## **CIM User Management Guide for Programs and Courses**

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### Overview

CIM Program Management is CMTN's electronic program/course proposal and review software. All existing academic programs and courses are housed in this platform and must be edited using this software. Once submitted, program and course proposals are routed through our system to the appropriate chain of process for approval.

#### URL's for easy access

Faculty and staff will use their CMTN (computer login) username and password to login to the system.

- 1. Use AD credentials to login
- 2. Usernames are case-sensitive. Always use **lower-case** (Courseleaf had clarified this during the rollout, eg- use **atrivedi** only, ATrivedi or aTrivedi does not work)
- 3. IT can reset passwords if credentials do not work
- 4. Contact Courseleaf admin (the Records team in the Registrar's office) to ensure that staff are users in the system.

CIM Program Management is located at: (Please copy and paste these links in your browser)

nextcatalogue.coastmountaincollege.ca/programadmin/

#### **CIM Course Management is located at:**

nextcatalogue.coastmountaincollege.ca/courseadmin/

#### **CIM Console**

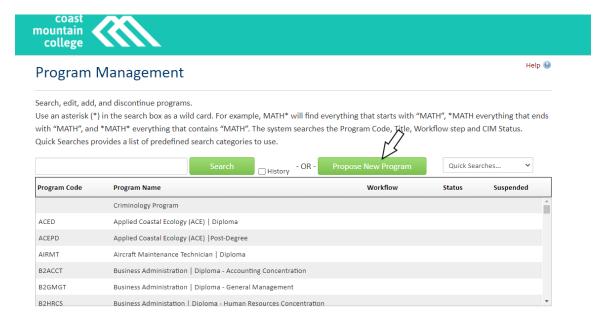
nextcatalogue.coastmountaincollege.ca/courseleaf/

#### **Proposal Approval**

nextcatalogue.coastmountaincollege.ca/courseleaf/approve/

## Submitting a Program Proposal

To propose a new program, click on the green "Propose New Program" button at the top of the Program Management page.

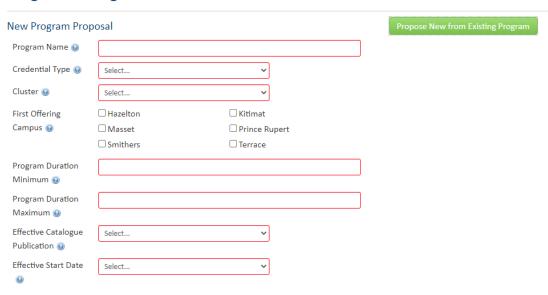


Once you press 'Propose a New Program, a new window will pop up with the Program Proposal form.

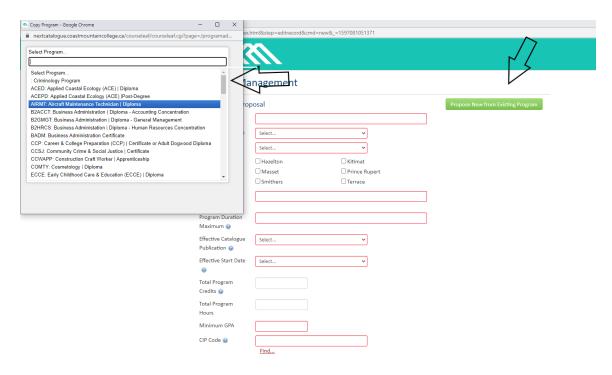
All fields outlined in red are required.

Help bubbles are provided for every line item to help guide you fill in the correct information.

### Program Management



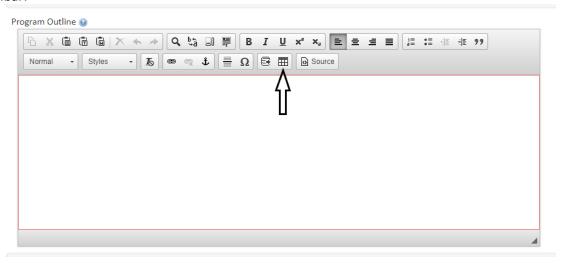
If you are proposing a program similar to an existing program, or a dual or co-terminal degree involving an existing program, you should click on the green "Propose New from Existing Program" button at the top-right of the program form. Select the program form you wish to copy and click "Copy Program."



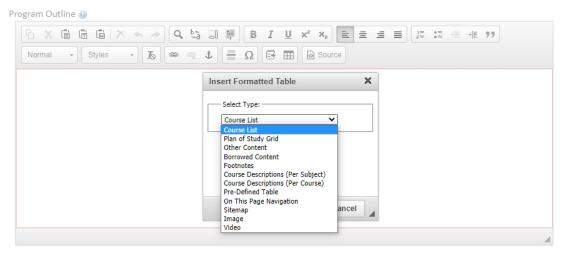
This will allow you to pre-populate the form with the data from an existing program and make only the needed modifications.

### Using the Page Body Editor

There are several portions of the program proposal form that will require that you enter information into a page body editor. While plain text may be entered into the page body editor, you may find it useful to insert a formatted table for a course list for program outline. To add a formatted table, click on the "Insert/Edit Formatted Table" icon on the page body editor toolbar:



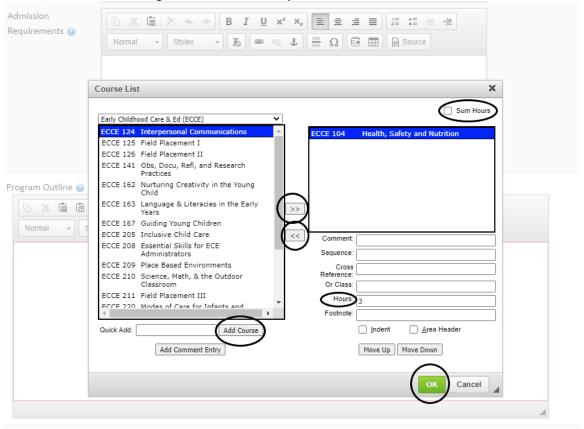
Choose the desired table from the drop-down menu and click "OK." The Course List table should be used to provide a list of courses required in program outline, while the Plan of Study Grid should be used for a semester-by-semester sample curriculum



#### Course List

A course list is a formatted table option that is generally used to display degree requirements. Below is a diagram of how to add courses to your course list table.

In order to add a course, you can browse for a course by college and academic unit, click on the course, and click on the right arrow to add it to your list:



- If you already know your course number, you may instead type the course directly in the Quick Add field and click "Add Course"
- If you would like the course list to automatically total your program credit hours, check the "Sum Hours"
  - When your course list is complete, click "OK".
  - 1. Comment A comment will be displayed in parentheses after the course title.
  - 2. Sequence Sequence will display two courses with an ampersand (&) indicating that these two courses must be taken in conjunction with each other.
  - 3. Cross Reference- A cross reference course describes a course that is the same course content offered under different course numbers
    - a. For instance, if credit is given at both the undergraduate and graduate level.
    - b. Another example is a course that is offered by different departments for credit.
  - 4. Hours The hours field is automatically populated with the credit hours assigned to the course in your student information system. You can change these as necessary.

- 5. Or Class This will display two courses with the word "or" indicating that either course may be taken to meet the requirement.
- 6. Footnote Only the footnote symbol is entered in the course list, then add a Footnote table (p. 24) after the course list in the Page Body.
- 7. Indent The item will be indented to the right, the credit hours will be suppressed from displaying, and credit hours will be suppressed from adding to your Total Credits. You may also use the hotkey Alt+I to select this check box.
  - a. For example, a Comment Entry of "Select one of the following:" may proceed a list of indented courses. This allows users to see all of the
- 8. options, without adding the credit hours of each course to the Total Credits.
- 9. Area Header The item will be styled as a header within the table. You may also use the hotkey Alt+A to select this check box.
  - a. This option is typically used to logically group courses within a Course List.
  - b. For example, grouping "Elective Courses" separately from "Required Courses".

\*Note: Multiple course codes may be added in the Sequence, Cross Reference or Or Class fields, separated by a comma. To include an ampersand (&) in an Or Class, include the ampersand. For instance, to display ACCT 101 OR ACCT 102 & ACCT 103, put ACCT 102 & ACCT 103 in the Or field of the ACCT 101 course.

## Saving or Submitting a Program Proposal

If you need to finish a program proposal later, you can click on the gray "Save Changes" button at the bottom of the program form.



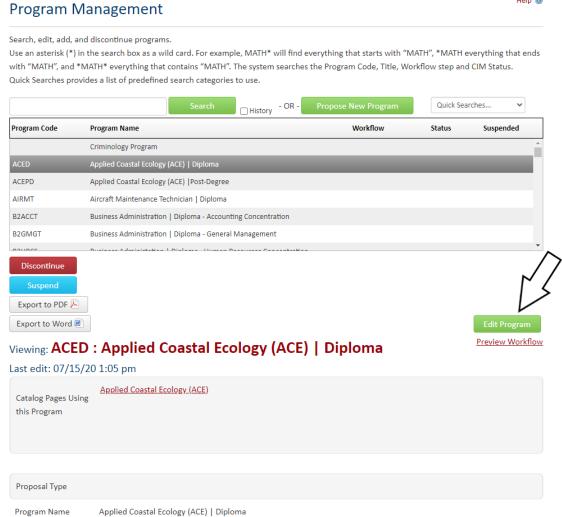
You will be able to access your saved draft later on the main Program Management page. If you have completed your program proposal, you may click on the green "Save and Start Workflow" button:



This will submit your program to the first level approver for review, usually your department/Cluster chair.

### **Program Revision**

To edit an existing program, click on the program within the program index and click on the green "Edit Program" button on the upper-right of the program summary.



Note: You may only edit programs that are "at-rest" and are not already in an approval queue. The program revision form will populate with the latest approved version of the program. You will need to enter the appropriate changes and the intended effective term.

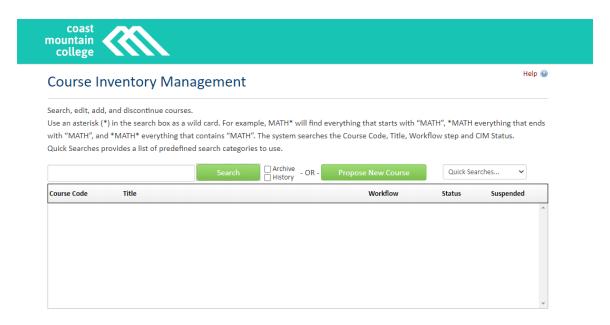
If you need to finish a program proposal later, you can click on the gray "Save Changes" button at the bottom of the program form. You will be able to access your saved draft later on the main Program Management page.

If you have completed your program proposal, you may click on the green "Save and Start Workflow" button.

### **Course Inventory Management**

#### **CIM Course Management is located at:**

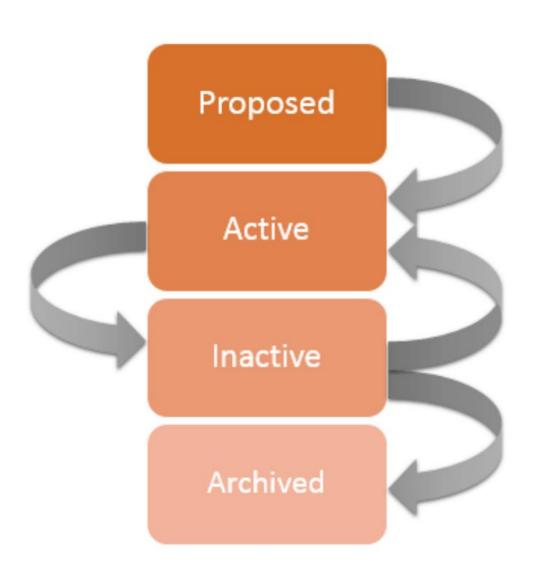
nextcatalogue.coastmountaincollege.ca/courseadmin/



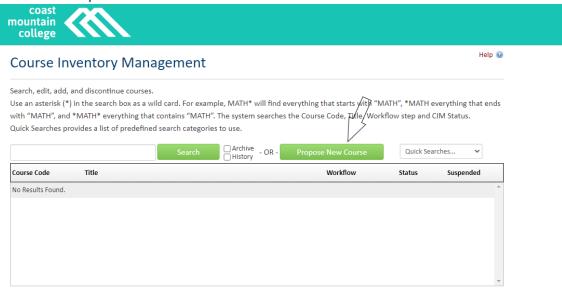
The following statuses may appear (Note: The following status names may be different in your implementation, such as Modified rather than Edited):

- Added This status indicates that a New Course Proposal has been initiated for this
  course. Search for added courses to find course proposals that were saved but not
  submitted.
- Edited This status indicates that a course that previously existed in the Student Information System has been edited.
- Deactivated This status indicates that a course has been proposed to be made inactive or is currently inactive in the Student Information System.
- Blank This indicates that the course exists in the Student Information System, but it is not in any CIM proposal process at this time. It is at rest.

Course Code Lifecycle A Course Code (typically the subject code and course number) can be in one of four stages. It can be New, Active, Inactive, or Archived. 42 CourseLeaf Curriculum (CIM)

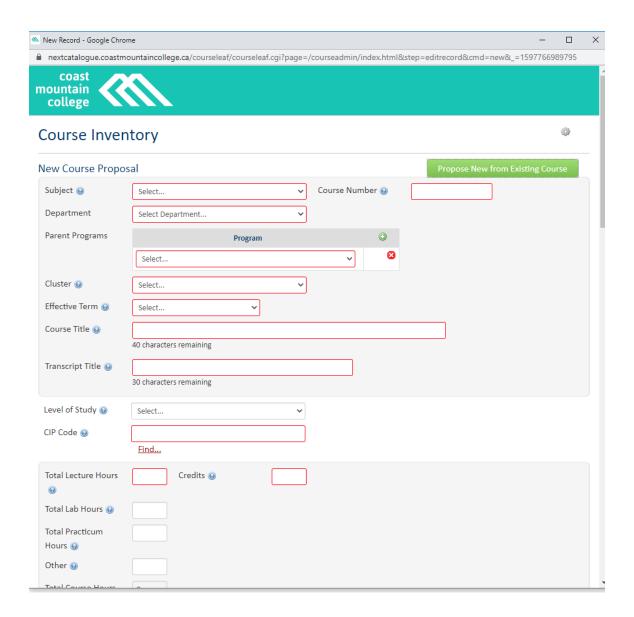


### How to Propose a New Course



- 1. Click Propose New Course
- 2. Complete the form by filling in required information
- 3. After completing the form, click one of the following:
  - a. Cancel to not save any changes and return to the previous window
  - b. Save Changes to save any changes that have been made and come back to the form at a later time. Clicking Save Changes does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses.
  - c. Save & Submit (Start Workflow) to save and submit all changes for approval. All required fields must be filled out before the proposal can be, submitted for approval. The new course proposal will go to the next person in the workflow.

The next user in workflow will be sent an automated email to notify the user the new course proposal is ready to be reviewed, edited, approved, or rejected.



## **Approving Program Proposals**

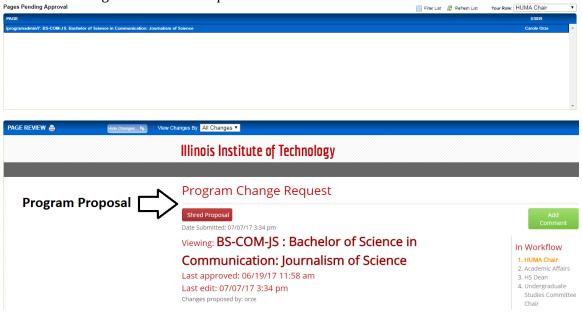
Individuals with an approval role in CIM Program Management will be sent an automated email notification when a new program proposal is ready to be reviewed, edited, approved, or rejected. The email will include a link to the program approval website:

nextcatalogue.coastmountaincollege.ca/courseleaf/approve/



Please change the approval page setting to your queue by using the drop down menu for "Your Role"

Click on the appropriate program proposal. The proposal will populate in the blue window below titled "Page Review": Example below



You may view changes to a proposal all at once, or filter by each user who has edited the proposal. To change the view, click on the drop-down menu next to "View Changes By":



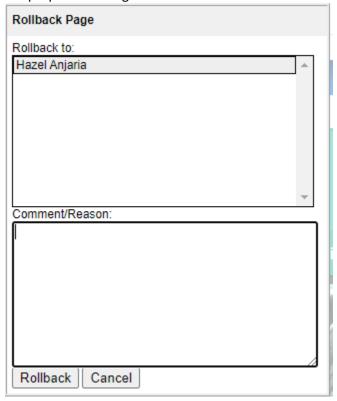
You will see three buttons on the top-right of the Page Review window

#### 1. The blue "Edit" button will allow you to edit the submitted proposal.

Clicking on this option will allow you to enter the proposal form and make changes. You then may submit the proposal to workflow, and the updated proposal will be sent to the next approval step.

2. The red "Rollback" button will send the proposal back to a previous step in the workflow.

You will need to identify to which approval step you wish to return the proposal (i.e. proposer, department, Undergraduate Studies Committee). You will also need to supply comments on why the proposal is being returned.



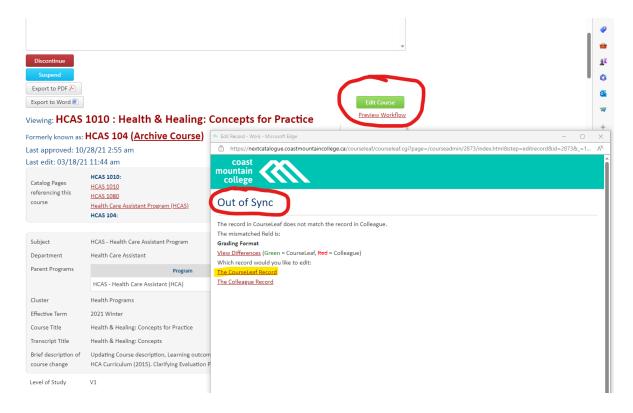
4. The green "Approve" button will record your approval and move the proposal to the next step in the workflow.

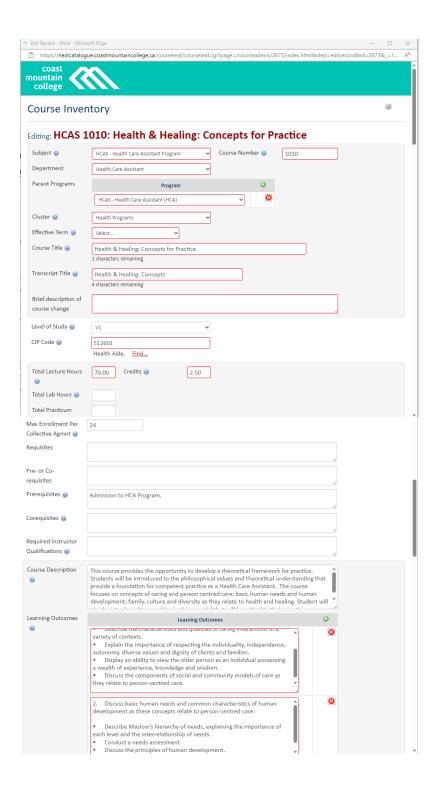
## **CIM Troubleshooting**

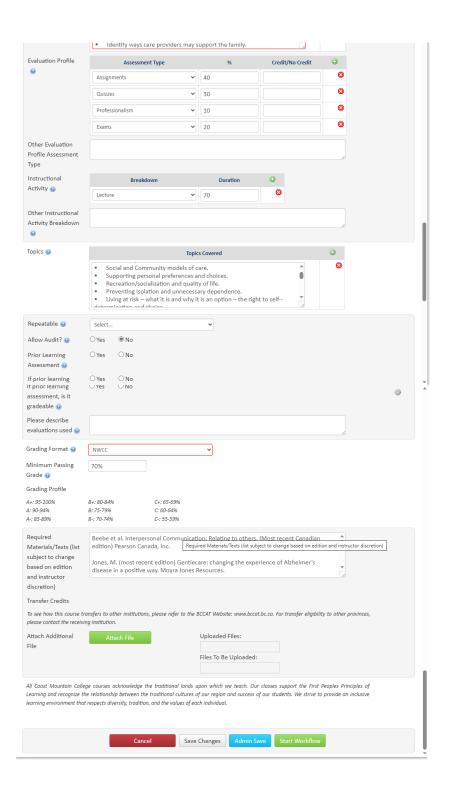
#### **Out of Sync Error**

If you are receiving an out of sync error, please follow the steps listed below.

- 1. When you select "edit course," you will get an error message pop-up.
- 2. In the pop-up window, please select "the Courseleaf record."
- Once you select "Courseleaf record," you will have another pop-up window showing you where the errors are in the record. Errors are outlined in the red boxes.
- 4. In this case, the errors listed below need to be corrected.
  - a. CIP Code.
  - b. Total lecture hours.
  - c. Learning outcomes, please ensure that each learning outcome is listed in its own box.
  - d. Topics covers, please ensure that each topic is listed in its own box.
  - e. Grading format, please do not use NWCC.
- 5. Once this is completed, you will be able to start the workflow.







# **Contact Information**

If you have any questions about CourseLeaf CIM Program & Course Management, please contact Aman Kang or Sarah Grielens