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Overview of Curriculum Information Management (CIM)

CourseLeaf Curriculum Information Management (CIM), takes the entire curriculum process online. Similar to CourseLeaf Catalog software (CAT), it is a user-friendly tool to integrate with the University Catalog and ConnectCarolina.

CIM also tracks any changes to the form, such as, edits and comments. The form may also be exported from the CIM page to a PDF or Word document. Once the Departmental Workflow approval process is complete, the Course Proposal form moves to the Registrar/Curriculum step, where the course will be processed and updated onto ConnectCarolina. CourseLeaf Catalog software (CAT) will then update the next University Catalog with the approved ConnectCarolina course data.

Departmental Workflow Options

Departments submit CIM Course Proposals to initiate any new courses or changes to existing courses. All approvers must be assigned to a specific role to have access to CIM or CAT.

Approver Roles currently available in CIM:

- CIM SSM
- CIM CURR CMTE
- CIM Chair
- CIM Dean
- CAT Editor
- CAT Approver

Note: To be assigned as an approver on CIM or CAT click the link below:
To add, remove or update members of your department workflow, complete this form.
Note: The roles/steps in the orange boxes of this chart are optional.

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

You can log on, here, for direct access to the CIM Course Proposal form.

You will also find the link for the CIM Course Proposal form at Office of the University Registrar by choosing Courses from the drop-down menu, and then choosing the Curriculum Inventory Management (CIM) page.

Note: New (non-faculty) staff must fill out the New User Form in order to have access to the CourseLeaf/CIM
Course Codes and Searching for Courses in CIM

A Course Code is the Subject Code + Course Number (e.g., BIOL 101, ECON 721).

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

- Enter the complete Course Code (e.g., BIOL 101).
- Use an asterisk (*) in the search box as a wild card:
  - **BIOL**
    Placing the asterisk at the end of the Subject Code will find everything that begins with BIOL.
  - *BIOL*
    Placing the asterisk at the beginning of the Subject Code will find everything that ends with BIOL.
  - *BIOL*
    Placing an asterisk at beginning and end of Subject Code will find everything that contains BIOL.

Course Inventory Management

Search, edit, add, and deactivate courses.

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with “MATH”, *MATH everything that ends with “MATH”, and *MATH* everything that contains “MATH”. The system searches the Course Code, Title, Workflow step and CIM Status.

Quick Searches provides a list of predefined search categories to use.

**CIM Course Proposals**

CIM Course Proposal options:

- Propose a New Course.
- Edit an existing Course.
- Deactivate an existing Course.

Note: Users can permanently delete Course Proposals by choosing the Shred Proposal option, it is highly recommended that you save the Course Proposal to a pdf or word document before clicking the Shred Proposal button.
Navigating the CIM Course Proposal Page

1. Select the **Propose New Course** button or search for the existing course in the **Search field**.
2. Fill out the form with the required information and/or any edits for the course.
3. Select the **Save Changes** button to save work without submitting proposal to the Workflow process.
4. Select the **Start Workflow** button to begin the course approval Workflow process.

**Note:** A Syllabus must be uploaded to the Course Proposal form in order to start the Workflow process.

Additional Comments

**Note:** (As seen below) If you choose the **Save Changes** button, you will then see the **Edit Course** button in the upper right corner of the form, and “Changes saved but not submitted” in the center of the form.

**New Course Proposal**

Changes saved but not submitted

Viewing: **BIOL 199**

Last edit: 02/11/21 12:35 pm

**Note:** (As seen below) The **In Workflow** popup will appear in the upper right corner of the page once
you’ve selected the Start Workflow button, showing the step the form has moved on to in yellow. Any steps in green, show all the approval steps that have already taken place.

Creating a New Course

The CIM form will always default to your Name, User ID and Email, unless you change the submission question from No to Yes. You will then need to provide the Name, Email, Department, and Title of the person for whom you are creating this form.

1. In the Academic Career field, select the applicable choice from the drop down.
2. In the Course Prefix field, select the applicable choice from the drop down.
3. In the Course Number field, enter the course number that has been assigned to the course.
4. In the Department field, select the applicable choice from the drop down.
5. In the College field, select the applicable choice from the drop down. Most often, once the course number has been entered in its field, the college field auto-populates.
6. In the Cross-Listed Courses field, enter the applicable subject code.
7. In the Honors field select Regular Course, Both regular and honors course, or Honors Only Course.

**Note:** If the course is both a regular and honors course, a pop-up appears. Enter the Course Code and select the OK button for the course code to appear on the form.
8. In the **Course Title** field, enter the applicable course title (this will appear in the catalog and to students in ConnectCarolina).

9. In the **Transcript Title** field, enter the applicable transcript title (this will appear only on the transcript).

10. In the **Course Description** field, enter the applicable Course Description (this appears in the Course Catalog).

   **Note:** Do not include prerequisite/corequisite statements in the **Course Description** field. This information is added to the requisite fields below.

11. In the **Effective Term** field, choose the applicable effective term from the drop-down.

12. In the **Credit Hours** field, enter the amount of credit hours the course allows. For variable credit courses, use the following format: 1-3.

   **Note:** Do not include decimal points when entering credit hours.

13. The **CIP Code** field auto-populates once the course number has been entered into the field.
14. In the **Course Type** field, choose the applicable course type from the drop-down. When Yes is chosen the cumulative field appears and the appropriate number should be entered as shown: 9.00 (for this field using a decimal point and double zeros is appropriate).

15. Select **Yes** or **No** for students to be allowed to take this course more than once, for additional credit.

16. Select **Yes** or **No** for students to be allowed to take this course more than once, within the same term.

17. In the **Prerequisites** field, enter the prerequisite courses using the following format: “BIOL 201, 205, and 321 or 333” (do not add a period at the end of list).

18. In the **Pre-or Co-requisites** field, enter the pre-or-co-requisite courses using the following format: “BIOL 201, 205, and 321 or 333” (do not add a period at the end of list).

19. In the **Corequisites** field, enter the corequisite courses using the following format: “BIOL 201, 205, and 321 or 333” (do not add a period at the end of list).

20. The **Enforced Requisites** field is to be filled out only when pre/co requisites entered are to be enforced by our system. By choosing to enforce requisites the system prohibits students from registering for the course, unless they have met the requirements listed. The information in the enforced requisites field should be identical to what is listed in the pre/corequisites field, except for the addition of the word “Prerequisite, or Prerequisites, or Pre or corequisites,” at the beginning of the requisites (e.g. Prerequisites, BIOL 201, 205, and 321 or 333).

21. Select **Yes** or **No** if the student should be checked for the above requisites.
   - If you want the course to only mention prerequisites but do not want the system to block students from registering for the course, choose **Yes**. Leave the **Enforced Requisites** field empty.
   - If you choose **No**, students will see the prerequisites at the beginning of the course description on the catalog, but students will still be able to register for the course.

**Note:** The form automatically defaults to **Yes**. It is up to the user to leave it as is or change it to **No**.

22. In the **Restriction Statement** field This statement should be very simply written. The statement will appear at the end of the Course Description in the Course Catalog. If it is long
or complex, please move it to the end of the Course Description field. If there is not enough word space available, please edit down the description and/or the Restriction Statement.

| Course Type
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>14.</strong> What type of course is this?</td>
</tr>
<tr>
<td><strong>15.</strong> May students take this course more than once for additional credit (as opposed to repeating for grade improvement only)?</td>
</tr>
<tr>
<td><strong>16.</strong> May students enroll in this course more than once within the same term (e.g., different topics)?</td>
</tr>
<tr>
<td><strong>17.</strong> Prerequisites</td>
</tr>
<tr>
<td><strong>18.</strong> Pre- or Co-requisites</td>
</tr>
<tr>
<td><strong>19.</strong> Corequisites</td>
</tr>
<tr>
<td><strong>20.</strong> Enforced Requisites</td>
</tr>
<tr>
<td><strong>21.</strong> Should students be checked for the above requisites when registering for this course?</td>
</tr>
<tr>
<td><strong>22.</strong> Restriction Statement</td>
</tr>
</tbody>
</table>

23. The **Justification** field must be completed for the form to move onto the next step in Workflow.

24. Sequenced and Paired courses are added by selecting the green button with the cross sign.
   - Select the **College** from the drop-down.
   - Select the **Subject** from the drop-down.
   - Select the course then click **Add Selected** for each course to be added.
   - Click on the **Close** button when finished.
25. In the **Grading Basis**, choose the applicable option from the drop-down.

26. In the **Curriculum Requirements** section, click on as many of the boxes that are applicable for this course. (For IDEAs and Connections Gen Eds, there will be additional boxes and fields to complete for the course to move to the next step in Workflow.

27. In the **Course Documents – General** section, click the **Attach File** button to upload a **Syllabus** of the course. A syllabus must be uploaded for the form to proceed in the Workflow process. The file can be a word or pdf document.

**Note:** When naming the document please use the following format: eg. BIOL_101_Fall2021.
28. In the **Final Assessment** section, choose **Traditional** or **Non-Traditional Final Exam** from the drop-down.

29. In the **Additional Comments** section, enter any relevant information as a record of this proposal and/or for anyone who might need more details in the approval process.
Note: As a course proposal is approved at each step, CIM automatically sends an email to each person in that next step in workflow. The email includes a link to the proposal form, that link disappears/is no longer active once the form has been approved by any member of the approval team.

Creating Honors Courses

There are three ways to create an Honors course:

1. Add an Honors version to an existing non-honors course.
2. Create a new course with both a non-Honors and an Honors version.
3. Create a new stand-alone Honors course.

Create a new course to include an Honors equivalent course

Creating an honors equivalent course should only be done if the department plans to offer the Honors version of the regular course in the upcoming year; otherwise, create a new stand-alone non-honors course only.

1. Select Propose New Course.
2. For the Honors question, select Both regular and honors course.
3. In the Honors field, click Add... then in the Honors Course Codes pop-up, select the same subject and enter the same course number with an H at the end.
4. In the **Effective Term** field, enter the term code for the semester the course is available.
5. Click **Attach File** to add a syllabus for the course.
6. Select **Save Changes** to preview and save for further editing.
7. Select **Start Workflow** to submit.

**Additional Comments**

**Note:** The phrase “Honors version available” does not need to be entered at the end of the course description; this information will automatically display in the next edition of the Catalog.

### Create new stand-alone Honors course

Creating a stand-alone honors course should only be done if the department never plans to offer a non-Honors version of the course.

1. In the **Course Prefix** field, select the course subject.
2. In the **Course Number** field, enter the course number and add an H to the end of the course number.
3. In the **Honors** field, select **Honors Only Course**.

4. In the **Effective Term** field, enter the term code for the semester the course is available.
5. Click **Attach File** to add a syllabus for the course.
6. Select **Save Changes** to preview and save for further editing.
7. Select **Start Workflow** to submit.

**Note:** Honors courses (with a designation of “H”) will automatically route to Honors Carolina for approval as part of the proposal’s workflow.

### Add an Honors version to a non-honors course that already exists

1. In the **Search** field, enter the non-Honors course and click **Search**.
2. Select **Edit Course**.
3. In the **Honors** field, select **Both regular and honors course**.

   ![Options for Honors](image)

4. In the **Effective Term** field, enter the term code for the semester the course is available.
5. **Select Save Changes** to preview and save for further editing.
6. **Select Start Workflow** to submit.

### Submit Cross-Listed Course Requests in CIM

#### Proposing a New Cross-Listed Course
1. Select **Propose New Course**. This will be Course A, the sponsor.
2. For the **Cross-Listed Courses** field, enter the subject code and number for Course B (the non-sponsor).
3. Enter the effective date.
4. Attach a syllabus.
5. **Select Save Changes** to preview.
6. **Select Start Workflow** to submit.

**Note:** Workflow for this new course (Course A) will also include the chair/dean for the non-sponsoring department (Course B). All parties must approve the course form for it to progress to college level workflow.

#### Adding a Cross-List to an Existing Course
1. Search for the existing course (Course A, the sponsor).
2. **Select Edit Course**.
3. For the **Cross-Listed Courses** field, enter the subject code and number for the new cross-listed Course B (the non-sponsor).
4. Enter the effective date.
5. **Select Save Changes** to preview.
6. **Select Start Workflow** to submit.

**Note:** Workflow for Course A will be amended to include the chair/dean for the non-sponsoring department (Course B). All parties must approve the course form for it to progress to college level workflow.

#### Adding Multiple Cross-Lists to a Course

Whether you are proposing a new cross-listed course or adding cross-lists to an existing course, you can enter up to three additional cross-lists using the **Cross-Listed Courses** field. To do so, simply continue to click **Add...** and enter the subject code and number for each new course in the cross-list. Each new course will appear on the CIM form.
Note: For each new course, the chair/dean of that department will be added to the CIM approval workflow.

Changing the Sponsoring Unit of an Existing Cross-List

1. To change the sponsor for an existing cross-listed course, search for the sponsor (Course A) and select Edit Course.
2. Under the Cross-Listed Courses field, select Make Primary... next to one of the existing non-sponsor courses. This will make that course the sponsor.
3. Enter the effective date.
4. Select Save Changes to preview.
5. Select Start Workflow to submit.

Note: If making additional changes to an existing course such as adding new Gen Eds or changing the credit hours, please make sure to attach an updated syllabus.

Deactivating an Existing Cross-List

1. To deactivate an existing cross-list, search for the sponsor course and select Edit Course.
2. Under the Cross-Listed Courses field select Remove... next the course you wish to remove from the cross-list.
3. Enter the effective date.
4. Select Save Changes to preview.
5. Select Start Workflow to submit.
6. The sponsor course now becomes a stand-alone course.

Deactivating All Courses in a Cross-List

1. To deactivate all courses in an existing cross-list, search for the sponsor course (Course A)
2. Select the Deactivate button to deactivate the sponsor course. This automatically deactivates all existing cross-listed courses as well.
3. Enter the effective date.
4. Select Save Changes to preview.
5. Select Start Workflow to submit.

When all sponsored courses are deactivated, only the chair/dean of the sponsor course department is included in workflow.

Preview a Course Proposal Workflow

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

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those roles. On the CIM course search page, click on **Preview Workflow**.

**Note:** As a course proposal is approved at each step, CIM automatically sends an email to each person in that next step in workflow. The email includes a link to the proposal form, that link disappears/is no longer active once the form has been approved by any member of the approval team.

### Rolling Back A Course Proposal

A course proposal can be sent back to any previous (approver) step in Workflow. Email notifications are sent to all members of the chosen Workflow step, stating the Course Proposal has been rolled back to that step in Workflow.

**Note:** Once any other approver in your group approves a course the link is no longer live, unless there are multiple courses waiting to be approved.

### Deactivate a Course Proposal

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 on ConnectCarolina-Catalog, while the course does not appear on the university catalog site.

1. In the **Search** field, enter the course code and click search.
2. Select the course and click the **Deactivate** button (a popup appears).
3. In the **End Term** field, choose the appropriate end term from the drop down.
4. In the **Justification for this request** field, write the reasoning for deactivating.
5. Select **Start Workflow** to submit the Course Proposal request.

**Note:** The Deactivate button only appears when the form is out of the In Workflow process (when it is an editable state). The **Edit Course** button will also be visible when form is out of the In Workflow process.

**Note:** All Deactivations should be effective for Fall terms.

**Note:** After five years in the Inactive status, courses are moved to the Archived status. The Subject Code and Catalog Number are then available to utilize for a new course.
Course Inventory Management

Search, edit, add, and deactivate courses.

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with "MATH", *MATH everything that ends with "MATH", and *MATH* everything that contains "MATH". The system searches the Course Code, Title, Workflow step and CIM Status.

Quick Searches provides a list of predefined search categories to use.

Viewing: **PSYC 509 : Applied Behavioral Analysis**

Deactivating: **SOWO 6131**

End Term: 

Justification for this request:

Start Workflow

Office of the University Registrar
Shred a Course Proposal

Shredding a Course Proposal deletes it from CIM and allows the user to submit a new course proposal. It is highly recommended that you save the course proposal to a pdf or word document before selecting the **Shred Proposal** button.

CIM does not retain any information from shredded proposals, so users are advised to shred proposals only when necessary. If there is anything that needs to be corrected, users are advised to make the correction before saving the Course Proposal to a pdf.

1. **In the Search field**, enter the course code and click search.
2. **Select Export to PDF or Word**, to save the Course Proposal to a pdf or word document.
3. **Select Shred Proposal**.
4. **Select OK** in the warning box to shred the Course Proposal.

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**Course Inventory Management**

Search, edit, add, and deactivate courses.

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with “MATH”, *MATH everything that ends with “MATH”, and *MATH* everything that contains “MATH”. The system searches the Course Code, Title, Workflow step and CIM Status. Quick Searches provides a list of predefined search categories to use.

**Changes saved but not submitted**

Are you sure you want to shred this proposal? This action cannot be undone.
Creating an Agenda of Proposals to Review/Approve

An Agenda allows users to create a list of all the course proposals at any single step in the workflow process. For example, if the department has a Curriculum Committee that needs to review the proposals, the chair (or student services manager) can create a list of all the proposals for the department; depending on which method is chosen, the list can have embedded hyperlinks to the actual proposal form or show what changes have been made. There are two ways to create a list (agenda) of all the courses for the curriculum committee to review.

**Note:** It is recommended that both formats are created to determine which best fits the department’s needs.

### Agenda Report Option 1

Shows courses for review with their **old** and **new** values (what’s been changed).

2. Log in with your **ONYEN/password**.
3. In the **Approval Role** field, select the appropriate approver role.
4. In the **Output Format** field, select type of export you want (HTML, PDF, Excel).
5. Hit **Run Report**.

### Agenda Report Option 2

Allows the user to select which form fields to include with the option of creating live links to the proposals.

2. Login with **ONYEN/Password**.
3. Select **In Workflow**.
4. Under **Workflow Filter** select the appropriate approver role.
5. Under **Additional Fields** select which items from the form you want to include on the report. Hit **Run Report** (at top, green button).

6. The report will appear below on that window. Then hit **Export**.
7. Select **Export** and then select **Excel**.
8. The file will open with the course and title as live links. However, these links won’t work in Excel (a Microsoft bug).

9. To make the links work:
   a. Save the Excel file as an HTML document, by clicking Save As and then choose Webpage.
   b. If that does not create workable links, then go to where you have saved the file.
   c. Rename the file with the ending of .html such as Agenda.html.
   d. Reopen the document in any browser and the links should work.
Helpful Tips

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 person’s information.

3) Fields outlined in red are required.

4) Hover over the help bubbles (?) 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 graduate or professional 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.
   c. Guidelines and policies for cross-listed courses are listed in University Policy Memorandum #11.

9) Honors Courses (Undergraduate only): Select whether course is a non-Honors course (regular), will have a non-Honors and an 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. A syllabus (see Faculty Council Guidelines) must be uploaded to all proposals; additional documents can be uploaded as needed—most file types are accepted.