Evidence Inventory Management System (EIMS)

User Guide

Add Evidence Item & Send for Approval

Overview

This document provides step-by-step instructions to accomplish the following 2 tasks

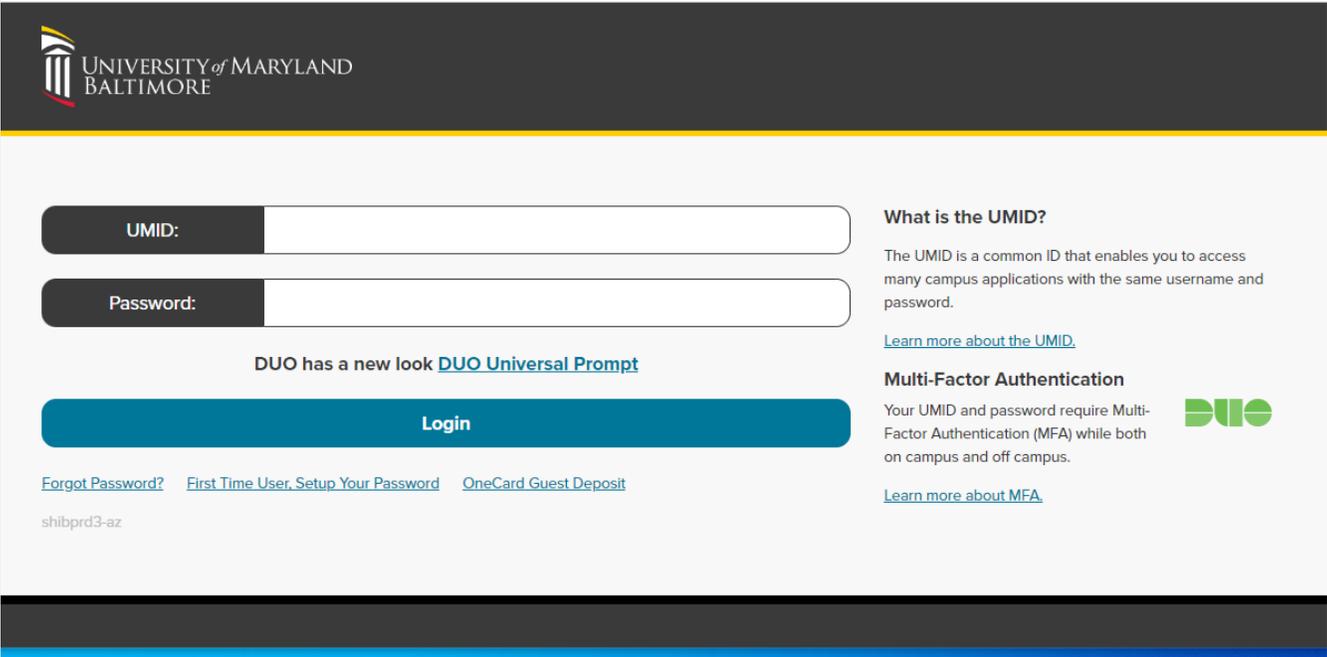1. Add an Evidence Item
2. Send Evidence Item for Approval

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	• Open a browser and go to https://cfapps.umaryland.edu/eims/admin/myevidence/index.cfm
2	• Complete the UMID Multi-Factor Authentication by using your UMID and Password.

My Evidence Landing Page

Step	Instructions
3	• The <mark>My Evidence</mark> screen should appear.

Add Evidence Item

Step	Instructions
4	• Click the <mark>Add</mark> button located in the upper right portion of the screen.

Add Evidence Item

Step	Instructions
5	• The Add Evidence screen should appear.
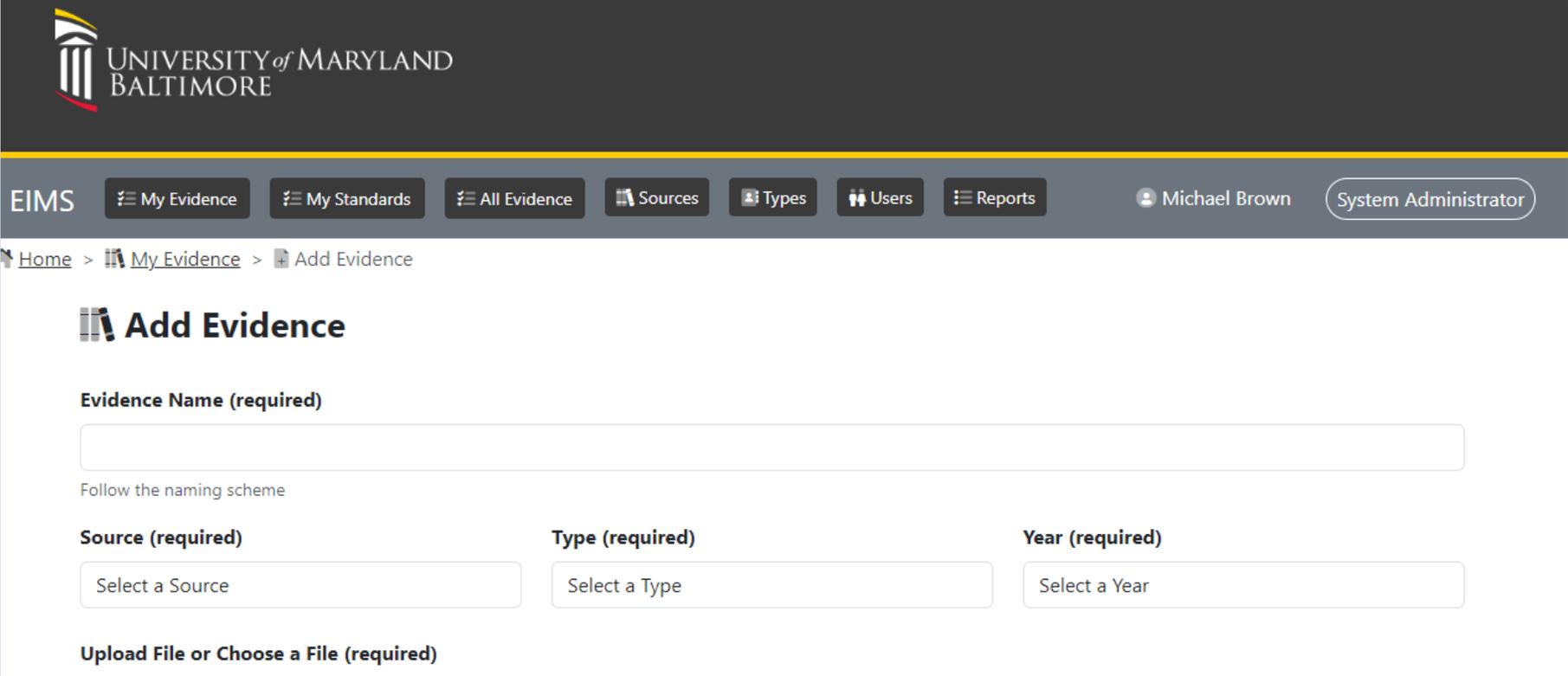
Add Evidence Item

Step	Instructions
6	• For Evidence Name, enter a short descriptive name. Ex: Shared Governance. • The Evidence Name should not include the following items: • Name of School, Organization, or Administrative Unit • Type of document (e.g.; "Policy", "Plan", "Report", "Org Chart", "Presentation", "Mission Statement", etc.) • These items, listed above, will be identified by separate selections in subsequent steps. **Add Evidence** **Evidence Name (required)** Shared Governance Follow the naming scheme

Add Evidence Item

Step	Instructions
7	• For Source, <mark>select the School, Organization, or Administrative Unit</mark> <u>most associated</u> with the supporting document that will be selected or uploaded. 　• If you <mark>do not see an appropriate source</mark>, please contact UMB's EIMS support team to have the source added to the list. • Ex. Office of the Provost:

Add Evidence Item

Step	Instructions
8	• For Type, select an option that best describes the supporting document to be selected or uploaded. • If you do not see an appropriate type, please contact UMB's EIMS support team to have the source added to the list. • Ex. Policy: **Type (required)** Select a Type **Type (required)** Policy **Type (required)** Select a Type Select a Type Mission Statement Organizational Chart Plan Policy Presentation Report

Add Evidence Item

Step	Instructions
9	- For Year, <mark>select the calendar year or fiscal year</mark> <u>most associated</u> with supporting document that will be selected or uploaded. - If the <u>year is not known</u>, select "<mark>None</mark>". - If you <mark>do not see an appropriate year</mark>, please contact UMB's EIMS support team to have the source added to the list. - Ex. 2023:

Year (required)

Select a Year

Year (required)

2023

Year (required)

FY23

Select a Year
None
2025
2024
2023
2022
2021
2020
2019

Fiscal Years at Bottom

1992
1991
1990
FY25
FY24
FY23
FY22
FY21
FY20
FY19

Add Evidence Item

Step	Instructions
10	• The next step is to add the document/file. • First, conduct a search to determine if the document/file has already been uploaded/added to the evidence inventory. • To search for the file, type a word or phrase in the Filter files... text box that is most likely to appear in the name of the file. • Ex. Mission: List of files without Filter Filtered list of filenames containing Mission

Filter files... → Mission

List of files without Filter

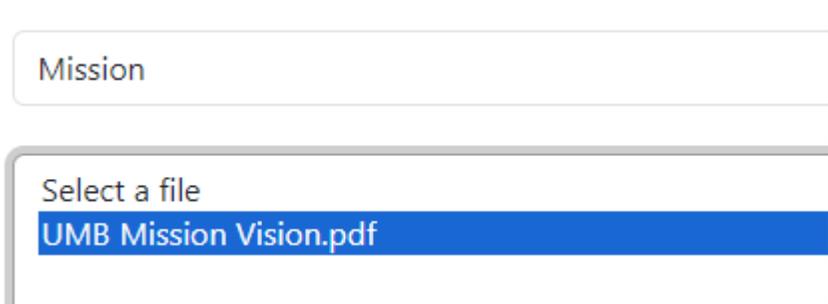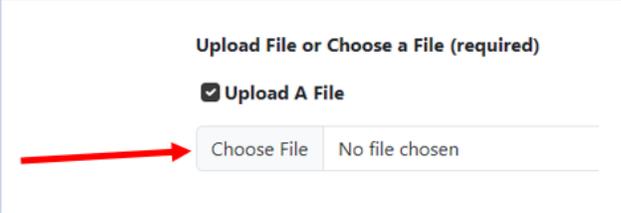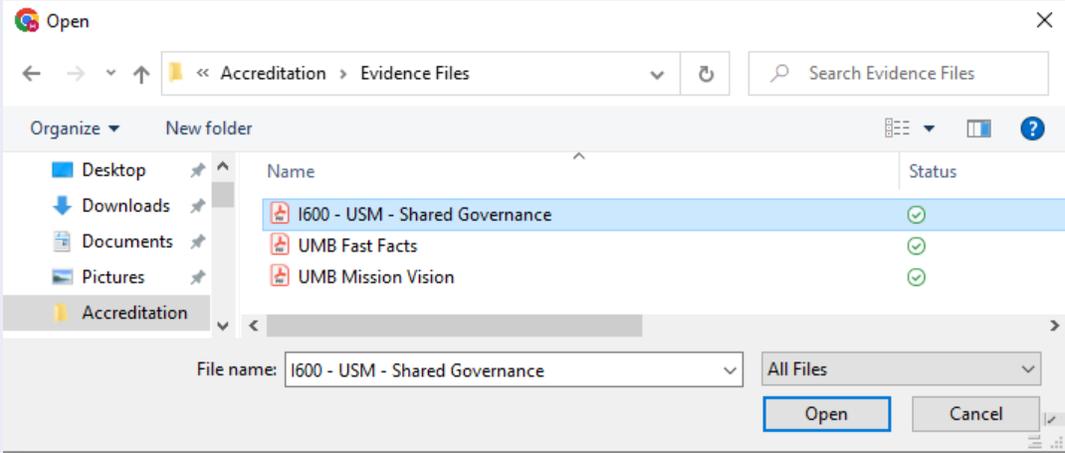| Filter files... |
| --- |
| Select a file |
| 2019 Faculty Workload Memo and Report to UMB Tables 5.pdf |
| test_aaa.docx |
| test_document2.docx |
| Title IV Refund Policy.docx |
| UMB Fast Facts FY22.pdf |
| UMB Mission Vision.pdf |
| UMB State of the University Address 2022.pdf |
| UMD-SelfStudy-Dec2016_0.pdf |

Filtered list of filenames containing Mission

Mission
Select a file
UMB Mission Vision.pdf

Add Evidence Item

Step	Instructions
11	• If the file appears in the list of files, select the file, otherwise go to the next step (#12) to upload your file. Mission Select a file **UMB Mission Vision.pdf**
12	• If the file does not appear in the list of files, upload your file by clicking the Checkbox next to Upload A File. Upload File or Choose a File (required) ☐ Upload A File Upload File or Choose a File (required) ☑ Upload A File

Add Evidence Item

Step	Instructions
13	• Click the <mark>Choose File button</mark>. Upload File or Choose a File (required) ☑ Upload A File Choose File No file chosen
14	• The <mark>Open</mark> dialog window will appear. <mark>Locate and select</mark> the file to upload. Click the <mark>Open button</mark> after selecting the file. Ex: I600 – USM – Shared Governance

Add Evidence Item

Step	Instructions
15	• The selected file should appear to the right of the Choose file button. • Note, if you try to upload a file with the same name of an existing file in the inventory, the following message will appear:

Add Evidence Item

Step	Instructions
16	• For <mark>Description of Evidence</mark>, provide a descriptive narrative to demonstrate how the selected document/file supports the Standard and satisfies one of more of the standard's associated items (e.g., Requirements of Affiliations, Criteria). **Description of Evidence (required)** Please describe the evidence and how it supports the standard. 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. 1303 characters remaining
17	• If desired, for the optional <mark>Contributor's Comments</mark>, provide a comment that would be most helpful to the workgroup or facilitate the approval of the item. It's is highly recommended to always add a comment. **Contributor's Comments (optional)** if desired, please provide comments to workgroup members or the manager. Hi colleagues, please let me know if additional text is needed to support this evidence item. 1907 characters remaining RECOMMENDED

Add Evidence Item

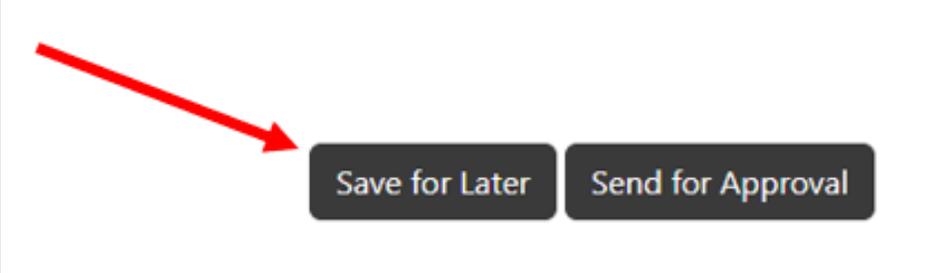| Step	Instructions
18	• Select <mark>at least one option</mark> from the Standard's list of Requirement of Affiliations and Criteria. **Select at least one option from the list below (required)** **Standard VII: Governance, Leadership, and Administration** `Show` ☑ **Requirement of Affiliation 12** 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. ☐ **Requirement of Affiliation 13** A majority of the institution's governing body's members have no employment, family, ownership, or other personal financial interest in the institution. The governing body adheres to a conflict of interest policy that assures that those interests are disclosed and that they do not interfere with the impartiality of governing body members or outweigh the greater duty to secure and ensure the academic and fiscal integrity of the institution. The institution's district/system or other chief executive officer shall not serve as the chair of the governing body. ☑ **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: ☐ **2. a.** serves the public interest, ensures that the institution clearly states and fulfills its mission and goals, has fiduciary responsibility for the institution, and is ultimately accountable for the academic quality, planning, and fiscal well-being of the institution; ☐ **2. b.** has sufficient independence and expertise to ensure the integrity of the institution. Members must have primary responsibility to the accredited institution and not allow political, financial, or other influences to interfere with their governing responsibilities;

Add Evidence Item

Step	Instructions
19	• For tutorial and learning purposes, choose the Save for Later button to gain experience with this option and coming back later to edit the evidence item prior to sending for approval. Note: If the item is ready for Review & Approval by the Standard's managers, you can click the Send for Approval button.

Add Evidence Item

Step	Instructions
20	• If you chose the <mark>Save for Later</mark> option, locate the saved item in the My Evidence screen.

Add Evidence Item

Step	Instructions
20.1	• Notice how the <mark>fully qualified Evidence name</mark> appears using the selected components: • <mark>Standard Number</mark> (roman numeral) • <mark>Source</mark> • Type • Evidence Name (short name) • <mark>Year</mark> • Ex: VII_Office of the President_Policy_Shared Governance_2023

EIMS – Evidence Name - Examples

- I _Office Of The President_Mission Statement_UMB Mission Vision

- II_Office of the Provost_Policy_Code of Ethics And Conduct_2023

- VII_Office Of The President_OrgChart_University Leadership Organization Chart_2023

- IV_Division of Student Affairs_Report_Campus Life Annual Report _2023

- VI_Administration and Finance_Plan_Annual Budget_FY23

Add Evidence Item

Step	Instructions
21	• To edit the item and subsequentially send for approval, click the Edit button next to the item.

Add Evidence Item

Step	Instructions
22	• The Edit Evidence screen will appear. The Evidence Item's status should show as In Progress. • The most recent comment, if one exists, will appear next to the "In Progress" status.

Add Evidence Item

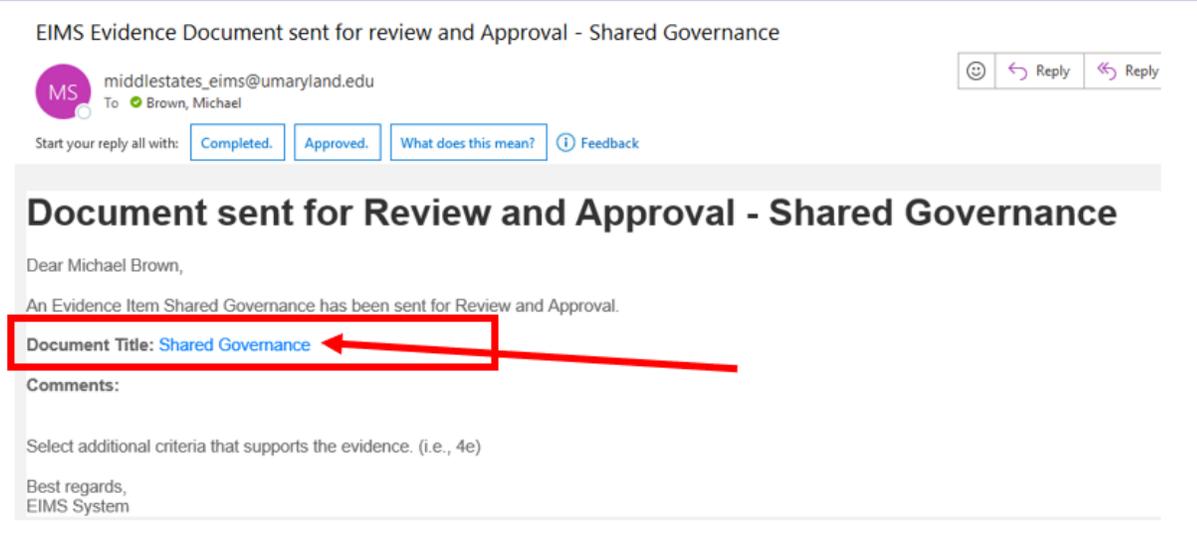| Step	Instructions
23	• All components of the Evidence Item can be modified, including the ability to change the supporting document/file.
24	• If you have made additional changes, it is <mark>highly recommended to add a comment</mark> describing the changes that have been made. **Contributor's Comments (Optional)** *if desired, please provide comments to workgroup members or the manager.* Select additional criteria that supports the evidence. (i.e., 4e) 1935 characters remaining **Previous Comments** Hi Colleagues, please let me know if additional descriptive text is needed to support the standard. RECOMMENDED

Add Evidence Item

Step	Instructions
25	• Click the <mark>Send for Approval</mark> button to submit the item to the managers assigned to the standard.
25	• An <mark>email notification</mark> will be sent to the standard's assigned managers and all assigned contributors indicating that the item has been sent for review and approval.
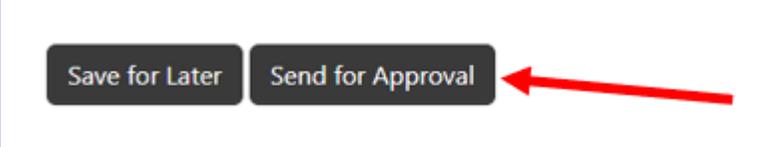
Add Evidence Item

Step	Instructions
26	• The Document Title within the email notification is a clickable link to directly access the item. • For contributors, the View Item screen will appear after clicking the link. • For managers, the Review Item screen will appear after clicking the link to approve, send back, or reject the item.

Add Evidence Item

Step	Instructions
27	End of Tutorial