



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

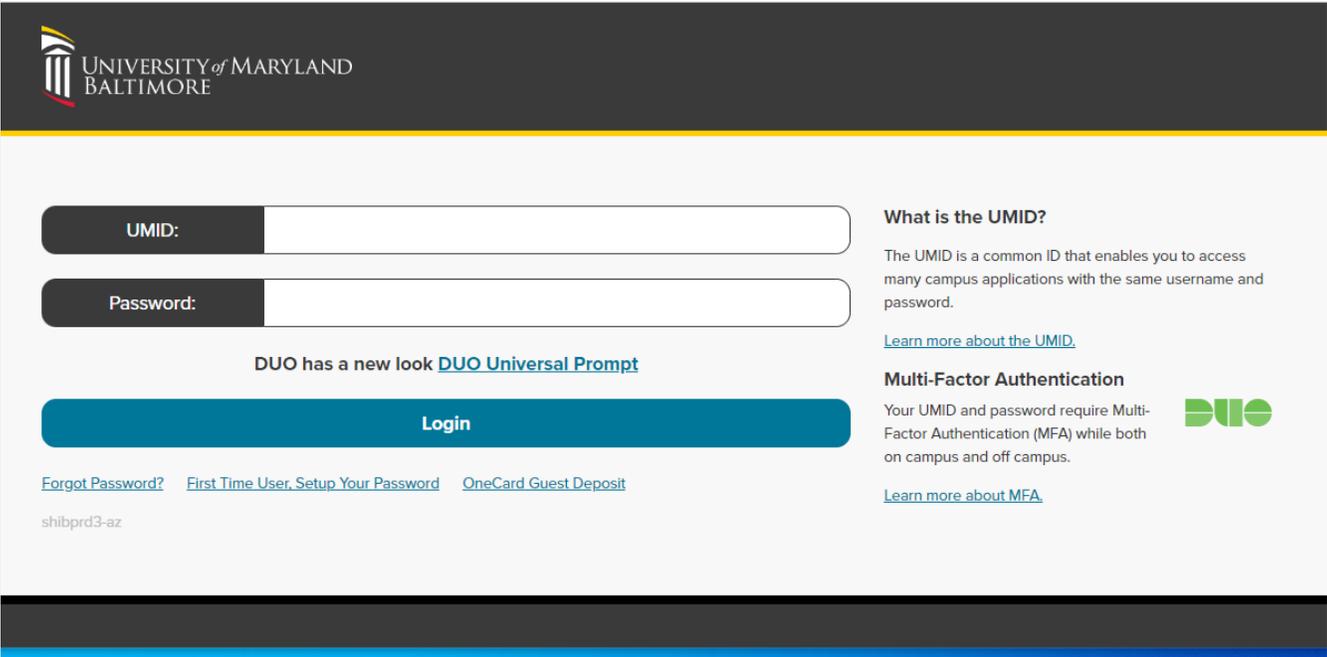
To proceed you must have authorized access to EIMS.

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

My Evidence Landing Page

Step

Instructions

- The **My Evidence** screen should appear.

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The screenshot shows the 'My Evidence' page in the EIMS system. At the top, there is a header with the University of Maryland Baltimore logo and the text 'UNIVERSITY of MARYLAND BALTIMORE'. Below the header is a navigation bar with buttons for 'My Evidence', 'My Standards', 'All Evidence', 'Sources', 'Types', 'Users', and 'Reports'. The user's name 'Michael Brown' and role 'System Administrator' are displayed on the right. The main content area has a breadcrumb trail 'Home > My Evidence' and a title 'My Evidence'. There are 'Add' and 'Cancelled' buttons. Below the title, there are filters for 'In Progress', 'Pending Review', 'Declined', 'Approved', and 'Rejected'. A 'Show 10 entries' dropdown and a search box are also present. A table with columns 'Actions', 'Evidence', 'Standard/Requirement of Affiliation/Criteria', 'Original File Name', 'Status', 'User Activity', 'Manage', and 'Cancel' is shown, but it contains no data. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.

UNIVERSITY of MARYLAND BALTIMORE

EIMS My Evidence My Standards All Evidence Sources Types Users Reports Michael Brown System Administrator

Home > My Evidence

My Evidence 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
No data available in table							

Showing 0 to 0 of 0 entries Previous Next

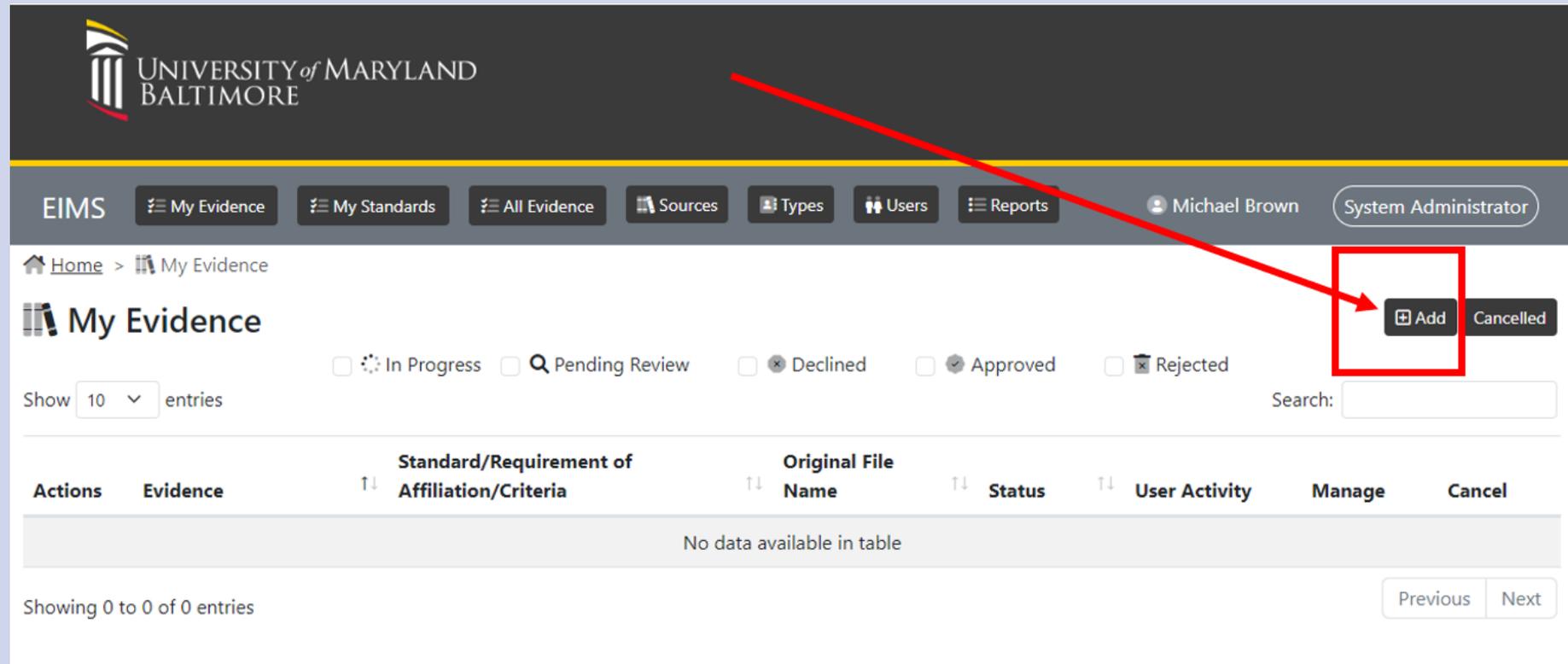
Add Evidence Item

Step

Instructions

- Click the **Add** button located in the upper right portion of the screen.

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UNIVERSITY of MARYLAND
BALTIMORE

EIMS My Evidence My Standards All Evidence Sources Types Users Reports Michael Brown System Administrator

[Home](#) > [My Evidence](#)

My Evidence

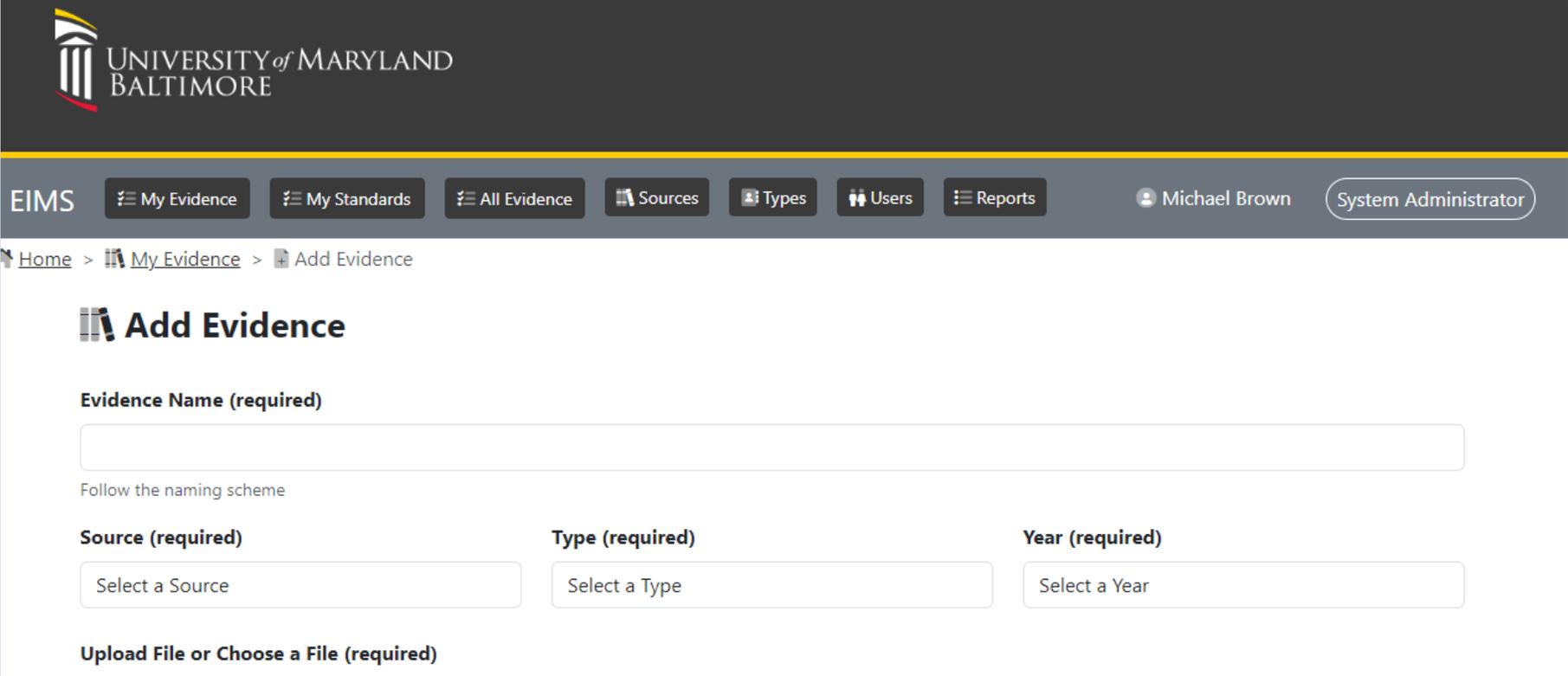
In Progress Pending Review Declined Approved Rejected

Show entries Search:

Actions	Evidence	Standard/Requirement of Affiliation/Criteria	Original File Name	Status	User Activity	Manage	Cancel
No data available in table							

Showing 0 to 0 of 0 entries Previous Next

Add Evidence Item

Step	Instructions
5	<ul style="list-style-type: none">The Add Evidence screen should appear.  <p>The screenshot displays the 'Add Evidence' interface. At the top, the University of Maryland Baltimore logo is visible. Below the logo is a navigation bar with buttons for 'My Evidence', 'My Standards', 'All Evidence', 'Sources', 'Types', 'Users', and 'Reports'. The user's name 'Michael Brown' and role 'System Administrator' are shown on the right. The breadcrumb trail indicates the path: Home > My Evidence > Add Evidence. The main heading is 'Add Evidence'. The form includes a text input field for 'Evidence Name (required)' with a note 'Follow the naming scheme'. Below this are three dropdown menus for 'Source (required)', 'Type (required)', and 'Year (required)'. At the bottom, there is a section for 'Upload File or Choose a File (required)'.</p>

Add Evidence Item

Step	Instructions
6	<ul style="list-style-type: none">• For Evidence Name, enter a short descriptive name. Ex: Shared Governance.• The Evidence Name <u>should not include</u> the following items:<ul style="list-style-type: none">• Name of School, Organization, or Administrative Unit• Type of document (e.g.; “Policy”, “Plan”, “Report”, “Org Chart”, “Presentation”, “Mission Statement”, etc.)• These items, <u>listed above</u>, will be identified by separate selections in subsequent steps. <div data-bbox="499 868 1337 1229"><p>Add Evidence</p><p>Evidence Name (required)</p><p>Shared Governance</p><p>Follow the naming scheme</p></div>

Add Evidence Item

Step	Instructions
7	<ul style="list-style-type: none">For Source, select the School, Organization, or Administrative Unit <u>most associated</u> with the supporting document that will be selected or uploaded.<ul style="list-style-type: none">If you do not see an appropriate source, please contact UMB's EIMS support team to have the source added to the list.Ex. Office of the Provost: <div data-bbox="479 745 1243 949"><p>Source (required)</p><input type="text" value="Select a Source"/></div> <div data-bbox="479 1031 1243 1228"><p>Source (required)</p><input type="text" value="Office of the Provost"/></div> <div data-bbox="1391 611 2127 1228"><p>Source (required)</p><input type="text" value="Select a Source"/><ul style="list-style-type: none">Select a SourceCarey School of LawCenter for Information Technology ServicesGraduate SchoolOffice of the PresidentOffice of the ProvostProvost - Institutional EffectivenessSchool of MedicineSchool of NursingSchool of Social WorkStudent Financial Assistance</div>

Add Evidence Item

Step	Instructions
8	<ul style="list-style-type: none">For Type, select an option that best describes the supporting document to be selected or uploaded.<ul style="list-style-type: none">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: <div data-bbox="486 772 1225 951"><p>Type (required)</p><input type="text" value="Select a Type"/></div> <div data-bbox="486 1008 1243 1200"><p>Type (required)</p><input type="text" value="Policy"/></div> <div data-bbox="1352 772 2091 1239"><p>Type (required)</p><input type="text" value="Select a Type"/><ul style="list-style-type: none">Select a TypeMission StatementOrganizational ChartPlanPolicyPresentationReport</div>

Add Evidence Item

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

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Year (required)

Year (required)

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

- 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**:

Filter files...

Mission

List of files without Filter

Filtered list of filenames containing **Mission**

Filter files...

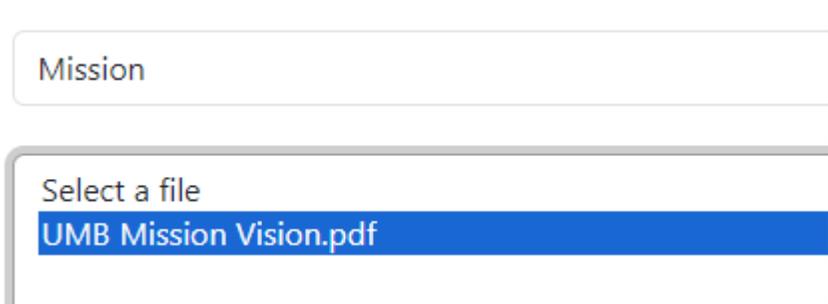
Select a file
2019 Faculty Workload Memo and Report to UMB Tables 5.pdf
test_aaa.docx
test_document2.docx
Title IV Refund Policy.docx
UMB Fast Facts FY22.pdf
UMB Mission Vision.pdf
UMB State of the University Address 2022.pdf
UMD-SelfStudy-Dec2016_0.pdf

Mission

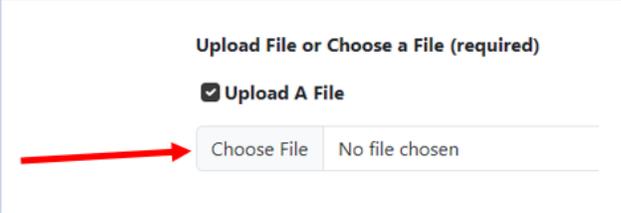
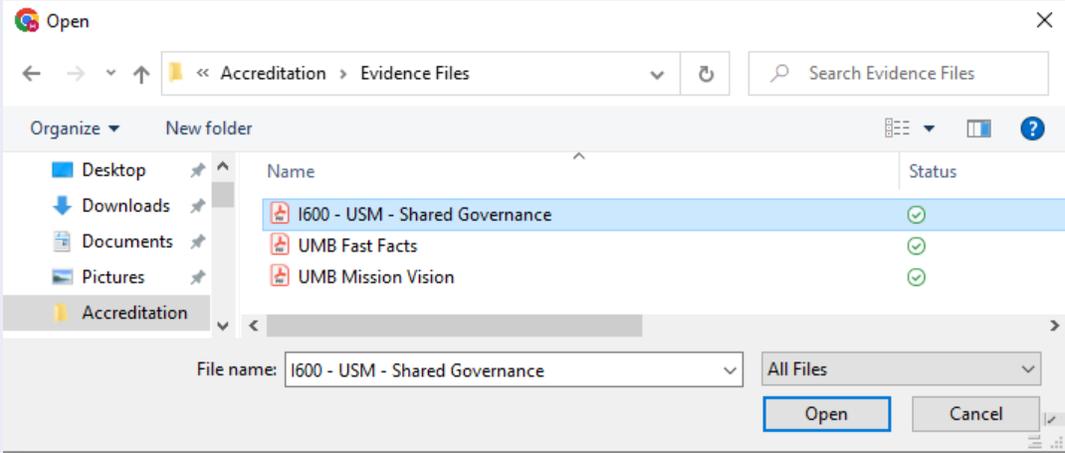
Select a file
UMB Mission Vision.pdf

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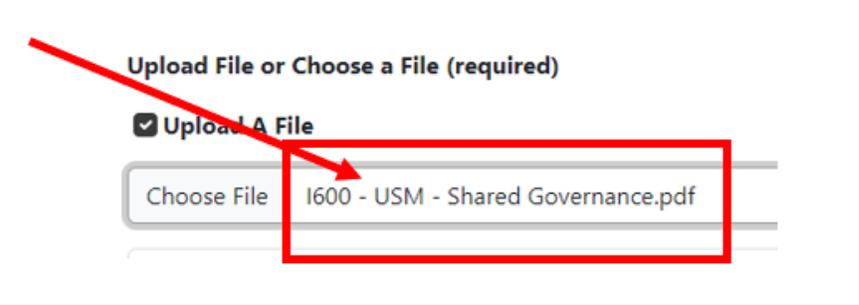
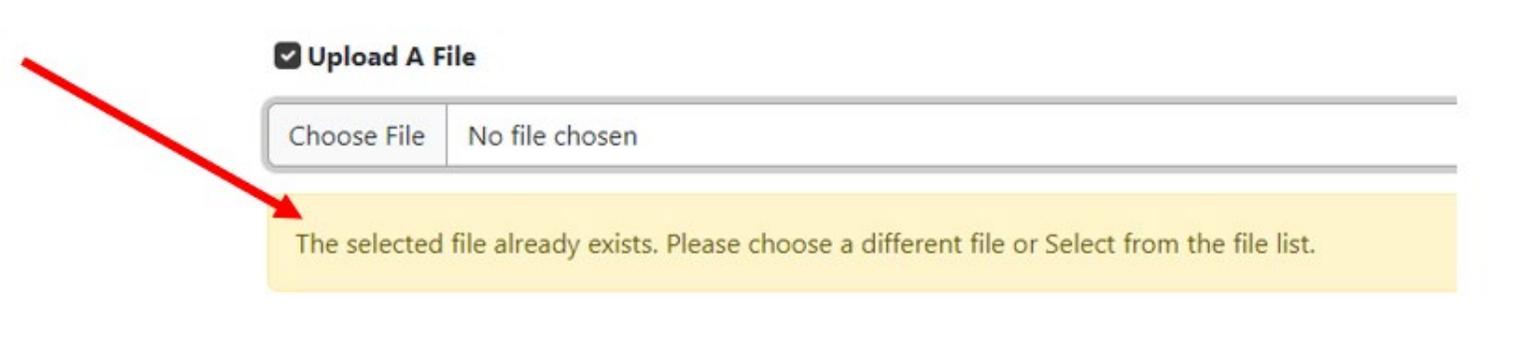
Add Evidence Item

Step	Instructions
11	<ul style="list-style-type: none"><li data-bbox="428 362 2308 405">If the file appears in the list of files, select the file, otherwise go to the next step (#12) to upload your file. 
12	<ul style="list-style-type: none"><li data-bbox="428 836 2339 879">If the file does not appear in the list of files, upload your file by clicking the Checkbox next to Upload A File. 

Add Evidence Item

Step	Instructions
13	<ul style="list-style-type: none">Click the Choose File button. 
14	<ul style="list-style-type: none">The Open dialog window will appear. Locate and select the file to upload. Click the Open button after selecting the file. <p>Ex: I600 – USM – Shared Governance</p> 

Add Evidence Item

Step	Instructions
15	<ul style="list-style-type: none"><li data-bbox="428 362 1689 401">• The selected file should appear to the right of the Choose file button.  <p data-bbox="657 434 1516 739">A screenshot of the file upload interface. At the top, it says "Upload File or Choose a File (required)". Below that is a checked checkbox labeled "Upload A File". Underneath is a "Choose File" button and a text input field containing the filename "I600 - USM - Shared Governance.pdf". A red box highlights the filename, and a red arrow points from the top left towards the filename.</p> <ul style="list-style-type: none"><li data-bbox="428 768 2372 858">• Note, if you try to upload a file with the same name of an existing file in the inventory, the following message will appear:  <p data-bbox="690 891 2204 1229">A screenshot of the file upload interface showing an error message. At the top, it says "Upload A File" with a checked checkbox. Below that is a "Choose File" button and a text input field containing "No file chosen". A red arrow points from the top left towards the error message. Below the input field is a yellow error message box that reads: "The selected file already exists. Please choose a different file or Select from the file list."</p>

Add Evidence Item

Step	Instructions
16	<ul style="list-style-type: none">For Description of Evidence, 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). <div data-bbox="435 486 2160 808"><p>Description of Evidence (required) <i>Please describe the evidence and how it supports the standard.</i></p><p>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.</p><p>1303 characters remaining</p></div>
17	<ul style="list-style-type: none">If desired, for the optional Contributor's Comments, provide a comment that would be most helpful to the workgroup or facilitate the approval of the item. It's highly recommended to always add a comment. <div data-bbox="435 1048 1319 1358"><p>Contributor's Comments (optional) <i>if desired, please provide comments to workgroup members or the manager.</i></p><p>Hi colleagues, please let me know if additional text is needed to support this evidence item.</p><p>1907 characters remaining</p></div> 

Add Evidence Item

Step

Instructions

- Select **at least one option** from the Standard's list of Requirement of Affiliations and Criteria.

Select at least one option from the list below (required)

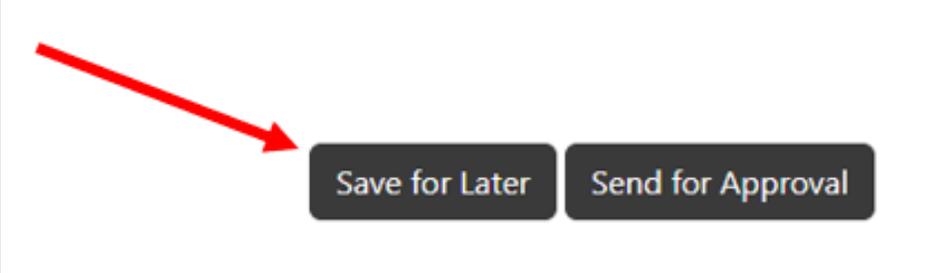
Standard VII: Governance, Leadership, and Administration

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;

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Add Evidence Item

Step	Instructions
19	<ul style="list-style-type: none">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. <p>Note: If the item is ready for Review & Approval by the Standard's managers, you can click the Send for Approval button.</p>  <p>The image shows a white rectangular area containing two dark grey buttons with white text. The left button is labeled 'Save for Later' and the right button is labeled 'Send for Approval'. A red arrow points from the top-left towards the 'Save for Later' button.</p>

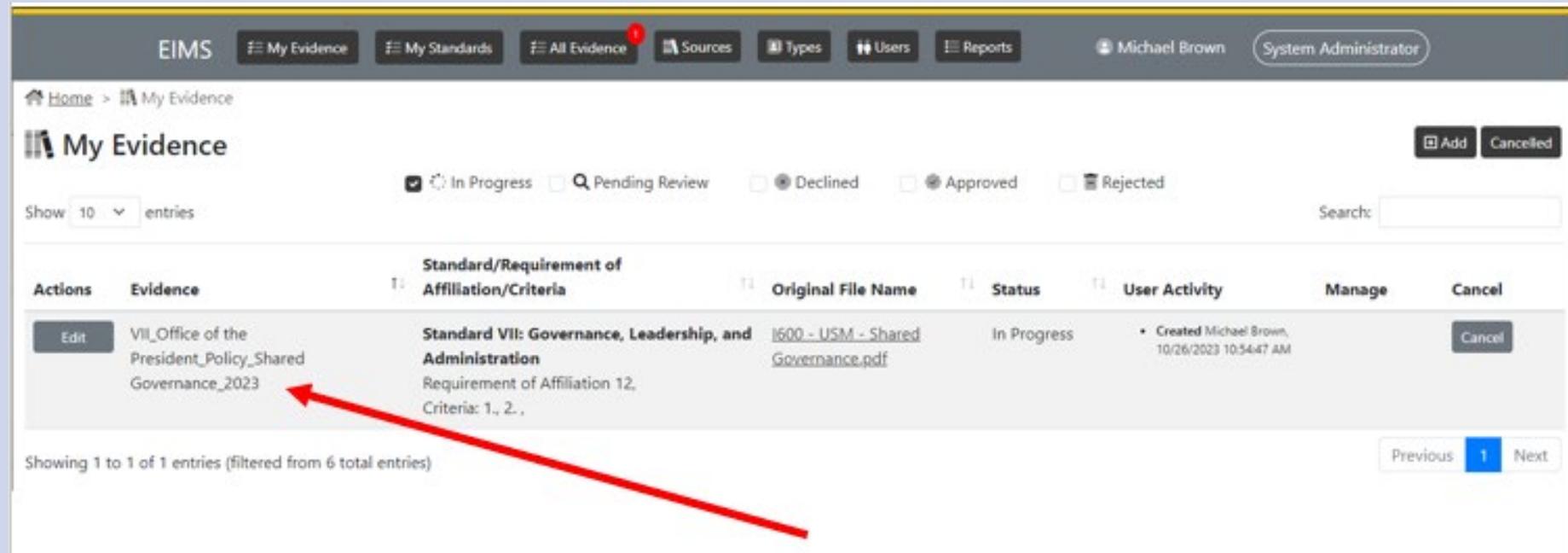
Add Evidence Item

Step

Instructions

- If you chose the **Save for Later** option, **locate the saved item** in the My Evidence screen.

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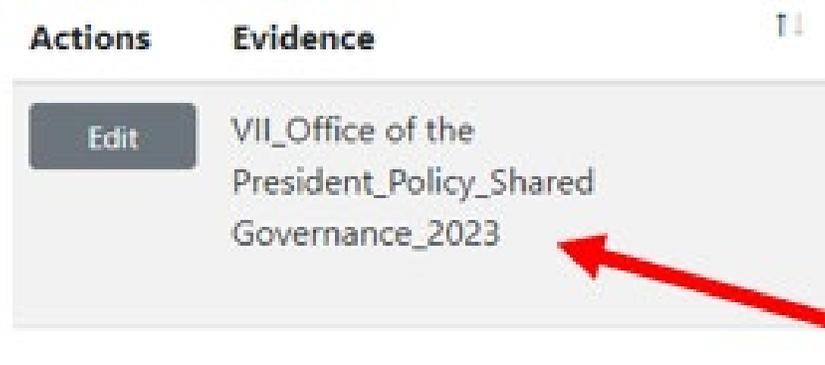


The screenshot displays the EIMS 'My Evidence' interface. At the top, there are navigation tabs for 'My Evidence', 'My Standards', 'All Evidence', 'Sources', 'Types', 'Users', and 'Reports'. The user is identified as Michael Brown, System Administrator. Below the navigation, there are filters for 'In Progress', 'Pending Review', 'Declined', 'Approved', and 'Rejected'. A search bar is present on the right. The main content is a table with the following columns: Actions, Evidence, Standard/Requirement of Affiliation/Criteria, Original File Name, Status, User Activity, Manage, and Cancel. The table contains one entry with the following details:

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.,	1600 - USM - Shared Governance.pdf	In Progress	Created Michael Brown, 10/26/2023 10:54:47 AM		Cancel

Showing 1 to 1 of 1 entries (filtered from 6 total entries)

Add Evidence Item

Step	Instructions
20.1	<ul style="list-style-type: none">Notice how the fully qualified Evidence name appears using the selected components:<ul style="list-style-type: none">Standard Number (roman numeral)SourceTypeEvidence Name (short name)YearEx: VII_Office of the President_Policy_Shared Governance_2023  <p>The screenshot shows a table with two columns: 'Actions' and 'Evidence'. In the 'Actions' column, there is a button labeled 'Edit'. In the 'Evidence' column, the text 'VII_Office of the President_Policy_Shared Governance_2023' is displayed. A red arrow points from the bottom right towards the end of this text.</p>

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

- To **edit the item** and subsequently send for approval, click the **Edit** button next to the item.

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The screenshot shows the EIMS 'My Evidence' interface. At the top, there are navigation tabs for 'My Evidence', 'My Standards', 'All Evidence', 'Sources', 'Types', 'Users', and 'Reports'. The user is identified as Michael Brown, System Administrator. Below the navigation, there are filters for 'In Progress', 'Pending Review', 'Declined', 'Approved', and 'Rejected'. A search bar is also present. The main content is a table with the following columns: Actions, Evidence, Standard/Requirement of Affiliation/Criteria, Original File Name, Status, User Activity, Manage, and Cancel. The table contains one entry with the following details:

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.,	1600 - USM - Shared Governance.pdf	In Progress	Created Michael Brown, 10/26/2023 10:54:47 AM		Cancel

Showing 1 to 1 of 1 entries (filtered from 6 total entries)

A red arrow points from the bottom right towards the 'Edit' button in the table row.

Add Evidence Item

Step

Instructions

- 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.

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EIMS My Evidence My Standards All Evidence Sources Types Users Reports Michael Brown

Home > My Standards > Edit Evidence

Edit Evidence

In Progress: Hi Colleagues, please let me know if additional descriptive text is needed to support the standard.

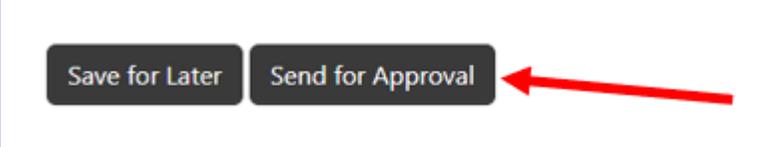
Evidence Name (required)
Shared Governance
Follow the naming scheme

Source (required) Office of the President **Type (required)** Policy **Year (required)** FY23

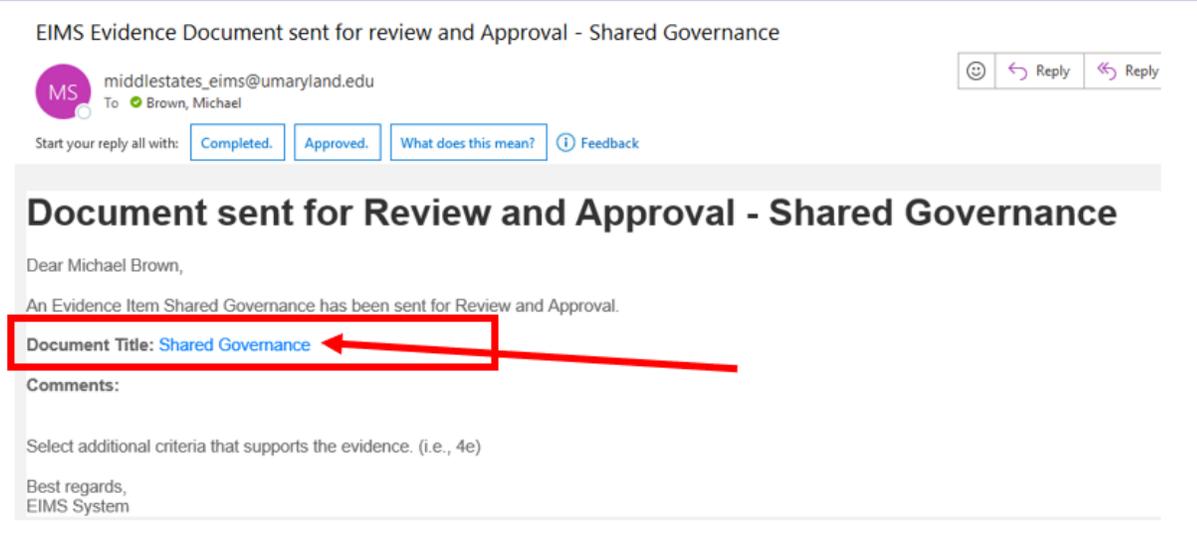
Add Evidence Item

Step	Instructions
23	<ul style="list-style-type: none">All components of the Evidence Item can be modified, including the ability to change the supporting document/file.
24	<ul style="list-style-type: none">If you have made additional changes, it is highly recommended to add a comment describing the changes that have been made. <div data-bbox="486 694 1862 1253"><p>Contributor's Comments (Optional) <i>if desired, please provide comments to workgroup members or the manager.</i></p><p>Select additional criteria that supports the evidence. (i.e., 4e)</p><p>1935 characters remaining</p><p>Previous Comments</p><p>Hi Colleagues, please let me know if additional descriptive text is needed to support the standard.</p></div> 

Add Evidence Item

Step	Instructions
25	<ul style="list-style-type: none">Click the Send for Approval button to submit the item to the managers assigned to the standard. 
25	<ul style="list-style-type: none">An email notification 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	<ul style="list-style-type: none">The Document Title within the email notification is a clickable link to directly access the item.<ul style="list-style-type: none">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	<p data-bbox="1141 476 1702 551">End of Tutorial</p> 