



# **Evidence Inventory Management System (EIMS)**

## **User Guide - Manager**

### **Approve Evidence Item**

# Overview

This document provides step-by-step instructions to guide Managers with reviewing and approving an evidence.

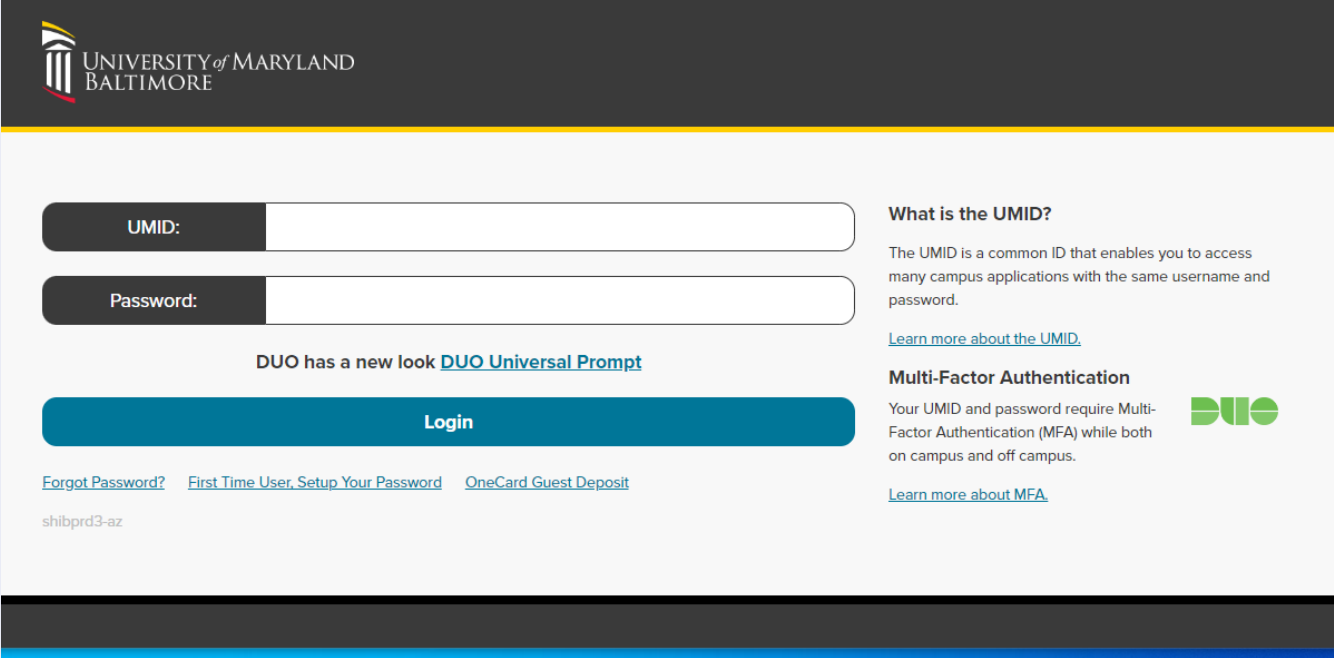
To proceed you must have authorized access to EIMS.

# EIMS Support

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

- Greg Spengler - [gspengler@umaryland.edu](mailto:gspengler@umaryland.edu)
- Michael Brown – [michaelbrown@umaryland.edu](mailto:michaelbrown@umaryland.edu)

# Logging In

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

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

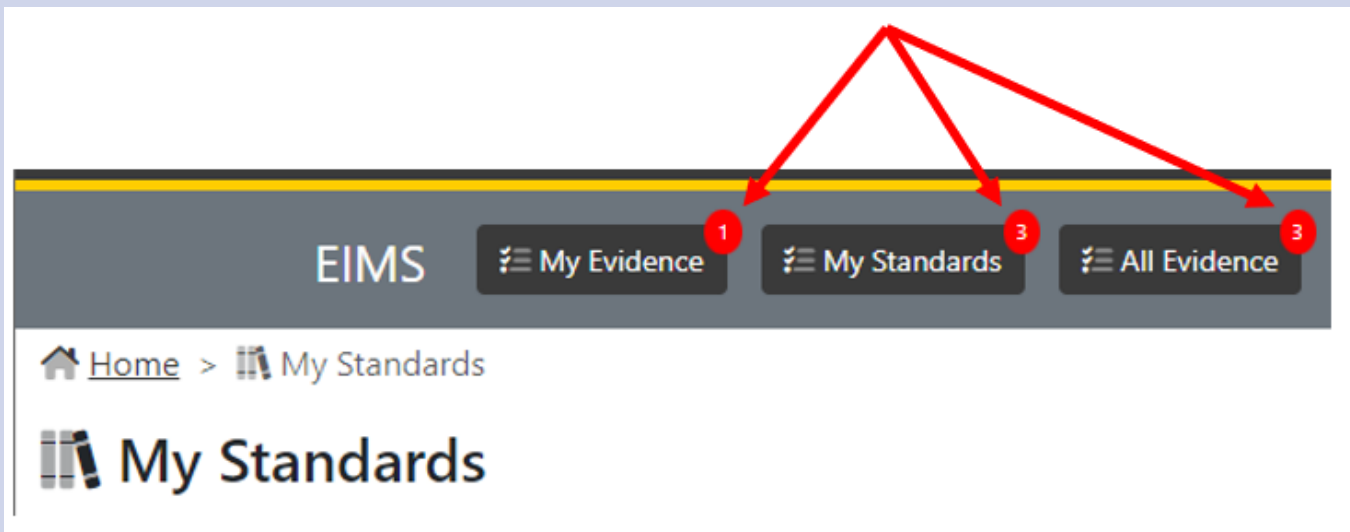
# Number of Items Sent Back (Declined)

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.

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# Review & Approve 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.

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

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

# Review & Approve Evidence Item

## Step

## Instructions

- To select an item for review & approval, click the item's **Review button** located in the **Manage column**.

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Home > My Standards

### My Standards

In Progress  Pending Review  Declined  Approved  Rejected

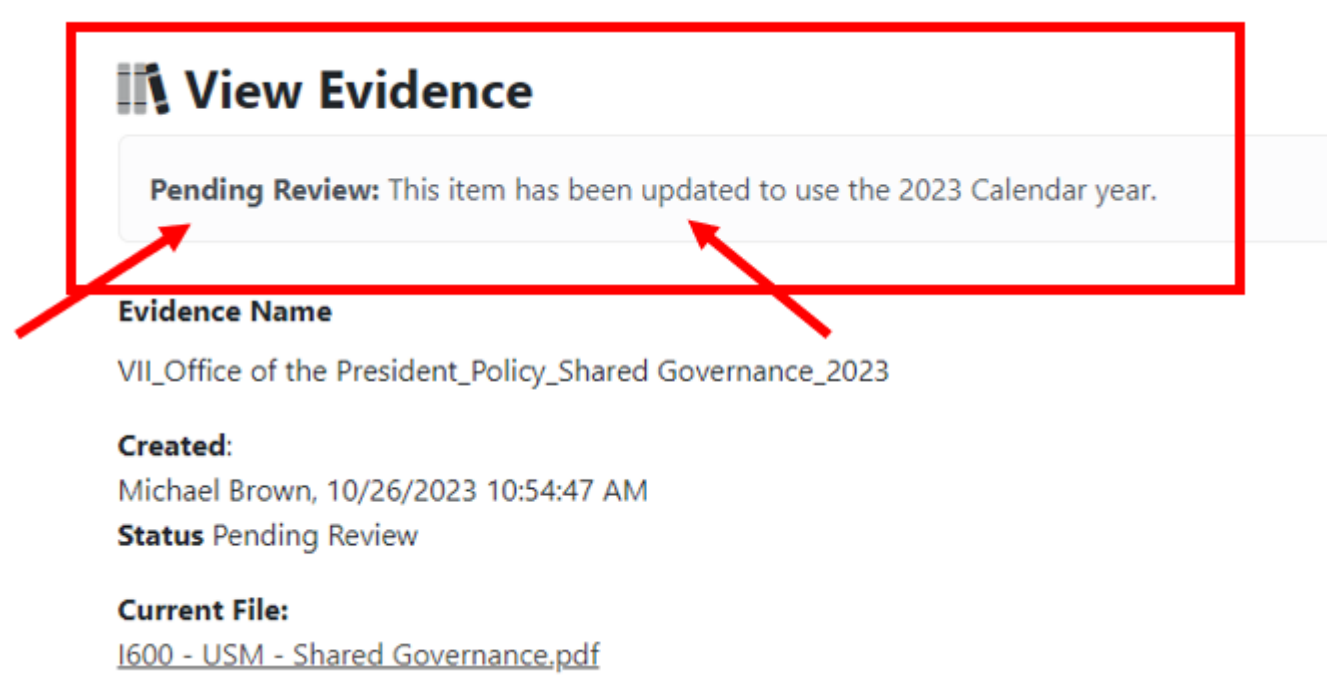
Show 10 entries Search:

Actions	Evidence	Standard/Requirement of Affiliation/Criteria	Original File Name	Status	User Activity	Manage	Cancel
<input type="button" value="View"/>	VII_Office of the President_Policy_Shared Governance_2023	<b>Standard VII: Governance, Leadership, and Administration</b> Requirement of Affiliation 12, Criteria: 1., 2., 4. e.,	I600 - LSM - Shared Governance.pdf	Pending Review	<ul style="list-style-type: none"><li>Sent for Approval Michael Brown, 10/28/2023 11:02:47 AM</li><li>Sent Back Michael Brown 10/28/2023 09:48:06 AM</li><li>Created Michael Brown, 10/26/2023 10:54:47 AM</li></ul>	<input type="button" value="Review"/>	<input type="button" value="Cancel"/>

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



# Review & Approve Evidence Item

Step	Instructions
7	<ul style="list-style-type: none"><li data-bbox="428 361 2186 404">• The <b>View Evidence</b> screen will appear. The <b>Evidence Item's status</b> should show as <b>Pending Review</b>.</li><li data-bbox="428 462 2028 505">• The <b>most recent comment</b>, <b>if one exists</b>, will appear next to the "Pending Review" status.</li></ul>  <p>The screenshot shows the 'View Evidence' interface. At the top, there is a header 'View Evidence' with a document icon. Below it, a comment box contains the text: 'Pending Review: This item has been updated to use the 2023 Calendar year.' Below the comment, 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: <a href="#">I600 - USM - Shared Governance.pdf</a>'. A red box highlights the comment area, and two red arrows point to the comment text.</p>

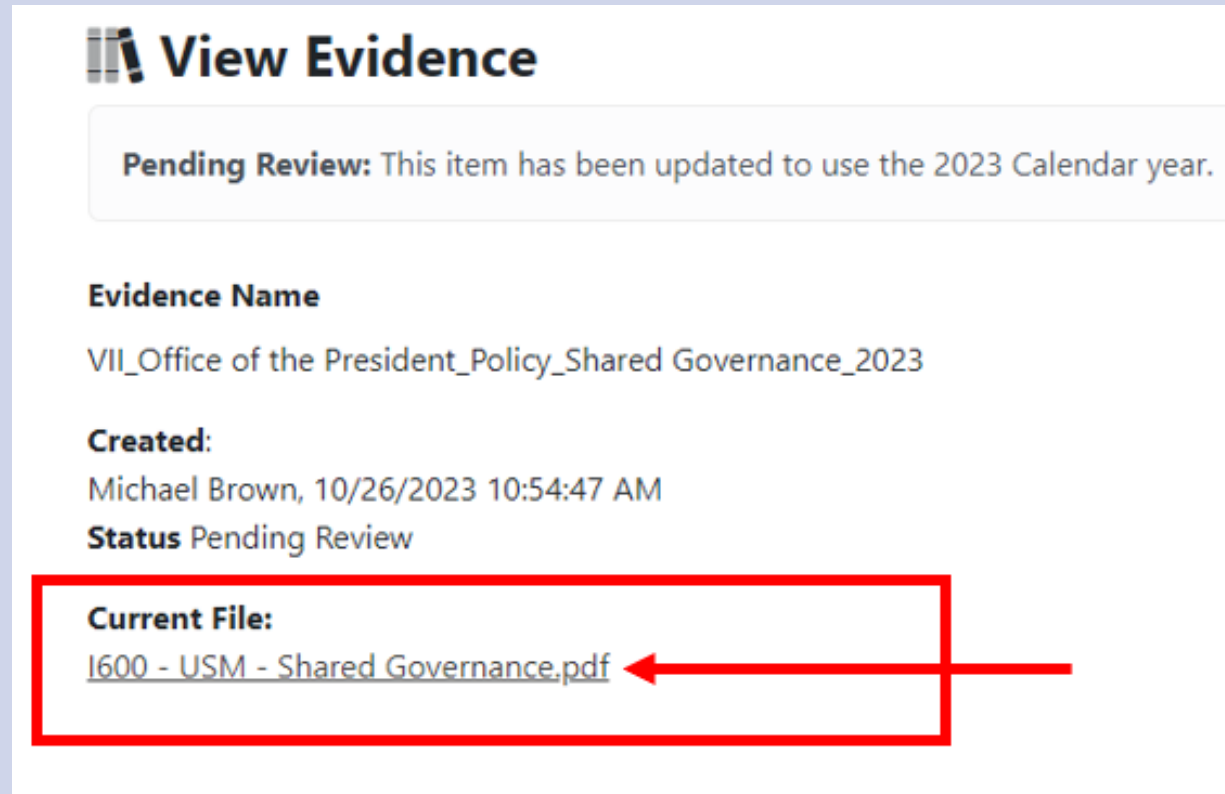
# Review & Approve Evidence Item

Step

Instructions

- To **view the Evidence Item's selected file**, click the name of the file listed under **Current File**.
- Nearly all files should be viewable in the browser. A separate browser tab should open.

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**View Evidence**

**Pending Review:** This item has been updated to use the 2023 Calendar year.

**Evidence Name**  
VII\_Office of the President\_Policy\_Shared Governance\_2023

**Created:**  
Michael Brown, 10/26/2023 10:54:47 AM

**Status** Pending Review

**Current File:**  
[1600 - USM - Shared Governance.pdf](#)

# Review & Approve Evidence Item

Step

Instructions

8.1

The screenshot shows a web browser window with two tabs: 'View Evidence | EIMS' and 'I600 - USM - Shared Governance'. The address bar shows the URL: [cfappsdev.umaryland.edu/eims/uploads/I600%20-%20USM%20-%20Shared%20Governance.pdf](https://cfappsdev.umaryland.edu/eims/uploads/I600%20-%20USM%20-%20Shared%20Governance.pdf). The browser's bookmark bar includes items like 'Analytics - SPoint', 'OACS', 'Data Cookbook', 'Quantum Analytiscs', 'EDI', 'Analytics Sites', 'CITS', 'Analytics Leave Cal...', and 'Data Dashboard - E...'. The main content area displays a PDF viewer for 'I600 - USM - Shared Governance.pdf', showing page 2 of 6 at 100% zoom. The PDF content includes a header with the URL <https://www.usmd.edu/regents/bylaws/SectionI/I600.html?t=print.php>, a date '10/26/23, 8:55 AM', and the text 'I600 - USM'. The main text reads: '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)'. Below this, it states 'I. PURPOSE' and describes the University System of Maryland (USM) as consisting of 13 institutions with distinct but complementary missions. A red arrow points from the browser tab title to the PDF content.

# Review & Approve Evidence Item

## Step

## Instructions

- Read the Evidence Item's **Description** and the **selected options** for the Standard. If all of the evidence item's information is sufficient, proceed to approve the item.

### Description:

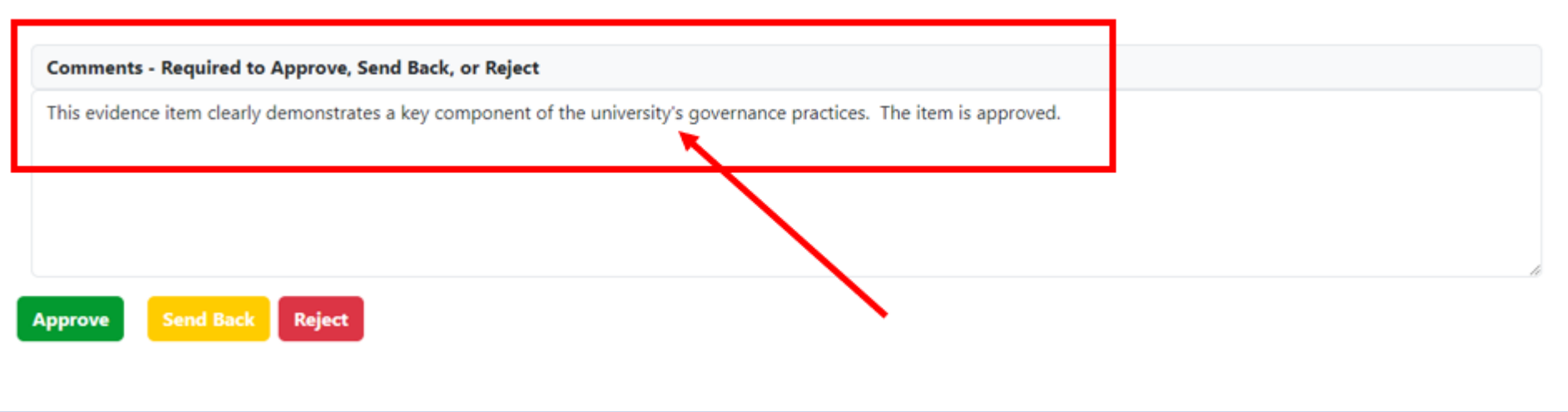
USM's & UMB's policy on shared governance fully discloses the legally constituted governance structure. This policy list the fundamental principles for shared governance and the Board of Regents authority and responsibility to ensure these principles apply to all levels of the institution. The policy 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)

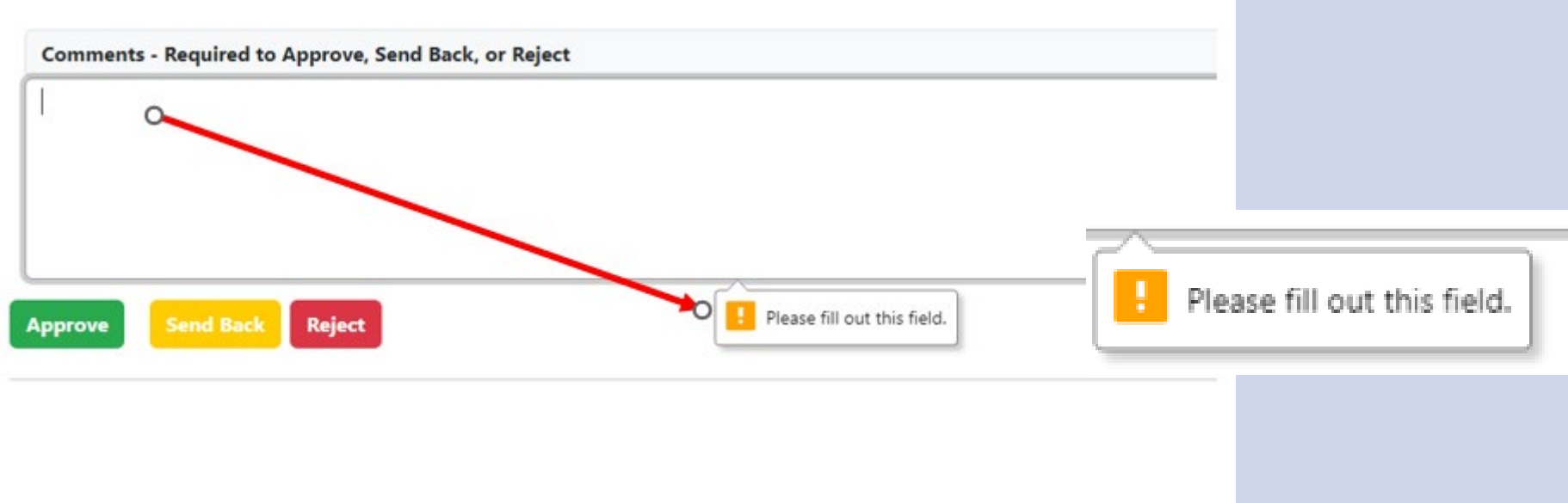
#### Standard VII: Governance, Leadership, and Administration

- **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;

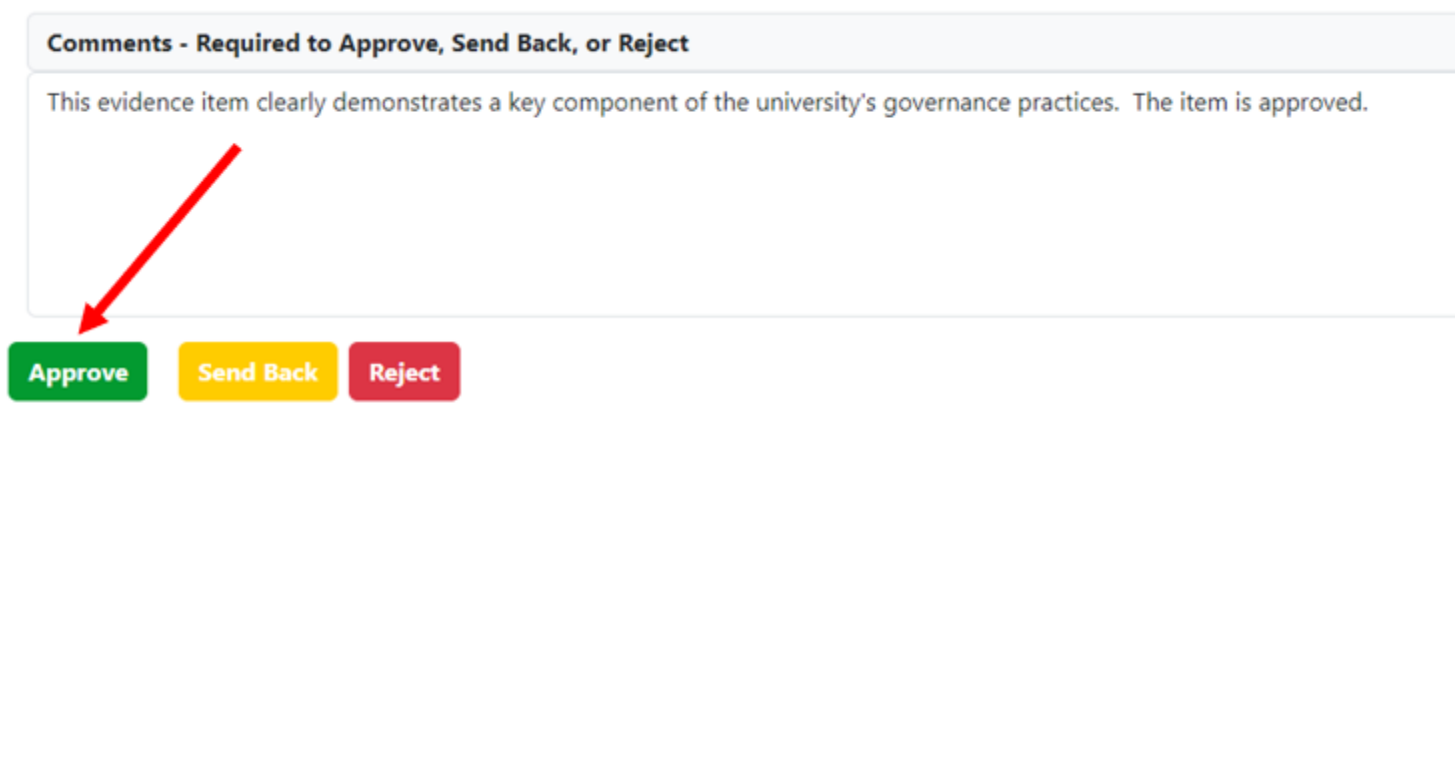
# Review & Approve Evidence Item

Step	Instructions
10	<ul style="list-style-type: none"><li data-bbox="428 361 1421 404">• A comment is required to approve the Evidence Item.</li><li data-bbox="428 464 2395 554">• Scroll down to the Comments – Required to Approve, Send Back or Reject text box, and enter a comment that supports the approval of the Evidence Item.</li></ul>  <p>The screenshot shows a web interface for reviewing an evidence item. It features a text input field with the following content: "Comments - Required to Approve, Send Back, or Reject" and "This evidence item clearly demonstrates a key component of the university's governance practices. The item is approved." Below the text box are three buttons: "Approve" (green), "Send Back" (yellow), and "Reject" (red). A red box highlights the text input area, and a red arrow points from the bottom right towards the text box.</p>

# Review & Approve Evidence Item

Step	Instructions
11	<ul style="list-style-type: none"><li data-bbox="428 358 1717 404">• If a <b>comment is not provided</b>, the following <b>error message will appear</b>.</li></ul>  <p>The screenshot displays a web form titled "Comments - Required to Approve, Send Back, or Reject". It features a large, empty text input field. Below the field are three buttons: "Approve" (green), "Send Back" (yellow), and "Reject" (red). A red arrow points from the top-left corner of the text field to a small error icon (a white exclamation mark in an orange square) located at the bottom-right corner of the field. A tooltip box with a white background and a grey border is positioned to the right of the error icon, containing the text "Please fill out this field.".</p>

# Review & Approve Evidence Item

Step	Instructions
12	<ul style="list-style-type: none"><li>After entering a comment, click the <b>Green Approve</b> button.</li></ul>  <p>The screenshot shows a review interface with a comment box containing the text: "This evidence item clearly demonstrates a key component of the university's governance practices. The item is approved." Below the comment box are three buttons: "Approve" (green), "Send Back" (yellow), and "Reject" (red). A red arrow points to the "Approve" button.</p>

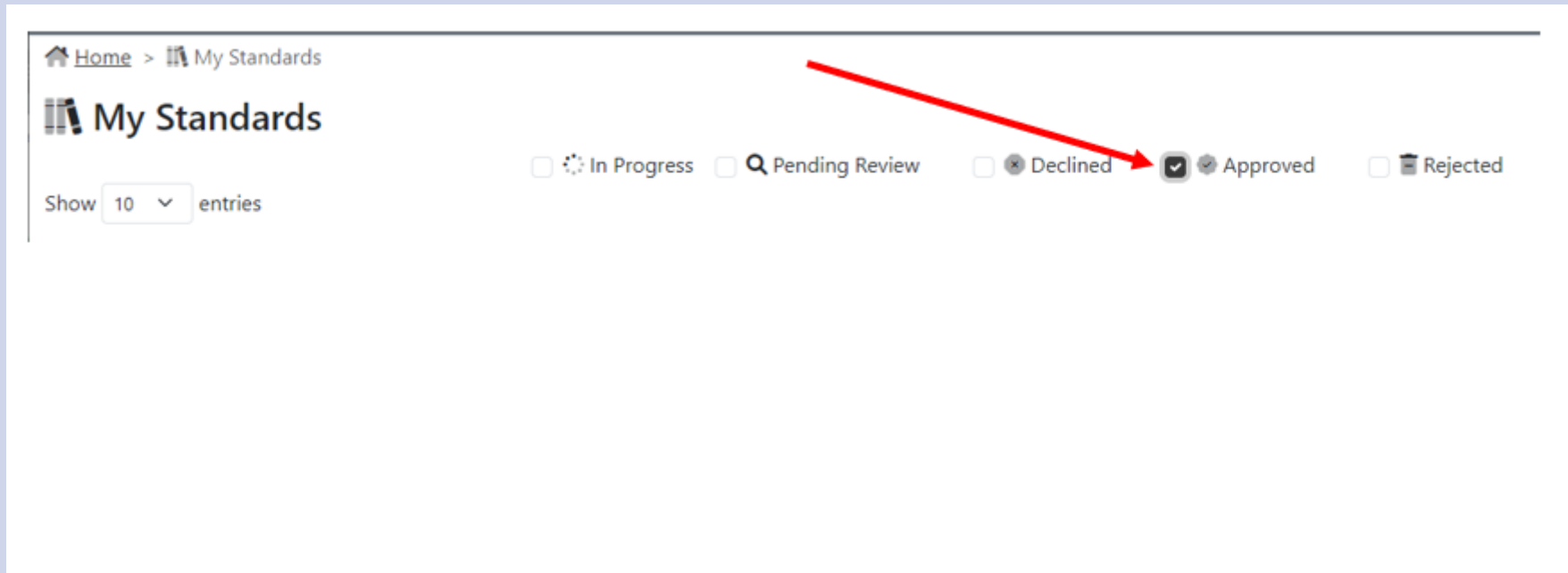
# Review & Approve Evidence Item

## Step

## Instructions

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

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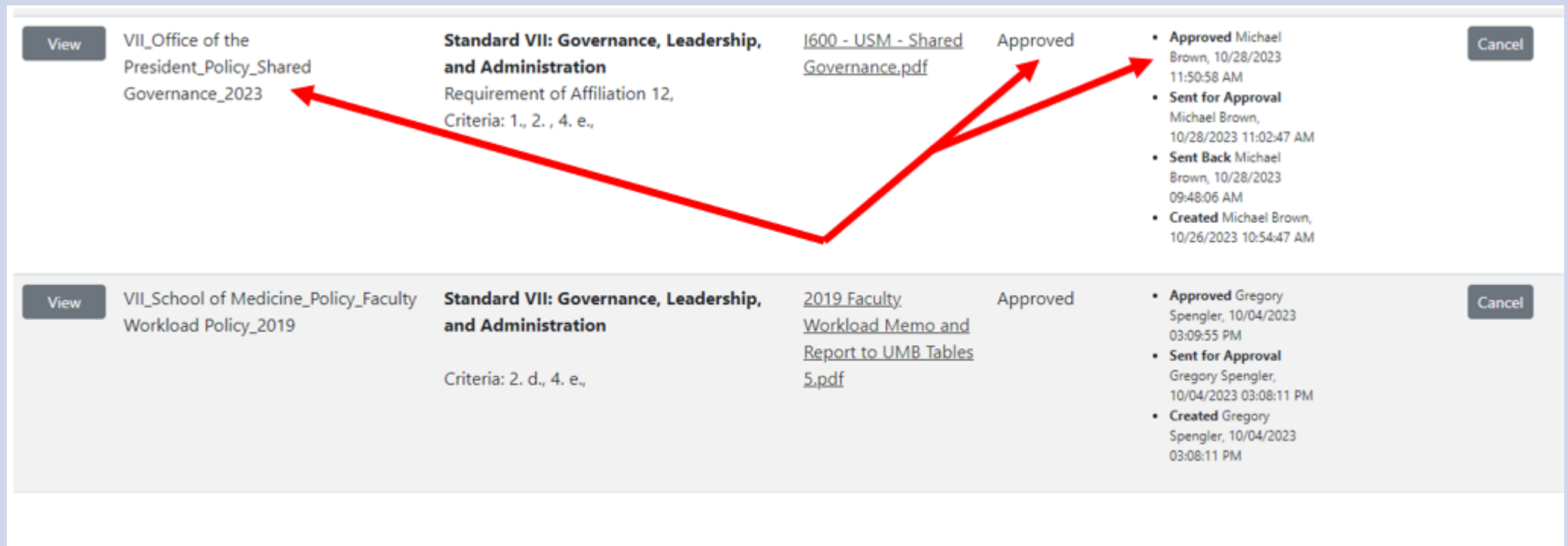
# Review & Approve Evidence Item

## Step

## Instructions

- **Verify** the item is listed as approved.
- The **manager's name** for who approved the item, **date and time** of the approval are displayed.

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<a href="#">View</a>	VII_Office of the President_Policy_Shared Governance_2023	<b>Standard VII: Governance, Leadership, and Administration</b> Requirement of Affiliation 12, Criteria: 1., 2. , 4. e.,	<a href="#">1600 - USM - Shared Governance.pdf</a>	Approved	<ul style="list-style-type: none"><li>• <b>Approved</b> Michael Brown, 10/28/2023 11:50:58 AM</li><li>• <b>Sent for Approval</b> Michael Brown, 10/28/2023 11:02:47 AM</li><li>• <b>Sent Back</b> Michael Brown, 10/28/2023 09:48:06 AM</li><li>• <b>Created</b> Michael Brown, 10/26/2023 10:54:47 AM</li></ul>	<a href="#">Cancel</a>
<a href="#">View</a>	VII_School of Medicine_Policy_Faculty Workload Policy_2019	<b>Standard VII: Governance, Leadership, and Administration</b>  Criteria: 2. d., 4. e.,	<a href="#">2019_Faculty Workload Memo and Report to UMB Tables 5.pdf</a>	Approved	<ul style="list-style-type: none"><li>• <b>Approved</b> Gregory Spengler, 10/04/2023 03:09:55 PM</li><li>• <b>Sent for Approval</b> Gregory Spengler, 10/04/2023 03:08:11 PM</li><li>• <b>Created</b> Gregory Spengler, 10/04/2023 03:08:11 PM</li></ul>	<a href="#">Cancel</a>

# Review & Approve Evidence Item

Step	Instructions
15	<ul style="list-style-type: none"><li data-bbox="428 362 2384 454">• An <b>email notification</b> will be sent to the standard's assigned managers and all assigned contributors indicating that the item has been approved.</li></ul> <div data-bbox="453 511 2397 1193" style="border: 1px solid #ccc; padding: 10px;"><h2 data-bbox="473 558 2040 629">Document Approved – Shared Governance</h2><p data-bbox="473 682 800 722">Dear Michael Brown,</p><p data-bbox="473 768 1345 808">Evidence Item Shared Governance has been Approved.</p><p data-bbox="473 851 1065 891"><b>Document Title:</b> <a href="#">Shared Governance</a></p><p data-bbox="473 933 667 973"><b>Comments:</b></p><p data-bbox="473 976 2354 1016">This evidence item clearly demonstrates a key component of the university's governance practices. The item is approved</p><p data-bbox="473 1062 687 1139">Best regards, EIMS System</p></div>

# Review & Approve Evidence Item

Step	Instructions
16	<ul style="list-style-type: none"><li>The <b>Document Title</b> within the email notification is a clickable link to directly access the item.<ul style="list-style-type: none"><li>The <b>View Item</b> screen will appear after clicking the link.</li></ul></li></ul> <div data-bbox="524 565 2313 1193"><p><b>Document Approved – Shared Governance</b></p><p>Dear Michael Brown,</p><p>Evidence Item Shared Governance has been Approved.</p><p><b>Document Title:</b> <a href="#">Shared Governance</a></p><p><b>Comments:</b> This evidence item clearly demonstrates a key component of the university's governance practices. The item is approved</p><p>Best regards, EIMS System</p></div>

# Review & Approve Evidence Item

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