CIM by CourseLeaf Training

Lisa Robinson
Lisa.Robinson@tamuc.edu
LeLe Hobbs
LeWanna.Hobbs@tamuc.edu
Dr. Marila Palmer
Marila.Palmer@tamuc.edu
Karin Thomas
Karin.Thomas@tamuc.edu
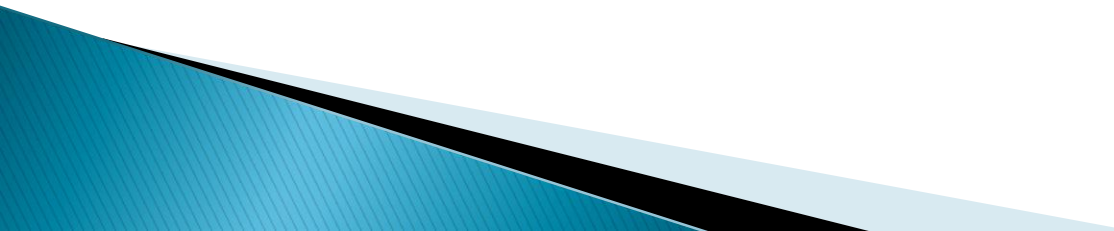
Training Overview

- Module I: Basic Information
- Module II: Course Inventory Management
- Module III: Program Inventory Management
- Module IV: Approval Process

Basic Information

Basic Information

After completing this module you should know the following:

- Purpose of CourseLeaf
- Benefits of CourseLeaf
- Limitations of CourseLeaf
- Expectations of Users
- Commitments of Software Administrators to Users
- Resources

Purpose

This software is an additional component of a suite. The core aims of using this software are:

- Ease burden of paperwork to faculty members by leveraging technology
- Eliminate errors that occur during transfer of information between the 4 locations (curriculum form, banner, catalog and DegreeWorks)
- Create centralized web based location for collection, storage, exchange, and historical documentation of changes
- Streamline the sharing of information between offices
- Shorten the timeline by removing barriers such as sending paper to the next office in the approval flow, and automatically notifying next steps

Benefits

- Easy Access– any internet connection allows you to access the software from any location
- Simple Format– forms are laid out based on input of professors, department heads and administrators to maximize ease of use
- Historical Storage– all changes are tracked and stored
- Single Point of Entry– Data for banner and the catalog only need to be entered in a single location
- Automated Workflow– software manages the workflow of each edit and sends it to the next person in the process
- Better Communication– Communication fields allow for committee members to communicate between meetings

Limitations

- Future Changes Not Allowed- Software cannot save changes if they are not for the current curriculum cycle
- External Forms Not Included- Forms required by the system, accrediting bodies or THECB must still be completed outside of the system (these agencies require a specific forms to be used)
- Limited Predictive and Error Checking Functions- Faculty and administrators are still responsible for ensuring that information input is accurate and that changes made are permissible/ acceptable by standards of external agencies such as SACS
- DegreeWorks- Tools are available for DegreeWorks but they are limited and are still being developed

Expectations of Users

▸ Data entered is accurate and adheres to all necessary standards including those outlined by external agencies

▸ Items are actually reviewed and not simply passed along

▸ Deadlines are followed

Commitments of Software Administrators to Users

- Timely responses to emails, requests for assistance and phone calls
- Appropriate reminders
- Access to resources such as training and FAQs

Resources

Feel free to contact:
Lisa Robinson
Lisa.Robinson@tamuc.edu

Karin Thomas
Karin.Thomas@tamuc.edu

Office of the Registrar webpage:
http://www.tamuc.edu/admissions/registrar/default.aspx

Course Inventory Management

CIM Course Inventory

After Completing this module you should know:

- How to access CIM courses
- How to navigate the landing page
- How to edit a course
- How to add a course
- How to deactivate a course

How to Access the Site

Open your web browser
You will need to use one of the following browsers:
- ❑ Chrome
- ❑ FireFox

Moreover you should use the current version (or at least be within 2 versions)

Enter the web address in your URL
The web address is:
https://nextcoursecatalog.tamuc.edu/courseadmin/

Log in
Locate and click the log in icon; it is a book with a graduation cap

Your Credentials
User Name: lastnamefirstname
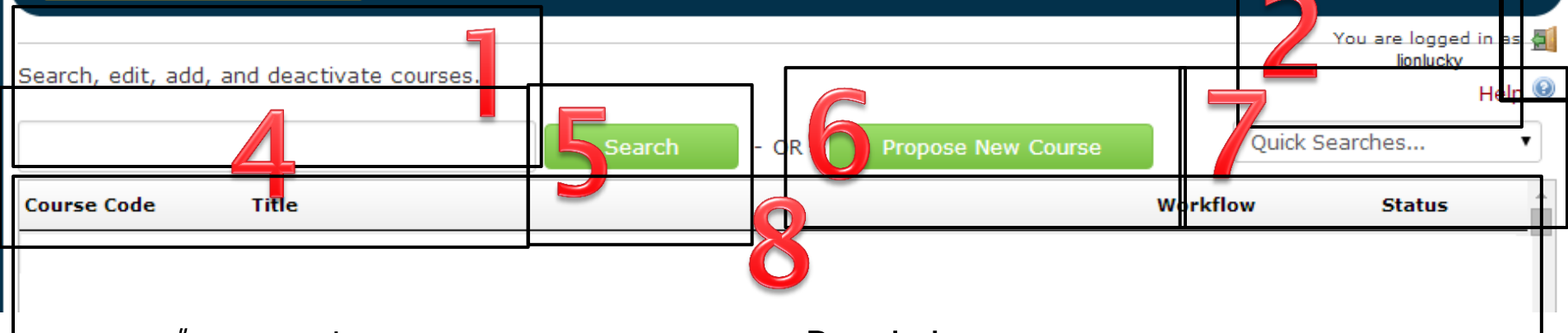Password: Will be provided at training

Landing Page

#	Item	Description
1	Software Title	Shows that you are managing courses
2	Log In Information	Tells who is logged in
3	Log off Icon (Exit Door)	Allow you to log off
4	Search Box	Allows you to enter search criteria
5	Search Button	Executes search
6	Propose New Course	Allows you to add a new course
7	Quick Searches	Will sort previously submitted documents
8	Result Box	Displays items that match your search

Editing a Course

After completing this section you will know:

- When to edit a course
- How to search for existing courses
- How to use the software

Is This Really an Edit?

Edit a course if you need to correct:

✓ Course Type
✓ Semester Credit Hours
✓ CIP Code
✓ Short Title
✓ Long Title
✓ Course Description
✓ Meet Times
✓ Prerequisites
✓ Corequisites

✓ Cross-listings
✓ Variable Credit
✓ Repeatable Limits
✓ Unique Campus Offerings
✓ Changes to Core Curriculum
✓ Offering
✓ Grading Method

Is This Really an Edit?

Do NOT edit a course if you need to change:

X Subject Prefix (instead delete old course add new course)

X Course Number (instead delete old course add new course)

X Deactivate a course (use deactivate not edit)

X Add a new course (use add not edit)

How to search for existing course

Options to search

1. Enter the full course prefix and course number
2. Enter prefix followed by an * when course number is unknown
3. Enter * followed by course number when prefix is unknown
4. Enter * key word * when only a key word is known
5. Enter * to return all courses

{Live Demo}

How to use the Software

After you locate the course you need to edit, click **Edit Course**

This will bring up the Course Inventory record for the course. Simply make edits as needed!

It's just like using a word processor. Review and answer every question for most accurate edit.

For a Glossary of Terms and fields used on the form, please visit the Curriculum Area of the Registrar's Office website.

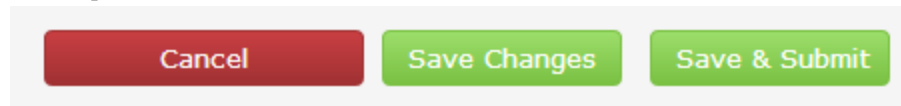Questions about the form can be submitted to Lisa.Robinson@tamuc.edu

Important Notes

- Fields with red outlines are required
- You need to provide thorough justifications
- Attachments are allowed
- Review every question

How to use the Software

Once edits are complete, there are 3 Options :

Cancel: Will not save any changes, its like you never made an edit.

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Adding a Course

After completing this section you will know:

- When to add a course
- How to obtain a valid course number
- How to use the software

Is This Really an Add?

Add a course if you need to:

✓ Add a course never before offered
✓ Change Subject Prefix
When you change a subject prefix, state regulations require that you actually add a new course. To minimize confusion you should also delete the course with the old course prefix.

✓ Change Course Number
When you change a course number, state regulations require that you actually add a new course. To minimize confusion, you should also delete the course with the old course number.

Is This Really an Add?

Do NOT add a course if you simply need to change one or more of the following:

X Course Type
X Semester Credit Hours
X CIP Code
X Short Title
X Long Title
X Course Description
X Meet Times
X Prerequisites
X Corequisites
X Cross-listings

X Variable Credit
X Repeatable Limits
X Unique Campus Offerings
X Changes to Core Curriculum
X Offering
X Grading Method
X Deactivate a course

How to obtain a valid course number

Email Lisa.Robinson@tamuc.edu with the subject "New Course Number".

In the email, provide the level of the course (freshman, sophomore, junior, senior, masters, doctoral) and the course prefix.

If you already have a course number in mind, great! Provide it in the email and we will check to see if the number is available.

How to use the Software

After you decide that you need to add a course, click **Propose New Course**

This will bring up an empty Course Inventory record. Simply add the required information!

It's just like using a word processor. Review and answer every question for the most accurate addition.

For a Glossary of Terms and fields used on the form, please visit the Curriculum Area of the Registrar's Office website.

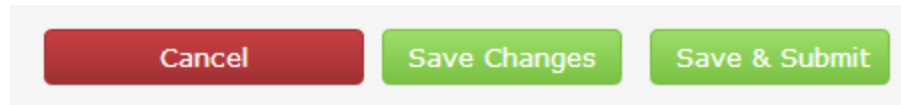Questions about the form can be submitted to Lisa.Robinson@tamuc.edu

Important Notes

- Fields with red outlines are required
- You need to provide thorough justifications
- Attachments are allowed
- Review every question

How to use the Software

Once edits are complete, there are 3 Options :

Cancel   Save Changes   Save & Submit

Cancel: Will not save any changes, its like you never made an addition

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Deactivating a Course

After completing this section you will know:

- When to deactivate a course
- How to use the software

Is This Really a Deactivation?

Deactivate a course only if you need to:

✓ Remove the course from the University Inventory
When you remove a course we will remove it from the state inventory, but it will not be removed from Banner. Instead, banner will show that the class has been deactivated and therefore will not be allowed for offering.

Is This Really a Deactivation?

Do NOT deactivate a course if you simply need to change one or more of the following:

X Course Type
X Semester Credit Hours
X CIP Code
X Short Title
X Long Title
X Course Description
X Meet Times
X Prerequisites
X Corequisites
X Cross-listings

X Variable Credit
X Repeatable Limits
X Unique Campus Offerings
X Changes to Core Curriculum
X Offering
X Grading Method
X Add a course

How to use the Software

After you find the course you need to deactivate, click **Deactivate**

This will bring up the deactivation confirmation page

It's just like using a word processor.

Enter the term in which the course should end

Type in your justification

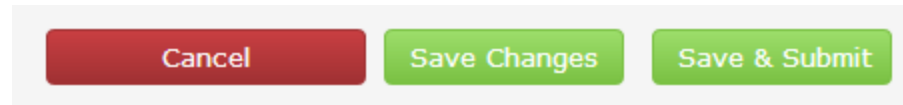Questions about the form can be submitted to Lisa.Robinson@tamuc.edu

Important Notes

- ➢ Fields with red outlines are required
- ➢ You need to provide thorough justifications
- ➢ Attachments are allowed
- ➢ Review every question

How to use the Software

Once questions are answered, there are 3 Options :

Cancel | Save Changes | Save & Submit

Cancel: Will not save any changes, its like you never made an addition

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Program Inventory Management

CIM Program Inventory

After Completing this module you should know:

- How to access CIM program
- How to navigate the landing page
- How to edit a program
- How to add a program
- How to deactivate a program

How to Access the Site

Open your web browser
You will need to use one of the following browsers:
- ❑ Chrome
- ❑ FireFox

Moreover you should use the current version (or at least be within 2 versions)

Enter the web address in your URL
The web address is:
https://nextcoursecatalog.tamuc.edu/programadmin/

Log in
Locate and click the log in icon; it is a book with a graduation cap

Your Credentials
User Name: lastnamefirstname

Password: Will be provided at training

Landing Page

#	Item	Description
1	Software Title	Shows that you are managing programs
2	Log In Information	Tells who is logged in
3	Log off Icon (Exit Door)	Allow you to log off
4	Search Box	Allows you to enter search criteria
5	Search Button	Executes search
6	Propose New Program	Allows you to add a new program
7	Quick Searches	Will sort previously submitted documents
8	Result Box	Displays items that match your search

Editing a Program

After completing this section you will know:

- When to edit a program
- How to search for existing programs
- How to use the software

Is This Really an Edit?

Edit a Program if you need to correct:

- ✓ CIP Code
- ✓ Title
- ✓ Delivery Method
- ✓ Program Hours
- ✓ Course Requirements

Please work with Program Approval Coordinator if you have any questions. Changes to programs must adhere to all rules set forth by accrediting agencies, system polices, state and federal regulations.

The office of the registrar expects that faculty will work with the Program Approval Coordinator if they have any questions or concerns about what is permissible. Karin.Thomas@tamuc.edu

Is This Really an Edit?

Do NOT edit a program if you need to :
X Deactivate the program (use deactivate not edit)
X Add a new program (use add not edit)

Special Notes:

It is strongly recommended that department heads and deans meet with college academic advisors PRIOR to making changes to programs.

If you have any concerns about permissibility of changes, please contact Karin Thomas.

How to search for existing programs

To search
Enter * key word * to return all programs which contain this keyword

How to use the Software

After you locate the program you need to edit, click **Edit Program**

This will bring up the Program Inventory record for the course. Simply make edits as needed!

{We will complete a live demonstration of how to use the form features}

For a Glossary of Terms and fields used on the form, please visit the Curriculum Area of the Registrar's Office website.

Questions about the form can be submitted to Lisa.Robinson@tamuc.edu
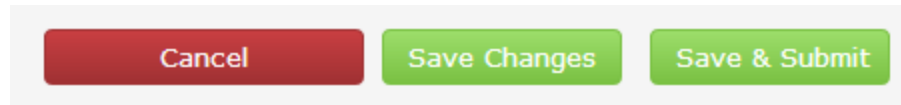
Important Notes

- Fields with red outlines are required
- You need to provide thorough justifications
- Attachments are allowed
- Review every question

How to use the Software

Once edits are complete, there are
3 Options :

Cancel: Will not save any changes, its like you never made an addition

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Adding a Program

After completing this section you will know:

- When to add a program
- How to obtain a valid program code
- How to use the software

Is This Really an Add?

Add a program if you need to:

✓ Add a program never before offered

Please work with Program Approval Coordinator if you have any questions. New programs require several external documents that must be attached and/or completed prior to being entered in this software.

The office of the registrar expects that faculty will work with the Program Approval Coordinator if they have any questions or concerns about what is permissible. Karin.Thomas@tamuc.edu

Is This Really an Add?

Do NOT add a program if a similar program already exists.

How to obtain a valid program code

Email Lisa.Robinson@tamuc.edu with the subject "New Program Code".

In the email, provide the name of the program, including the major. Also provide the type(s) of degree to be awarded (BA, BS, BBA, MS, Med, etc.) in association with this program.

How to use the Software

After you decide that you need to add a course, click **Propose New Program**

This will bring up an empty Program Inventory record. Simply the required information!

It's just like using a word processor. Review and answer every question for the most accurate addition.

For a Glossary of Terms and fields used on the form, please visit the Curriculum Area of the Registrar's Office website.

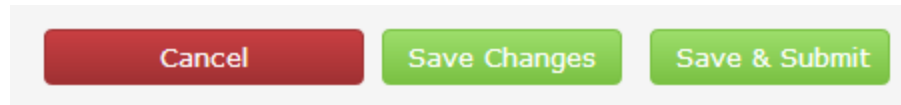Questions about the form can be submitted to Lisa.Robinson@tamuc.edu

Important Notes

- Fields with red outlines are required
- You need to provide thorough justifications
- Attachments are allowed
- Review every question

How to use the Software

Once edits are complete, there are 3 Options :

Cancel: Will not save any changes, its like you never made an addition

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Deactivating a Program

After completing this section you will know:

- When to deactivate a program
- How to use the software

Is This Really a Deactivation?

Deactivate a program only if you need to:

✓ Remove the program from the University Inventory and Catalog

When you remove a program we will remove it from the University catalog. We will also work with the Program Approval Coordinator to have it phased out on the state inventory

Is This Really a Deactivation?

Do NOT deactivate a program if do not wish to have it removed from the catalog and state inventory

How to use the Software

After you find the course you need to deactivate, click **Deactivate Program**

This will bring up the deactivation confirmation page

It's just like using a word processor.

Enter the term in which the course should end

Type in your justification

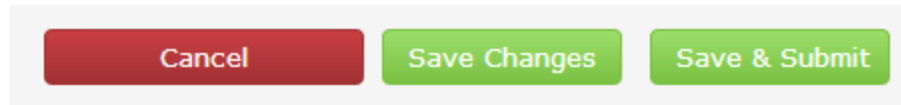Questions about the form can be submitted to
Lisa.Robinson@tamuc.edu

Important Notes

➢ Fields with red outlines are required
➢ You need to provide thorough justifications
➢ Attachments are allowed
➢ Review every question

How to use the Software

Once questions are answered, there are 3 Options :

Cancel: Will not save any changes, its like you never made an addition

Save Changes: Will save your changes so that you can come back and review them later but will not move them for submission. Changes saved, but not submitted will be deleted prior to the close of the cycle.

Save & Submit: Will save your changes and submit them to the next person in a workflow for approval.

Important Notes

Changes are not saved for the next year. Anything not processed in the current cycle will be deleted and must be resubmitted in the future.

Approval

»

Approval

After Completing this module you should know:

- University Procedure for Curriculum Changes
- Approval Workflow
  ◦ Courses
  ◦ Programs
- How to access the approval site
- How to navigate the landing page
- How to review request awaiting approval
- Taking action

University Procedure

The curriculum change process is governed by procedure 03.02.99.R0.01

03.02.99.R0.01 **New Program and Curriculum Approval Process**
Approved September 1, 1996
Revised October 2002
Revised October 18, 2011
Revised September 4, 2012
Next Scheduled Review September 4, 2017

Procedure Statement

Texas A&M University-Commerce (A&M-Commerce) maintains approval processes for new program development, program delivery and curricular changes. All actions are to be in accord with approval by the appropriate University bodies, The Texas A&M University System (A&M System), the Texas Higher Education Coordinating Board (THECB) and the Southern Association of Colleges and Schools of the Commission of Colleges (SACSCOC).

Reason for Procedure

This procedure describes the university's institution-wide processes for programmatic and curricular changes. It establishes the processes that must be followed in order to be within the guidelines and standards set by the university and external accreditation bodies.

This procedure is designed to be consistent with, and work in conjunction with, the University's Substantive Change Procedures. (03.02.99.R0.03 Programmatic and Administrative Substantive Changes Approval Process)

The university maintains an online electronic approval process that will mirror this process. Electronic signatures will be utilized in the system with the exception of the wet signatures and acknowledgements included on page 12 of this procedure.

Approval Path- Courses

Existing course edits, new courses proposals and course deactivations all receive approval in the following order:

Department Curriculum Committee
Department Head
University Studies Committee*
College Faculty Curriculum Committee
College Executive Committee
New Program Review Committee (FYI only)
Provost Office Checker (FYI Only)
Faculty Senate Curriculum Committee
Faculty Senate
Graduate Council*
Deans Council
Associate Provost
Initiator

Important Notes

- "*" Indicates a step in the flow that may be skipped if the change is not directly related to the committee
- FYI Only indicates a step in the flow that is only notified and does not have approval authority.

Approval Paths- Programs

Existing program edits and program deactivations all receive approval in the following order:

Department Curriculum Committee
Department Head
College Faculty Curriculum Committee
College Executive Committee
New Program Review Committee (FYI only)
Provost Office Checker (FYI Only)
Faculty Senate Curriculum Committee
Faculty Senate
Graduate Council*
Deans Council
Associate Provost
Initiator

Important Notes

- "*" Indicates a step in the flow that may be skipped if the change is not directly related to the committee
- FYI Only indicates a step in the flow that is only notified and does not have approval authority.

Approval Paths- Programs

New program proposals all receive approval in the following order:

Department Head
College Dean
Associate Provost IE
Associate Provost
Department Curriculum Committee
College Faculty Curriculum Committee
College Executive Committee
New Program Review Committee (FYI only)
Provost Office Checker (FYI Only)
Faculty Senate Curriculum Committee
Faculty Senate
Graduate Council*
Deans Council
Associate Provost
Initiator

Important Notes

- "*" Indicates a step in the flow that may be skipped if the change is not directly related to the committee
- FYI Only indicates a step in the flow that is only notified and does not have approval authority.

How to Access the Site

Open your web browser
You will need to use one of the following browsers:
- ❑ Chrome
- ❑ FireFox

Moreover you should use the current version (or at least be within 2 versions)

Enter the web address in your URL
The web address is:
https://nextcoursecatalog.tamuc.edu/courseleaf/approve/

Log in
Locate and click the log in icon; it is a book with a graduation cap

Your Credentials
User Name: lastnamefirstname
Password: Will be provided at training

Landing Page

#	Item	Description
1	Software Title	Shows that you are attending to approvals
2	Log In Information	Tells who is logged in
3	Log off Icon (Exit Door)	Allows you to log off
4	Search Options	Allows you to filter and refresh your list
5	Role Display	Displays your role
6	Page Data and Information	Allows you to check status of page
7	Search Results/Pages	Pages Pending Approval
8	Action Bar	Allows you to take action on the page

Review Request Awaiting Approval

You will receive an email when a page requires you to take action.

You can access this page via the following methods:

▸ Option 1: Click on the link in the notification email

▸ Option 2: Navigate directly to the approve site and select the role that has outstanding pages you want to review

Taking Action

Once you have accessed the page that requires your review, you will need to take action.

The following actions are permissible:

Edit — If you notice small errors like typos, spelling, etc. that need to be fixed, you can make the correction and then approve.

Rollback — If there are major questions/ problems that need to be corrected you can roll the request back. Though you have options to rollback to numerous people, **you should ONLY rollback to the reviewer prior.** If you have question beyond that prior approver, add them in your commentary or reach out via email to the necessary persons. **Never rollback to the initiator**, this is equivalent to an automatic denial and will result in the request not making through the cycle.

Approve — If you agree with the changes and have checked that all information is correct, approve the page to move it to the next stage.