

## Approving a Course in CIM – Quick Guide

### Overview

The steps involved in approving a new course include:

1. Receiving a notification via email that there is a course waiting for your approval.
2. Accessing CIM
3. Logging into CIM
4. Selecting the course to be reviewed
5. Reviewing the course proposal
6. Approving the course proposal

### Step 1: Notification

The CIM software automatically sends an email message to the next approver in the workflow. You will receive an email notice that looks something like this:

| FROM           | SUBJECT                       | RECEIVED              | SIZE |
|----------------|-------------------------------|-----------------------|------|
| Catalog Editor | [CIM Courses] Review Request: | Fri 11/7/2014 9:03 AM | 9 KB |

Committee members will receive an FYI notice. This provides a link to the proposal for review and comment, but no approval is required. The Chair of the committee is the approver.

### Step 2: Accessing CIM

In most email systems you can simply click the link in the message to open a browser and access the CIM approve page. However, if your email system defaults to plain text, the link will not be active. In this situation you will need to copy the link and paste it into the address field of a browser.

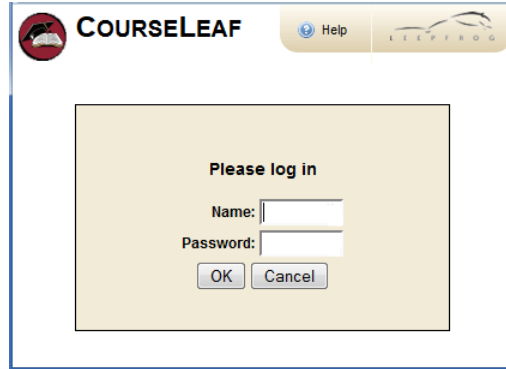
When you open the CourseLeaf approve page in a browser, you will see an access screen like the following:



The CourseLeaf page is shown in the background, but you cannot access the page until you log in. **Click the circular icon** in the 'Please Log In' box (highlighted in yellow in the image above) to log in.

**Step 3: Logging Into CIM**

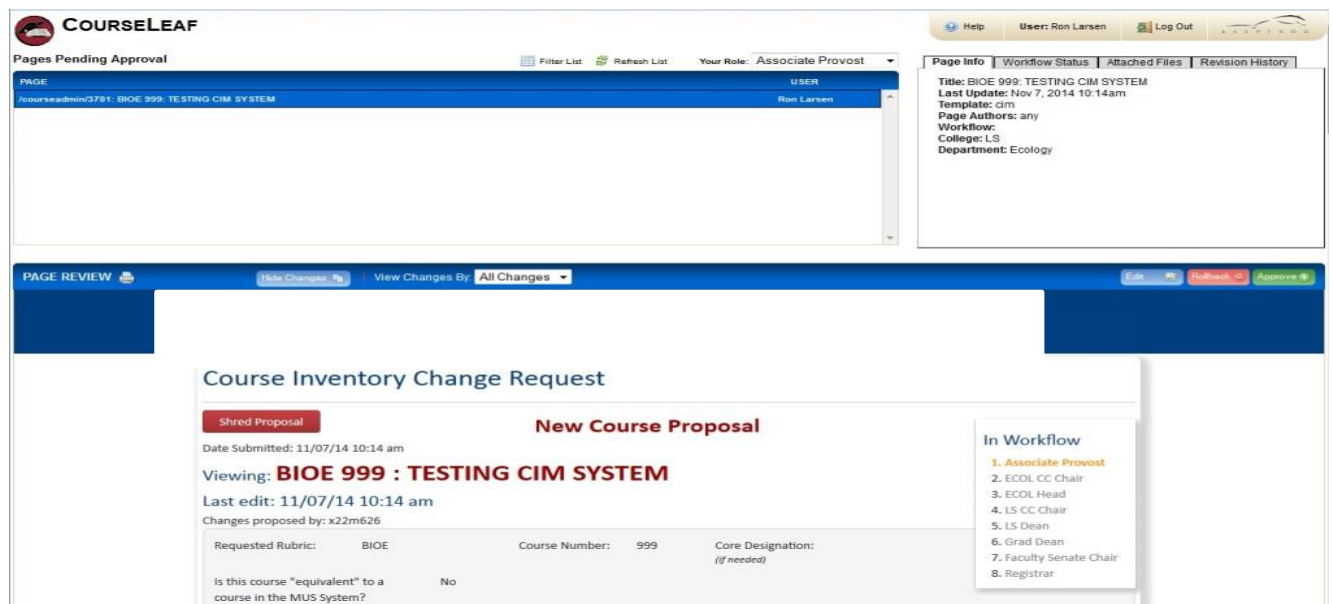
A log in dialog box will open (shown in the next figure). Use your NCSU Unity ID and password to access CourseLeaf.



*Note: We have attempted to grant CourseLeaf access to all faculty at NCSU. If you cannot access CourseLeaf, contact your college liaison and [courseleaf-help@ncsu.edu](mailto:courseleaf-help@ncsu.edu).*

**Step 4: Selecting the Course to be Reviewed/Approved**

After logging into CIM you will see the approve page, shown below.



Since this is a large page, we'll look at several pieces individually.

## List of Courses Awaiting Your Review/Approval

When you access CIM it will take you to a page showing the courses awaiting your approval. Notice on the left top the “Your Role” field [This example shows a test course awaiting approval by the Associate Provost.] Since one person may have multiple roles in the workflow, please be sure to select *Your Role* to find actions waiting for your approval/review at that workflow step.



### Step 5: Reviewing Course Proposals

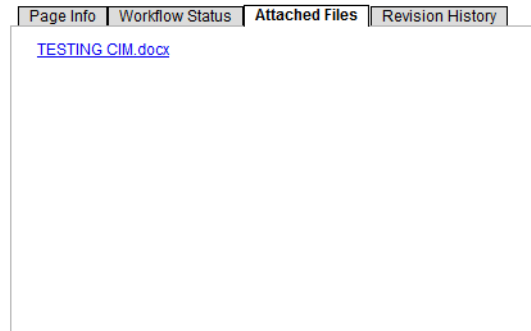
Detailed information on the highlighted course is shown at the bottom of the page, as a preview. [Since there is only one course listed in this example, it is also highlighted.] Only a small fraction of the course information is shown in the figure below.



In many cases all of the information that you will want to see is provided in this preview. Attached materials such as the syllabus are not available in the preview. You can access attached materials from the CIM approve page using the Attached Files tab at the top right of the page.

### Accessing Attached Files

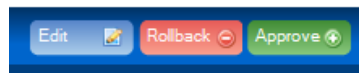
The box at the top, right of the CIM approve page is a multi-paneled information display (shown in the following figure). One of the tabs provides access to all files attached to the course proposal. There should always be a syllabus attached to a new course proposal and for certain course edits. Other additional information can be uploaded if necessary.



In this example, a syllabus file named *TESTING CIM.docx* has been attached. If you click on the file name the file will be downloaded and opened on your computer.

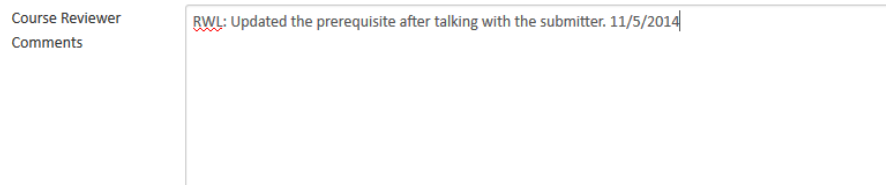
## Editing Course Proposals

In most cases approvers will not need to edit the course proposal, but it is possible. Use the Edit button underneath the information display to open the course proposal in a new window for editing.



*Note: There is a known bug in the CIM system that causes the new edit window to open behind the approve page. It may appear that nothing happens when you click the Edit button – but look behind the approve page.*

From the edit window you can access attached files. There is also a text field at the bottom of the form for reviewer's comments.



This field is used to document any changes made to the course proposal as it moves through the review process, or to add comments that you want other approvers to see.

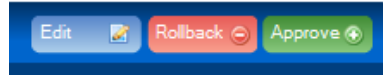
Use the Save Changes button to save any changes you have made to the proposal, including any added comments.



*Note: The Rollback button (shown above) sends the proposal all the way back to the original submitter. The NCSU review process allows approvers to contact the submitter to discuss potential proposal updates, and then allows approvers to add information to the proposal (usually in the Reviewer Comments box) without sending the proposal back to the beginning of the workflow. This may be a preferred option since **rolling back a proposal will require routing through the entire workflow again.***

## Step 6: Approving Course Proposals

Once you are OK with the course proposal, you approve the proposal simply by clicking the Approve button on the CIM approve page.



This completes your review process and moves the proposal on to the next approver in the workflow.

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If you have questions about CIM, please email [courseleaf-help@ncsu.edu](mailto:courseleaf-help@ncsu.edu).