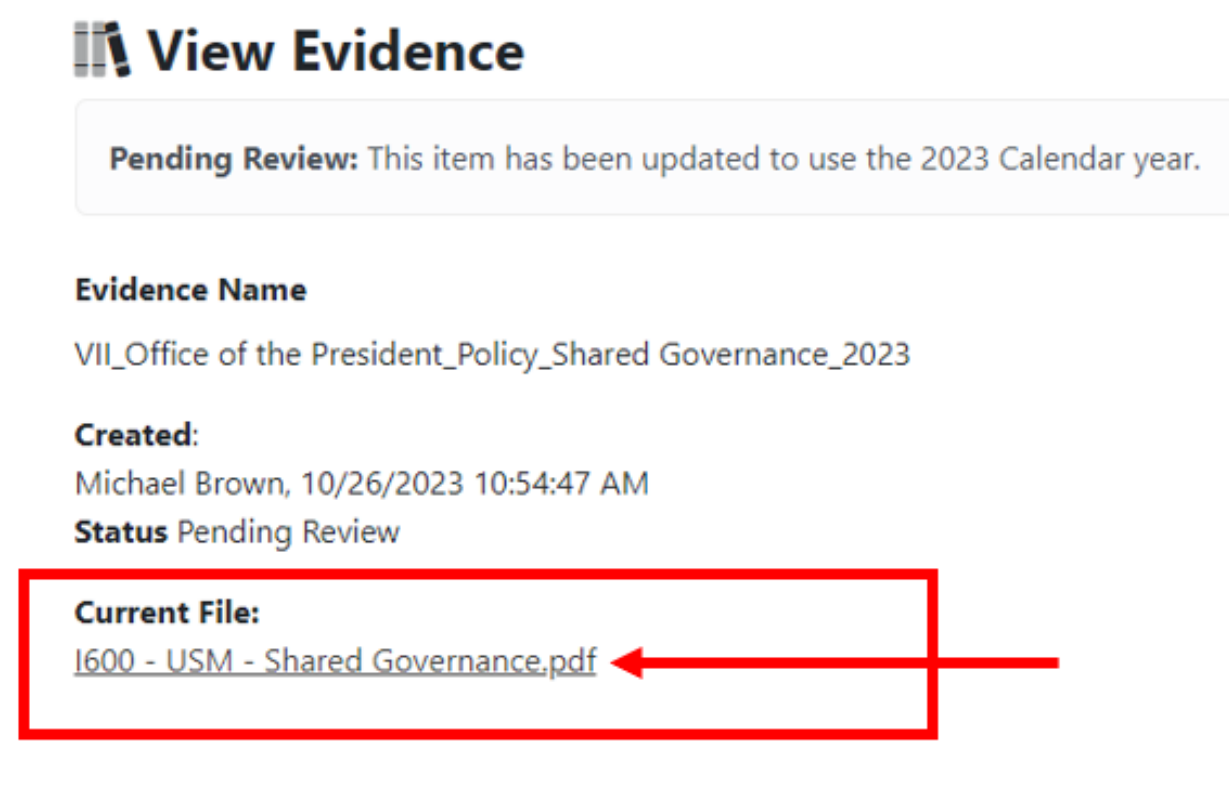
Review & Send Back Evidence Item

Step	Instructions
6	<ul style="list-style-type: none">To select an item for review and to send back, click the item's Review button located in the Manage column.  <p>The screenshot shows the 'My Standards' interface. At the top, there are navigation links for 'Home' and 'My Standards', and buttons for 'Add' and 'Cancelled'. Below this, there are filters for 'In Progress', 'Pending Review' (checked), 'Declined', 'Approved', and 'Rejected'. A search bar is on the right. The main table has columns: 'Actions', 'Evidence', 'Standard/Requirement of Affiliation/Criteria', 'Original File Name', 'Status', 'User Activity', 'Manage', and 'Cancel'. The first row shows a 'View' button, evidence text, standard details, file name 'I600 - USM - Shared Governance.pdf', status 'Pending Review', and user activity. The 'Review' button in the 'Manage' column is highlighted with a red box, and a red arrow points from the text 'Review button' in the instructions to it. At the bottom, there are 'Previous', '1', and 'Next' navigation buttons.</p>

Review & Send Back Evidence Item

Step	Instructions
7	<ul style="list-style-type: none"><li data-bbox="428 361 2186 404">• The View Evidence screen will appear. The Evidence Item's status should show as Pending Review.<li data-bbox="428 462 2033 505">• The most recent comment, if one exists, will appear next to the "Pending Review" status.  <p>The screenshot shows the 'View Evidence' interface. At the top, there is a header 'View Evidence' with a list icon. Below it, a message box states 'Pending Review: This item has been updated to use the 2023 Calendar year.' Below the message box, the following details are listed: 'Evidence Name: VII_Office of the President_Policy_Shared Governance_2023', 'Created: Michael Brown, 10/26/2023 10:54:47 AM', 'Status: Pending Review', and 'Current File: I600 - USM - Shared Governance.pdf'. A red box highlights the 'View Evidence' header and the 'Pending Review' message box. Two red arrows point from the bottom corners of the red box to the 'Pending Review' message.</p>

Review & Send Back Evidence Item

Step	Instructions
8	<ul style="list-style-type: none"><li data-bbox="351 362 1989 401">• To view the Evidence Item's selected file, click the name of the file listed under Current File.<li data-bbox="351 462 1931 501">• Nearly all files should be viewable in the browser. A separate browser tab should open. <div data-bbox="708 548 1931 1333"><p>View Evidence</p><p>Pending Review: This item has been updated to use the 2023 Calendar year.</p><p>Evidence Name VII_Office of the President_Policy_Shared Governance_2023</p><p>Created: Michael Brown, 10/26/2023 10:54:47 AM</p><p>Status Pending Review</p><p>Current File: <u>1600 - USM - Shared Governance.pdf</u> ←</p></div>

Review & Send Back Evidence Item

Step

Instructions

8.1

View Evidence | EIMS x I600 - USM - Shared Governanc... x +

cfappsdev.umaryland.edu/eims/uploads/I600%20-%20USM%20-%20Shared%20Governance.pdf

Analytics - SPoint -... OACS Data Cookbook Quantum Analytcis EDI Analytics Sites CITS Analytics Leave Cal... Data Dashboard - E...

I600 - USM - Shared Governance.pdf 2 / 6 100%

<https://www.usmd.edu/regents/bylaws/SectionI/I600.html?t=print.php>

10/26/23, 8:55 AM I600 - USM

I - 6.00 POLICY ON SHARED GOVERNANCE IN THE UNIVERSITY SYSTEM OF MARYLAND

(Approved by the Board of Regents October 4, 1996; Amended on August 25, 2000)

I. PURPOSE

The University System of Maryland (USM) consists of 13 institutions with distinct but complementary missions. The Board of Regents recognizes the distinct and complementary roles that the Regents, the Chancellor, the Presidents, other administrators, the faculty, the staff, and students have in governing the USM institutions.

Moreover, the Board also recognizes that as higher education

Review & Send Back Evidence Item

Step

Instructions

- Read the Evidence Item's **Description** and the **selected options** for the Standard. If any of the evidence item's information is insufficient, proceed to send back the item.

Description:

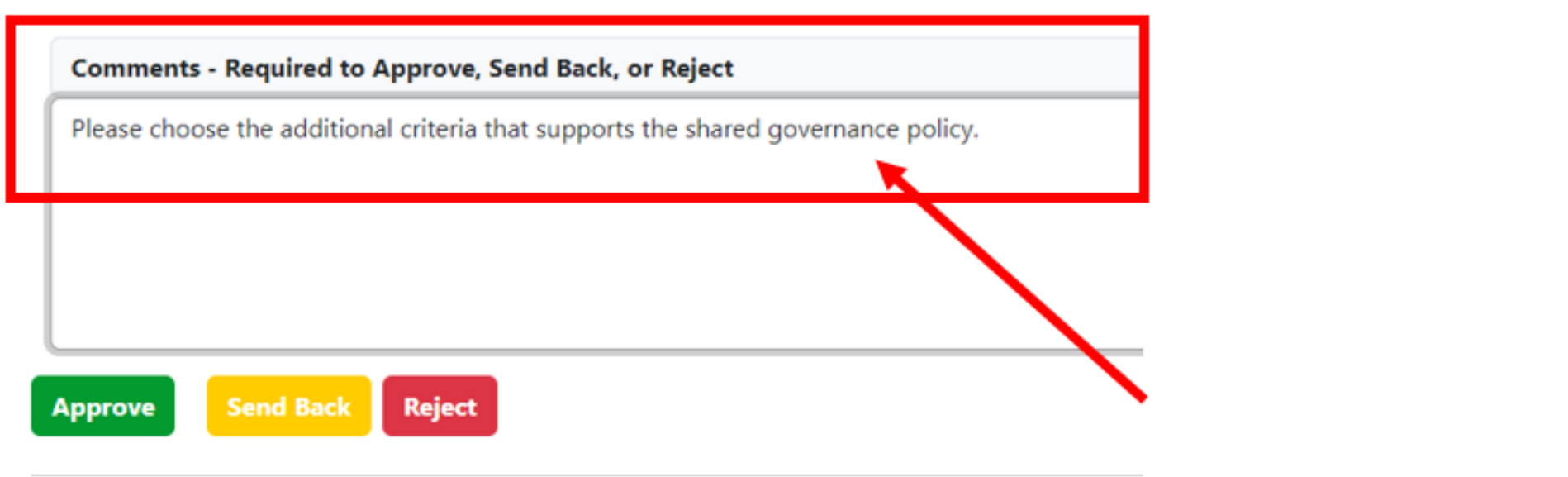
USM's & UMB's policy on shared governance fully discloses the legally constituted governance structure. This policy list the fundamental principles for shared governance and the Board of Regents authority and responsibility to ensure these principles apply to all levels of the institution. The policy establishes the opportunities that faculty, staff, and students shall have to participate, appropriate to their special knowledge and expertise, in decisions that relate to key institutional activities (e.g., mission, budget, curriculum, course content, instruction, research, appointment, promotion, retention, hiring of administrators, etc.). Governance practices are clearly articulated.

Standard(s)

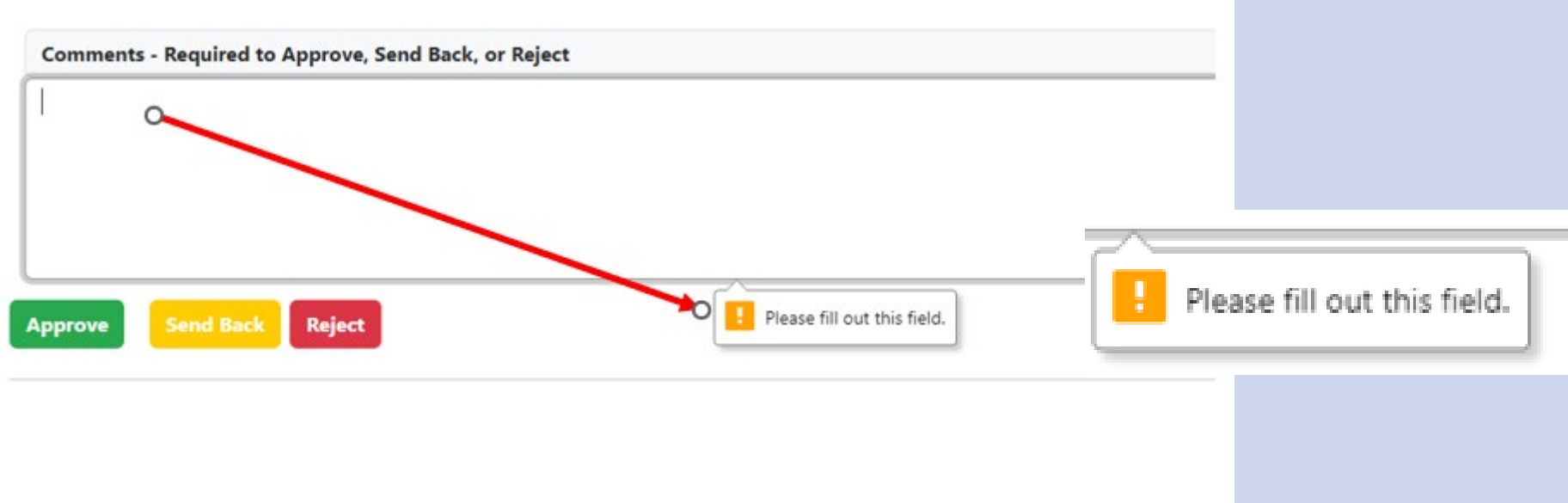
Standard VII: Governance, Leadership, and Administration

- **Requirement of Affiliation 12** The institution fully discloses its legally constituted governance structure(s) including any related entities (including without limitation systems, religious sponsorship, and corporate ownership). The institution's governing body is responsible for the quality and integrity of the institution and for ensuring that the institution's mission is being accomplished.
- **1.** a clearly articulated and transparent governance structure that outlines roles, responsibilities, and accountability for decision making by each constituency, including governing body, administration, faculty, staff and students;
- **2.** a legally constituted governing body that:
- **4. e.** regular engagement with faculty and students in advancing the institution's goals and objectives;

Review & Send Back Evidence Item

Step	Instructions
10	<ul style="list-style-type: none"><li data-bbox="428 362 1447 401">• A comment is required to send back the Evidence Item.<li data-bbox="428 462 2395 604">• Scroll down to the Comments – Required to Approve, Send Back or Reject text box, and enter a comment that explains why the evident item is being sent back and provide any guidance to aid the contributor(s) with making the necessary modifications for subsequent approval. <div data-bbox="486 654 2374 1225"><p>The screenshot displays a user interface for reviewing evidence items. At the top, there is a header titled "Comments - Required to Approve, Send Back, or Reject". Below this header is a text input field with the placeholder text "Please choose the additional criteria that supports the shared governance policy." A red rectangular box highlights the entire comment section, and a red arrow points from the right side of the box towards the text input field. At the bottom of the interface, there are three buttons: "Approve" (green), "Send Back" (yellow), and "Reject" (red).</p></div>

Review & Send Back Evidence Item

Step	Instructions
11	<ul style="list-style-type: none"><li data-bbox="428 361 1714 404">• If a comment is not provided, the following error message will appear.  <p>The screenshot shows a web interface for reviewing evidence items. At the top, there is a header 'Comments - Required to Approve, Send Back, or Reject'. Below this is a large text input field. To the right of the input field, there is a small error message box that says 'Please fill out this field.' with an exclamation mark icon. A red arrow points from the error message box to the input field. Below the input field, there are three buttons: 'Approve' (green), 'Send Back' (yellow), and 'Reject' (red). Below the buttons, there is another error message box that says 'Please fill out this field.' with an exclamation mark icon.</p>

Review & Send Back Evidence Item

Step	Instructions
12	<ul style="list-style-type: none">After entering a comment, click the Yellow Send Back button. 

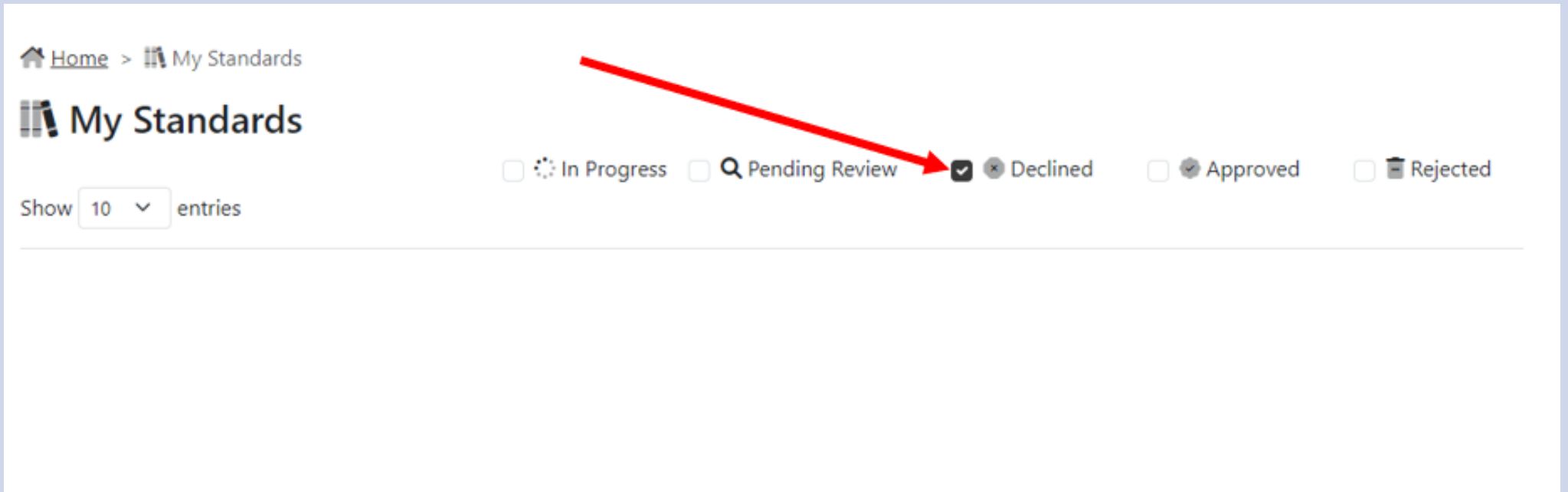
Review & Send Back Evidence Item

Step

Instructions

- The **My Standards** screen should appear.
- Click the **Declined check box**, to filter the list of items to only those that have been **sent back**.

13



Review & Send Back Evidence Item

Step

Instructions

- **Verify** the item is listed as **declined**.
- The **manager's name** for who sent back the item, **date and time** of the item being declined are displayed.



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The screenshot displays the EIMS 'My Standards' interface. At the top, there are navigation tabs for 'My Evidence', 'My Standards', and 'All Evidence'. The user is identified as Michael Brown, Manager. The main section shows a list of standards with filters for 'In Progress', 'Pending Review', 'Declined', 'Approved', and 'Rejected'. The 'Declined' filter is selected. A table lists the evidence items, with one item highlighted in grey. Red arrows point from the 'Declined' status and the 'User Activity' column to the corresponding text in the instructions above.

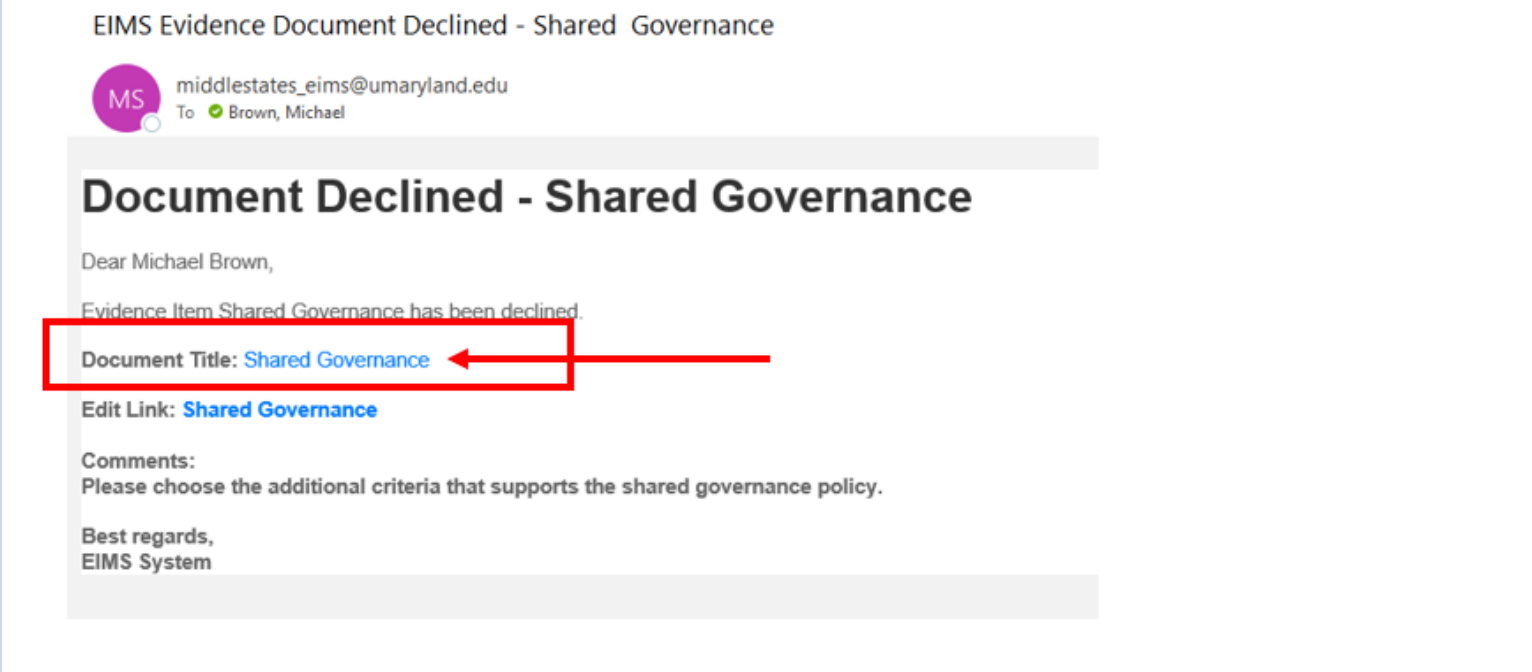
Actions	Evidence	Standard/Requirement of Affiliation/Criteria	Original File Name	Status	User Activity	Manage	Cancel
Edit	VII_Office of the President_Policy_Shared Governance_2023	Standard VII: Governance, Leadership, and Administration Requirement of Affiliation 12, Criteria: 1., 2., 4. e.,	I600 - USM - Shared Governance.pdf	Declined	<ul style="list-style-type: none">• Sent Back Michael Brown, 10/28/2023 04:52:34 PM• Sent for Approval Michael Brown, 10/28/2023 04:42:16 PM• Created Michael Brown, 10/28/2023 04:42:16 PM	Cancel	Cancel

Showing 1 to 1 of 1 entries (filtered from 5 total entries)

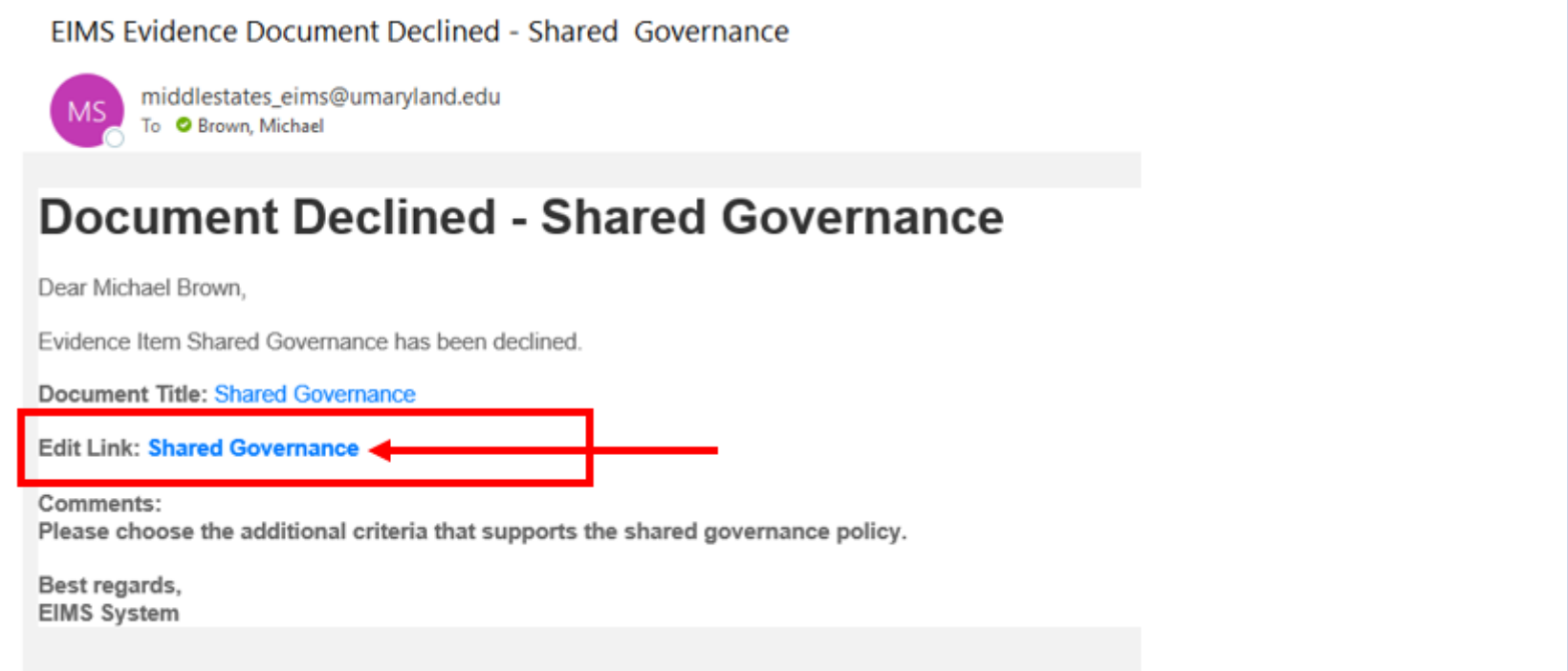
Review & Send Back Evidence Item

Step	Instructions
15	<ul style="list-style-type: none"><li data-bbox="428 361 2384 449">An email notification will be sent to the standard's assigned managers and all assigned contributors indicating that the item has been sent back for further modifications. <div data-bbox="509 491 1735 1226"><p data-bbox="537 511 1352 539">EIMS Evidence Document Declined - Shared Governance</p><p data-bbox="537 572 1034 654"> middlestates_eims@umaryland.edu To  Brown, Michael</p><hr/><h2 data-bbox="524 705 1589 753">Document Declined - Shared Governance</h2><p data-bbox="524 793 754 822">Dear Michael Brown,</p><p data-bbox="524 853 1123 882">Evidence Item Shared Governance has been declined.</p><p data-bbox="524 911 945 939">Document Title: Shared Governance</p><p data-bbox="524 968 881 996">Edit Link: Shared Governance</p><p data-bbox="524 1032 1480 1089">Comments: Please choose the additional criteria that supports the shared governance policy.</p><p data-bbox="524 1118 682 1175">Best regards, EIMS System</p></div>

Review & Send Back Evidence Item

Step	Instructions
16	<ul style="list-style-type: none">The Document Title within the email notification is a clickable link to directly access the item.The View Item screen will appear after clicking the link. 

Review & Send Back Evidence Item

Step	Instructions
17	<ul style="list-style-type: none">An Edit Link is included within the email notification and is a clickable link to directly access the item for editing.The Edit Item screen will appear after clicking the link.  <p>The screenshot shows an email from 'middlestates_eims@umaryland.edu' to 'Brown, Michael'. The subject is 'Document Declined - Shared Governance'. The body text reads: 'Dear Michael Brown, Evidence Item Shared Governance has been declined. Document Title: Shared Governance. Edit Link: Shared Governance'. The 'Edit Link' is highlighted with a red box and a red arrow pointing to it. Below the link, there are comments: 'Comments: Please choose the additional criteria that supports the shared governance policy.' and a sign-off: 'Best regards, EIMS System'.</p>

Review & Send Back Evidence Item

Step	Instructions
18	<p data-bbox="1141 476 1702 551">End of Tutorial</p> 