CIM CHEAT SHEET:
Instructions for Working with CIM

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Overview

The big picture
The CourseLeaf system includes Course Inventory Management (CIM) and Catalog (CAT), which enables universities to manage their curriculum and degree requirements in addition to an academic catalog. The KU Lawrence and KUMC campuses have a shared CourseLeaf system, but each campus manages its own entries with Lawrence being the final approver for (program) degree requirement updates.

CIM is only one part of the CourseLeaf system. There are two academic aspects that are managed through CIM: courses and programs, with the two portals being titled, CIM Courses and CIM Programs, respectively. These systems are used to propose new courses and programs, edit current courses and programs, and/or deactivate (retire) courses and programs. CIM Programs is the portal used to edit current degree requirements and/or propose new programs.

All courses from the Lawrence/Edwards and KUMC campuses are included in the CIM Courses portal. Those courses integrate into CIM Programs (and ultimately the Academic Catalog). This allows departments to directly link the courses into their degree requirements. This is beneficial for the end users who view this through the course listings in Enroll and Pay and/or the Academic Catalog. When they click on (or hover over) the course, they will be linked to the description of the course including the title, description, and number of credit hours.

Purpose of this cheat sheet
This cheat sheet provides instructions for accessing, editing, proposing, and approving CIM courses and programs. There are also instructions for how to edit a course/program, propose a new course/program, and deactivate (retire) a course/program.

Key contacts for the CourseLeaf system
For questions or concerns regarding the CourseLeaf system, contact the following individuals at KUMC. Those who contact the Lawrence office will be redirected back to the KUMC office.

Carrie Scala
Associate Registrar, Registrar’s Office
cscala@kumc.edu

Val Abbott
Sr. Coordinator, Office of Graduate Studies
vabbott@kumc.edu
Getting Started

Links to CIM system
It is recommended to save or bookmark the CIM links for easy access in the future.

- CIM Courses
  - https://next.catalog.ku.edu/courseadmin/
- CIM Programs
  - https://next.catalog.ku.edu/programadmin/
- Approval Page
  - https://next.catalog.ku.edu/courseleaf/approve/

Obtaining a CourseLeaf ID
Each user will need a KU-Lawrence ID and password to access the system. Please contact Carrie Scala (cscala@kumc.edu) or Val Abbott (yabbott@kumc.edu) for assistance with obtaining a user ID from KU-Lawrence.
CIM Courses

The CIM Courses portal is where users can propose new courses, edit current courses, and/or deactivate (retire) courses.

Proposing new courses
To propose a new course, use the CIM Courses portal: https://next.catalog.ku.edu/courseadmin/

Prior to proposing a new course, it is important for the department to have the information prepared for each of the fields. In addition to the fields on the CIM Courses proposal, the department should attach a syllabus for review by the Graduate Council. The instructor’s CV should also be attached if the instructor has already been determined.

1. Log in to the CIM Courses portal using your Lawrence ID and password.
   a. https://next.catalog.ku.edu/courseadmin/
2. After logging in, the page should look like this:

3. Select Propose New Course.
4. A new window will appear; scrolling enables visibility to all of the fields (see images below). However, additional fields will appear as the form is completed. The fields outlined in red are the required fields for proposing the new course.
5. Before submitting the course, it is important to ensure the accuracy of the information and that the appropriate documents are attached. Appropriate documents include a course syllabus and a CV for the faculty that may be teaching the course.
   a. **Save Changes** allows the information to be saved without submitting the course and pushing it into the workflow. It can then be accessed again and submitted after additional editing or review.

6. **Submit** will push the course to the approval stage for the first role and its respective user(s) listed in the workflow.

**Working with existing courses**

There are four main reasons to work with an existing course.

1. **Editing an existing course.** When there are changes to the course title, description, credit hours, etc., an existing course can be edited.

2. **Retiring a course.** When courses are no longer relevant or used, a course can be retired and withdrawn from the course catalog.

3. **Finalizing a proposed course.** When there is a course that is still in the proposal stage and was only saved, it can be pulled up again for another review and/or edits.

4. **Generic search.** Searching for a course enables access to historical records and details that may be valuable points of reference for building new courses or programs.

Below are the steps for working with existing CIM courses.

1. Log in to the CIM Courses portal using your Lawrence ID and password.
   a. [https://next.catalog.ku.edu/courseadmin/](https://next.catalog.ku.edu/courseadmin/)

The above screenshot would be visible after the initial login. Note that Lawrence courses will also be included.
2. To search for a current course, include the course code and number.  
   a. If the number is not available, use the course code followed by an asterisk as a wildcard. 
      i. Example: ANAT* for Anatomy courses 
3. Once a course is selected (indicated by the course being highlighted in gray), click to open it. 
   a. Scrolling down enables visibility to all course information.

4. If the course needs to be edited and then submitted to the workflow, select Edit Course and proceed with editing. 
5. When the editing is complete, there are two options available after scrolling to the bottom of the page:
   a. Save Changes – This is used in cases where it is necessary to return to the course later after confirming details. 
   b. Submit – This is used when the course is ready to be submitted into the workflow. 

These are the button options that are available at the bottom of the page.
CIM Program

The CIM Program portal is where users can propose new programs, edit degree requirements for current programs, and/or deactivate (retire) programs. Editing degree requirements (as needed) is available year-round. However, departments are asked to review their programs each fall semester in conjunction with the academic catalog review/editing process.

Please note there are several administrative steps involving the Dean of Graduate Studies and the Kansas Board of Regents (KBOR) prior to new program approval. Depending on the level of program being proposed, the total completion time for this process is 12-24 months. It is best to set up a consultation meeting with the Dean of Graduate Studies to confirm the process.

Proposing new programs
To propose a new program, use the CIM Programs portal: https://next.catalog.ku.edu/courseadmin/

Prior to proposing a new program, it is important for the department to have the information prepared for each of the fields. This could be extracted from the written proposal that is completed for KBOR approval.

1. Log in to the CIM Program portal using your Lawrence ID and password.  
   a. https://next.catalog.ku.edu/programadmin/
2. After logging in, the log in screen should look like this:

3. Select Propose New Program.
4. A new window will appear and should look like the following. The fields outlined in red demonstrate the required fields for proposing the new course. Additional fields will appear as the form is completed.
New Program Proposal

Academic Career: Select...

Program Type: 
- Degree/Major
- Joint Degree
- Concentration

Department/Program: Select Department/Program...

School/College: Select School/College...

Consulting School(s)/College(s): Select...

Consulting Department(s): Select...

CIP Code: Find...

PSST - Registrar use only: 25 characters remaining

Program Name: 

Program Code: 

Location(s) of Instruction: 
- Kansas City
- Salina
- Edwards
- Lawrence
- Everspring Online
- Other

Do you intend for this program to be offered online? 
- Yes
- No

Effective Catalog: Select...

Program Description: (Provide the description of the program and its intended purpose.)

Demand/need for the Program: (Provide specific information and/or data to support the articulated demand/need for the program.)

Comparative/Locational Advantage: (Determine what comparable programs are in the state/region.)

Admission Requirements:

Degree Requirements:
5. Before submitting the program, it is important to ensure the accuracy of the information and that the appropriate documents are attached.
   a. **Save Changes** allows the information to be saved without submitting the course and pushing it into the workflow. It can then be accessed again and submitted after additional editing or review.
6. **Submit** will push the program to the approval stage for the first role and its respective user(s) listed in the workflow.

**Working with existing programs**

There are three main reasons to work with an existing program:

1. **Editing an existing program.** When there are changes to the program title, description, degree requirements (including addition or removal of specific courses), etc., an existing program can be edited.
2. **Finalizing a proposed program.** When there is a program that is still in the proposal stage and was only saved, it can be pulled up again for another review and/or edits.
3. **Generic search.** Searching for a program enables access to historical records and details that may be valuable points of reference for building new courses or programs.

Below are the steps for working with existing CIM courses.

1. Log in to the **CIM Program** portal using your Lawrence ID and password.
   a. [https://next.catalog.ku.edu/programadmin/](https://next.catalog.ku.edu/programadmin/)

   ![Course Inventory Management](image)

   The above screenshot would be visible after the initial login, with Lawrence and Edward courses will also be included.
2. To search for a current program, use the program code.
   a. This is the set of 4 letters that make up a course name. Example: STAT
   b. If the course name is code is unavailable, try entering a keyword from the program title followed by an asterisk as a wildcard.
      i. Example: Biostatistics*

3. Once a program is selected (indicated by the program being highlighted in gray), click to open it.
   a. Scrolling down enables visibility to all program information.

4. If the program needs to be edited and then submitted to the workflow, select **Edit Program** and proceed with editing.

5. When the editing is complete and is ready to be submitted into the workflow, scroll to the bottom of the page and select **Submit**.

These are the button options that are available at the bottom of the page.
CIM Approval Portal

Both courses and programs awaiting approval can be found through the same portal:

https://next.catalog.ku.edu/courseleaf/approve/

1. When a proposal is ready for a user’s review, the user will receive an email notification. The email will contain a link directing the user to the specific course or program that needs to be reviewed. Below is an example email:

[CIM Courses] Review Request: KUMC Registrar

Valerie:

There are pending course change proposals awaiting your review, including NRSG 977: Acute Care Practicum III: Adult-Gero NP. Please visit:

https://next.catalog.ku.edu/courseleaf/approve/?role=KUMC%20Registrar
to review the changes and provide your feedback.

For questions or information regarding this email, please reply to this email (catalogeditor@ku.edu) or contact your school level administrator.

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a. In some cases, a user may only receive an email as an FYI. See Appendix A for an example of that email.

2. Selecting the link under Please visit will lead the user to the Approval portal.

a. The page will look like this after logging in:
3. Toward the top of the page, there is a drop-down menu titled **Your Role** with your user name displaying in the box. Click the drop-down menu to select the appropriate CIM role.

4. After selecting the correct role, all of the courses or programs awaiting approval will appear.

![Screen showing courses awaiting approval](image)

This is the screen after the role is selected.

5. Each course or program can be selected for review. The one that is selected is highlighted in blue.

6. Each selection will display the original text with red strikethrough and/or green text. The red strikethrough shows things that were removed. The green text shows things that were added.
   a. If it is a new course or program, there are no color changes.

![Sample of program text changes](image)

This is a sample of program text changes and how they are displayed.

7. For each course or program, there are three options. These are the three buttons on the far right side of the screen. **Approve** should only be selected after the course or program is reviewed; it is the user’s way of saying this is ready
   a. **Edit**. Make changes to the course or program.
   b. **Rollback**. Move the course or program to a previous role in the workflow.
   c. **Approve**. Approve the course for the next reviewer in the workflow.
Other Workflows

An overview of workflows

Workflows are standard by department with a few roles being standard across KUMC. Adherence to timelines requires careful planning by departments as there are several levels of approval needed for each submission in CIM Courses and CIM Programs. The layers of approval will vary by each school.

Any user can edit or propose a course and/or program. After something is submitted to the workflow, the user associated with the first role will receive an email prompting them to review the course or program through the Approval portal. Because at least one person associated with each role/level must approve the course or program, the proposer and/or administrator coordinating these efforts may have to send reminders to prompt action.

Below is an example of a typical workflow for the School of Medicine:

![Workflow Diagram]
The workflow typically begins with the department’s Graduate Director, moves to the Chair, then school-level approval, and then to KUMC Graduate Studies. After the KUMC Graduate Studies moves the course or program to the KUMC Graduate Council level, the course or program is added to the Graduate Council agenda for review and the Council votes to approve the course or program before it can move forward. If a new program is being proposed, a vote will take place in the Graduate Council meeting that occurs after the session in which the program was originally proposed.

After the course or program is approved at Graduate Council, the Office of Graduate Studies approves it on behalf of Graduate Council. Then it goes to the Dean of KUMC Graduate Studies before going to the KUMC Registrar. At the Registrar level, the course or program is added or updated in Enroll and Pay. Then it is moved through the rest of the process.

When complete, the Office of Graduate Studies and SIS on the Lawrence campus receive an FYI email alerting them of the changes. Finally the data sync occurs in PeopleSoft, the software platform for Enroll and Pay. This enables all KUMC students, staff, and administration with appropriate access to view the courses and programs for their respective tasks and responsibilities.

Finding the current workflow status
To find the workflow status of a specific course or program, go to CIM Courses or CIM Programs and search for the respective course or program. On the right side of the page, there is a side bar title In Workflow. Below is an example of a course currently in the workflow.

The roles/levels in green text indicate that the course has been approved. The yellow text indicates the current status or where the current review is happening. Users can click on that role to contact the associated users; clicking on the role will add the role’s users to an email window so they can be messaged.
Approval path
For courses or programs that are currently in workflow, it is possible to look at who and when each level was approved. This is in a box immediately below the In Workflow box.

In Workflow
1. STAT Graduate Director
2. STAT Chair
3. SOM Associate Dean Review
4. SOM Associate Dean Approval
5. KUMC Graduate Studies
6. KUMC Graduate Council
7. Dean of KUMC Graduate Studies
8. KUMC Registrar
9. PeopleSoft

Approval Path
1. 04/25/18 4:34 pm
   Jo Wick (jwick): Approved for STAT Graduate Director
2. 04/25/18 5:51 pm
   Shana Palla (spalla) Approved for STAT Chair

For new* courses or programs that have already been approved, it is also possible to view the approval history by selecting the name listed under History. The text appears gray, so it may not immediately appear to be a link. However, selecting the name will open a separate window with the course information along with the approval history, dates, and times.

* New courses are defined as those that have been entered into CIM.
Previewing a workflow

For courses or programs that are not in a workflow (i.e. ones that are already approved), the workflow can still be previewed. This can help a department to review which individuals they may need to remind about the approval process.

The red hyperlink Preview Workflow will open a pop-up window with the workflow for that specific course or program. The preview option is just below the Edit Program button.

![Image of the workflow preview](image)

This is the screen after selecting a program to review.
Viewing drafts to a course or program
As an approver is reviewing a course or program, the Approve Pages portal enables them to view the changes that have been made to a course or program. The original text is in black but some text will also appear with red strikethrough and/or green text. The red strikethrough shows things that were removed. The green text shows things that were added.

1. Under the Box title Pages Pending Approval, select the course to be viewed.
2. There is a blue tool bar that starts from the left with Page Review. It looks like the following:

3. Select the name of interest in the View Changes By dropdown menu.
4. To view a “clean copy” without any of the changes indicated by red or green text, select Hide Changes.
Printing course or program content
To put all of the content into a document that can be downloaded, select Export to Word or Export to PDF from below the Course Change Request at the top left corner of the course or program entry. Note that the format is not well preserved through this export action. Also, PDF versions tend to be cleaner.

Course Change Request

Export to Word

Export to PDF

Shred Proposal

Date Submitted: 04/25/18 4:01 pm

Viewing: STAT 830: Experimental Design

For printouts of an edited or new course program that is in the Approval Portal, there is a Page Review option that enables printing and/or saving of a PDF.

Page review is at the top left portion of the page, just below the Pages Pending Approval section.
Appendix A – FYI email notification example

Below is the email that users will receive if they are associated with a role that is only an FYI role with no action necessary.

Valerie:

There have been proposed changes to the course NRSG 862: Adult/Gerontological Health Care I. You may review these changes by visiting: https://next.catalog.ku.edu/courseadmin/?key=10619

No approval is necessary; this is for your review only.

For questions or information regarding this email, please reply to this email (catalogeditor@ku.edu) or contact your school level administrator.

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Thank you.

-- CourseLeaf