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Introduction to CIM

CourseLeaf Curriculum Information Management (CIM) takes the entire curriculum process online, integrates, and builds on the CourseLeaf Catalog software (CAT) to provide a comprehensive Curriculum and Catalog product. CIM Course Approval is tightly integrated with the University Catalog and ConnectCarolina.

The CIM module will import course information from ConnectCarolina, provide customized pre-populated forms for campus users (e.g., faculty, administrative staff) automatically create workflow, identity all affected courses by the proposed change, track edits and comments, report on status, generate customized PDF files on demand for committee meetings, and assist in automatically updating ConnectCarolina at the end of the process. The CourseLeaf Catalog software (CAT) will then automatically update the next University Catalog with the approved ConnectCarolina course data.

All course updates are submitted in CIM:

- Propose a new course
- Edit an active course
- Deactivate a course

Logging Into CIM

Faculty
1) Log into ConnectCarolina
2) Navigate to “My Schedule” in your “Faculty Center”
3) Click on the link: CIM: Propose or Revise a Course.

Staff
Staff may go directly to Curriculum Inventory Management page to login, or
1) Go to homepage of the Office of the University Registrar
2) Select “Courses” from the main banner menu.
3) Click on “Curriculum Inventory Management”
4) Click on “Accessing CIM”
5) Click on the link and log in with your ONYEN and password.

Course Codes and Searching for Courses in CIM

There are several ways to search for a course in CIM:

- Use the complete Course Code (e.g., “ECON 101”)
- Use an asterisk (*) in the search box as a wild card. Examples:
MATH* will find everything that starts with “MATH”
*MATH will find everything that ends with “MATH”
*MATH* will find everything that contains “MATH”

• The system searches the Course Code and Title

A new course code resides in CIM only until it has been approved and entered into ConnectCarolina, at which point it becomes active. While a proposal is new, no other proposal may be created with the same course code. If a new proposal is “shredded” (see “Shred”) before reaching approval, no record of its existence will remain, and the course code may be used again immediately.

An active course code resides in CIM and ConnectCarolina. While a proposal is active, no other proposal may have the same course code. If any active proposal is edited, the edits in CIM will display with red/green markup. If an active edited proposal is shredded, the edits will be deleted, and the course will be set back to its original content in CIM before the edit.

Requests processed through CIM are called course proposals. Users can initiate three types of course proposals in CIM: Propose New, Edit, or Deactivate. Additionally, users may delete course proposals that are no longer relevant (Shred a Course Proposal).
Propose New

1) To propose a new course that has not existed before, click the Propose New Course button.
2) Complete and submit the New Course Proposal form. For information on the fields on the form, please see the section The Course Proposal Form.

Edit (Revise)

Editing allows users to change the details of existing courses. This includes changes to subjects and catalog numbers.
1) **Search** for the course to be edited.
2) Select the **Edit Course** button to initiate a course proposal.
3) Complete and submit the **Course Proposal** form. For information on the fields on the form, please see the section **The Course Proposal Form**.

### Deactivate

Deactivation occurs when a course is moved from the active status to an inactive status and removed from the University Catalog. Deactivated courses still exist in CIM and the ConnectCarolina catalog but will not appear to students as courses that may potentially be offered. A subject code and catalog number combination may not be reused for a different course if the course which most recently used it is in active or inactive status. After five years in the inactive status, courses are moved to the archived status and their subject code and catalog number combination may be reused.
1) Search for the course to deactivate and select it in the box.
2) Click the Deactivate button to initiate a course proposal.
3) Select a term for the deactivation to be effective. Deactivations should be effective for Fall terms.
4) Enter a Justification for the inactivation.
5) Click the Start Workflow button to submit the request.
Shred a Course Proposal

If a course proposal is no longer relevant, then some administrative users can shred proposals. Shredding a course proposal deletes it from CIM and allows a user to submit a new course proposal.

CIM does not retain any information from shredded proposals, so users are advised to shred proposals only when necessary. If a course proposal has issues that need to be corrected, users are advised to correct the course proposal or send the proposal back to a previous step to be corrected. Please see the section Rolling Back Course Proposals for information on how to send the course back to a previous step. To shred a proposal:

1. **Search** for the course for which you want to shred the proposal.
2. **Click** the **Shred Proposal** button to initiate the shredding process.

3. **Click** **OK** in the warning box to shred the course proposal.
The CIM Ecosystem shows courses, programs (e.g., majors, minors), and Catalog pages that are related to the course being viewed. The ecosystem is usually the first box in the Proposal Preview section of CIM. The entries in the ecosystem are links that will open that page or proposal in CIM.

**Ecosystem**

The CIM Ecosystem shows courses, programs (e.g., majors, minors), and Catalog pages that are related to the course being viewed. The ecosystem is usually the first box in the Proposal Preview section of CIM. The entries in the ecosystem are links that will open that page or proposal in CIM.

**Viewing:** **MATH 231 : Calculus of Functions of One Variable I**

Also listed as: **MATH 231H**

<table>
<thead>
<tr>
<th>Catalog Pages referencing this course</th>
</tr>
</thead>
<tbody>
<tr>
<td>MATH 231:</td>
</tr>
<tr>
<td>Biology Major, B.S.</td>
</tr>
<tr>
<td>Biology Major, B.S.–Quantitative Biology Track</td>
</tr>
</tbody>
</table>

**Workflow**

CIM allows departments/units to internally manage course proposals. The chart below outlines four workflow options for departments/units. The roles/steps in the orange boxes are optional:

- Student Services Manager(s)
- Curriculum Committee

To request an optional role(s) for your department/unit, or to make changes to the users assigned to a role, please submit a request on the Registrar’s Website.
The submitter of a course proposal can also preview the workflow either before or after submitting the request. The preview function identifies both the roles in workflow and the people/users assigned to those roles.

The Course Proposal Form

1) Refer to the Undergraduate Style Guide and Graduate Style Guide for assistance with proper formatting, including capitalization, abbreviations, etc.
2) The form will automatically capture your name and email as the main contact for the proposal; if you are submitting the proposal on behalf of someone else, click yes at the top and enter that’s person’s information.
3) Fields outlined in red are required.
4) Hover over the for help with that field.
5) Field character limits and auto-formatting of some fields are used to meet University style requirements for the Catalog (see Undergraduate Style Guide and Graduate Style Guide).
6) The form has built-in logic that limits potential errors. For example, if you choose Undergraduate in the Academic Career field, the Course Number field will limit you to course numbers 50-89 and 100-699.
7) **First-year seminars** (undergraduate only) must be numbered between 050-089. Undergraduate proposals with these course numbers will be automatically routed to the First-Year Seminar Office for approval as part of the workflow.

8) **Cross-Listed Courses**: Remember that cross-listed courses cannot be across different careers (e.g., undergraduate courses cannot be cross-listed with law school courses).
   a. When searching for cross-listed courses, you can search for any of course codes and the CIM will retrieve the primary course for editing.
   b. Workflow for proposals of cross-listed courses will include notification to the cross-listed department(s) for review. It is recommended that you notify the department(s) of your proposal in advance.

9) **Honors Courses** (undergraduate only): Select whether this is a non-honors course (Regular), will have a non-honors and honors equivalent, or will be an honors stand-alone course. Honors courses (with a designation of “H”) will be automatically routed to Honors Carolina for approval as part of the proposal’s workflow.

10) Requisites and permission statements must be formatted according to the [Undergraduate Style Guide](#) and [Graduate Style Guide](#).
   a. Course pre- and co-requisites will be enforced upon student registration, unless the appropriate box is checked on the form.
   b. Permission statements may indicate whether special permission is required for enrollment (e.g., “Department Permission Required”) or if the course is restricted to certain cohorts (e.g., “For Majors Only”). While these statements appear in the Catalog text, departments are responsible for setting these restrictions when scheduling the course.

11) Sequenced (courses which must be taken in a specific order) and paired courses (courses for which a student may earn credit for only one of the pair/group) can be indicated by clicking on the green add button.

12) For undergraduate courses, click on the appropriate box if the course fulfills one or more general education requirements.

13) A syllabus (see [Faculty Council Guidelines](#)) must be uploaded to all proposals; additional documents can be uploaded as needed—most file types are accepted.

14) At the bottom of the form, you have three choices:
   a. ![Start Workflow](#) to submit a completed proposal.
   b. ![Save Changes](#) to save the proposal and return to it later.
   c. ![Cancel](#) to cancel the proposal (a copy will not be saved).

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### Reviewing Course Proposals in Workflow

**Approve Pages** allows users who are part of the workflow to edit, rollback, or approve a course proposal. When a proposal is submitted it enters the workflow; each person in the workflow for that proposal will receive an email notification.

### How to Access Approve Pages:
- Use the link in the email message to view the course proposal, or
- Go to [Catalog editing site](#) to view all the course proposals ready for your review.
Similar to the Catalog (CAT) system, the Page Approval window has three main sections:

1) **Pages Pending Approval (upper left):** Use this list to select the course proposal desired to review. The course proposal selected will appear in the Page Review window. Click the **Your Role** drop down menu to select the role you wish to view. When a role is selected, the Pages Pending Approval list will be populated with proposals that required review, editing, or approval from the selected role. Click **Refresh List** to see if new proposals have been added since last visited or if the list doesn’t contain an expected proposal.

2) **Page Info/Status (upper right):** Review basic information and the workflow status of the selected proposal here. Click the various tabs to view different reports. Click **Workflow Status** to review and update the workflow progress.

3) **Page Review (bottom):** Review the selected proposal here, then approve it, edit it, or send it back to a previous review/role in workflow. Review changes made by various editors in the workflow by clicking the **View Changes By** drop down and selecting the editor to review.

**How to Take Action on a Course Proposal:**

- Review content in the **Page Review** window:
  - **View changes made:** Click the [https://registrar.unc.edu/courses/curriculum-inventory-management-cim/by](https://registrar.unc.edu/courses/curriculum-inventory-management-cim/by) drop down menu and select an editor whose changes you wish to review.
    - The selected editor’s changes are shown in red and green markup.
    - Remember that any number of editors can be in a workflow. Each editor reviews or edits content sent from the editor directly before them in the queue. The changes seen here are changes the selected author made compared to the document he/she received.
  - **Hide Changes:** View the document without color coding or markup.

- Choose an action:
  - **Edit the proposal:** Click **Edit** to make changes. This will produce a tool bar at the top of the **Page Review** window. After editing the proposal, approve the proposal to send it to the next step in the workflow.
  - **Rollback the proposal:** Click **Roll Back** to send the proposal back to a previous editor. A prompt will appear to make comments about why the proposal is being rolled back. Make comments in the space provided and click **Roll Back** in the new window.
  - **Approve:** Click **Approve** to send the proposal on to the next step in the workflow.
  - **Leave the proposal for another time:** The proposal may be left for another time. Select another proposal to review or click **Log Out**.

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