# CIM Course Archiving Guidelines

courseleaf-help@ncsu.edu

## OVERVIEW OF COURSE PROCESSING

All course offerings at NC State follow a process for creating, editing, dropping, adding/removing as a general education course, and being included/removed in a curriculum.

This process is managed by the Office of Undergraduate Courses and Curriculum for undergraduate courses and by the Graduate School for graduate courses. The former process, using printed course action forms and manual routing of the action, has been replaced by an online process using an electronic course action form and workflow. The management system is called CourseLeaf Curriculum Inventory Management (CIM pronounced "Kim").

The Student Information System (SIS – PeopleSoft), managed by Registration and Records, manages the course data entry into SIS for courses approved by the faculty governance committees (UCCC and CUE). This information is found in the course catalog listing and scheduling screens. For courses in the course inventory system (CIM), course detail in the SIS record is pulled in to populate the associated fields on the CIM form.

CourseLeaf CIM maintains a historical record of all actions submitted and approved through the workflow including all attachments (syllabi, etc.) as well as consult responses and comments from reviewers and approvers.

The goal of the CourseLeaf Course Inventory Management system is to streamline course processing, providing efficiency and transparency to the course management and approval of course actions.

For the initial implementation of this system, course records in CIM have been populated only with course data as it exists in the PeopleSoft/SIS database where there is a corresponding field on the CIM course form. Additional course detail must be manually entered to complete the record. Departments interested in building a complete record of the courses in CIM are provided with the guidelines attached.

If any questions about course processing using CourseLeaf, please contact a CIM team member via the courseleaf-help@ncsu.edu email.

## Approaches to Building a Complete Course Record in CourseLeaf CIM

Processing course actions using the new CIM course action form requires specific course information to be populated in the course record in order to submit into the approval workflow. With the initial implementation, these course records in CIM are incomplete.

**There are two approaches to building a complete course record in CIM:**

1. **As Needed** - Only enter missing course data in CIM when needing to submit a course action/revision. Course is submitted into workflow for approval routing.

2. **In Advance** - Enter missing course data for all active courses in CIM in advance to build the course archive. Course is not submitted into workflow for approval routing but will be approved for archive by the Graduate or Undergraduate office.

***Which approach is recommended?***

Colleges and departments determine how best to manage their course records in the Course Inventory Management system either by taking the advanced approach to building their course archive or only when a course edit is needed.

The recommended approach is to have a complete course record built in advance for all courses in CIM. A complete record will provide efficiency in processing future edits to the course and make clearer the edits being made. Departments can also easily access the course record in CIM to view the most recent course record.

**Note:** *If major edits to a course are needed*, build the archive to reflect the course as is currently and once archive is approved, the record can then be edited to reflect major changes and submitted into approval workflow for full routing.

## Building the Course Archive in Advance

For those departments that would like to take the advanced approach and establish a completed course record in CIM, the following should be considered in planning:

1. ***Who will be the designated person entering course data into CIM for each record?***
   - *All faculty and staff have access using existing unity ID and password. For assistance with login and access, contact courseleaf-help@ncsu.edu.*

2. ***Determine the internal review process once a course record is complete.***
   - *How should the completer of the archive record coordinate internally once the record is complete?*
   - *Who will need to review the record internally for accuracy and completeness before notifying the Graduate or Undergraduate office that the record is ready for archive?*

3. ***For cross-listed or jointly administered courses**, the additional departments/colleges should be included in consult for archiving the record.*
   - *The consult notification on the form is active only when in workflow. When building the archive record, consultation should be handled via email and noted on the course record in the comments field.*

4. ***What other documentation may be needed, besides the syllabus,** for the person to enter the course content into the record?*

   - *Departments are asked to enter their course detail into CIM as it is currently being taught and to include as an attachment the most recent, complete syllabus.*
   - *Most of the fields on the CIM Course Form can be completed using the course syllabus. A **list of the course form fields is attached** for reference.*

5. ***If multiple sections of a course**, which syllabus best reflects the course information? Use the syllabus that best reflects the course.*

6. *Identify any **courses to be dropped** and submit into workflow via the Drop Course button on the course record.*
   - *Dropping a course does not require entering all the course detail that is missing; there is a separate drop form.*

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## Getting Started!

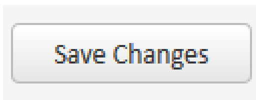
- **ACCESSING THE COURSE RECORD**
  - Access CourseLeaf CIM at https://next-catalog.ncsu.edu/courseadmin/
  - Search for the specific course or courses using search options (ex: ES 100 or ES 1** or as a stream ES 100, ES 200, ES 300).
  - The course record(s) will appear below the search results window.

- **EDITING THE COURSE RECORD**
  - Click the green  on the course record.
  - **PeopleSoft (SIS) Fields on form** *(populated from SIS/PS record)*
    - Upon initial view of a course record in CIM, ***certain fields have been populated*** with course catalog data pulled directly from *PeopleSoft/SIS*. These fields are shaded/highlighted on the course record.
    - ***Review this data and if incorrect or missing, edit the field*** to reflect the correct course detail
    - Enter a statement in the ***Justification*** field on the form to provide context for the change to any of these fields.
    - ***Any edits to the content in the PeopleSoft/SIS synced fields***, in most instances, is considered a 'major' action requiring full approval workflow routing. The Graduate and Undergraduate office will review any edits to these fields to determine appropriate routing.
    - Some ***Major course edits*** include changes to:
      - Credit or contact hours
      - Course prefix/title/number
      - Grading method
      - Prereqs, coreqs, and restrictive statements
      - GEP category designation
      - Catalog description, if reflects change in content.

## ENTERING MISSING COURSE CONTENT and SAVING THE RECORD

- Enter applicable course content into course form fields.
  Fields outlined in red are required fields and must be completed.

- Use the **Save Changes button** at the bottom of the course record to save changes as needed when completing the record; *however* **each save will require re-selecting "Edit Course" button** to continue editing.

***Select*** 

***to save changes along the way and when complete.***

**Note:** If the *Save and Submit* button is selected, the course will enter into the approval workflow. If this button is selected by accident, please contact courseleaf-help@ncsu.edu.

**Notes about specific course form fields**:

- Consult blue ***Help*** bubbles for field detail. 
- Instructor Name - List the ***Instructor Of Record*** (IOR)(Faculty member responsible for the course). Classroom instructors are listed at the section level.
- Course topics, Text, and Evaluation Methods - For multiple section courses, this may mean that the course information entered will primarily reflect the way only one instructor handles the course.
- Effective Date - Select current term or next term as the effective date.
- Enrollment Data - Use an average enrollment if multiple section course.
- Course Length - enter 16 weeks (includes 15 week and final exam).
- Course contact hours are to be based on 15 weeks in calculation.
- Is course required or an elective in a curriculum? If information is not readily available, enter "see audit" in each field and then select "Elective" from drop down.

## UPLOADING ATTACHMENTS - SYLLABUS

- Upload the syllabus as an attachment in both PDF and Word format but either format is acceptable if both are not available.

## WHAT TO DO AFTER COMPLETING THE COURSE RECORD

1. **Select a statement to be added to the Additional Comments Field**

After saving all changes using the ***Save Changes*** button at the bottom of the course record, please copy and paste/enter the applicable statement below into the Additional Comments field. Please add any additional information or detail in the comments section as needed.

- If the course record does not include any edits to a **PeopleSoft field**, no major changes, please enter the following statement in the *Additional Comments* field.

  "***Course update for archive only, no edit to PeopleSoft field***."

- If an edit was made to a PeopleSoft/SIS field, enter the following statement in the *Additional Comments* field.

  "***Course update for archive with edit to PeopleSoft field***"

2. **Additional Comments - Departmental/College review**

For a completed record requiring review/approval internally before submission to the Graduate or Undergraduate office, notify the departmental and/or college contacts, as needed, to confirm edited record is complete and accurate.

Any additional departments/colleges for **cross-listed or jointly administered courses** should be included in consult for building the archive of the record. The person responsible for the review should add a statement into the Additional Comments field on the course form to reflect the levels of review. Insert the reviewer name and unity ID as applicable.

***Example statements include:***

"Reviewed by _____"
"Department Approved - John Smith, Dept Head 6/13/15"
"Course content was provided by ______ and entered by____. Department Head/Name reviewed 6/13/15"
"Consulted Departments/College contacts include ___________________"
"Submitted by _________"

## SAVING THE COURSE RECORD AND EMAIL NOTIFICATION

- Once the complete record has been entered, saved (*Save Changes*) and reviewed as needed by the department(s)/college(s), the department responsible for the courses sends an email notification to courseleaf-help@ncsu.edu indicating the following:
    - **In the Subject Line** of the email, enter "Archive Request" and indicate the course prefixes being archived. Ex: "**Archive Request - ECE Courses**"
    - **In the Body of the email or as an attachment** (Excel/Word), list the courses (prefix/number) ready for archive.
      Ex: "The following courses have been saved in CIM for archive approval"
    - Please add to the email any other information to help in review.
- Once the CIM Admin Team (Graduate/Undergraduate Office) verifies the course record and approves for archiving, the department/college will be notified and an entry will be made into the comments field reflecting this.
- If the record will require routing through the standard workflow for approval, the department will be notified to submit the action into the workflow.

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## DROPPING A COURSE RECORD


If a course is being dropped, select the **Drop Course** button on the course record to open a drop form. The course record does not need to be complete to drop a course.

NC STATE Courses and Curricula

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**Notes about CourseLeaf <u>Course Inventory Management</u> (CIM):**

- All records are on a secure server and only accessible by faculty and staff having unity login.
- Course data entered is not being utilized for any purpose other than to build the course inventory for efficiency in processing.
- CIM is not for archiving term syllabi.
- Course content entered does not directly update the PeopleSoft system.

***TIPS:***

- *More than one person can edit a record allowing for collaboration but if a record is being edited at the same time by different users, the first person to save their edits wins.*

- *Use the "*Save Changes*" button frequently as needed to save changes being entered. Save will not submit the action into workflow, just saves the changes being made and can come back later to edit or someone else can pull up the course and review the edits and also make changes and Save.*

- *If a current course record is to be revised, the preferred method would be to enter all course detail for the course as is and archive as per the instructions here. Once archived with current course information, edits can then be made to the course to be submitted into workflow for approval routing. This way the record will reflect the course changes more clearly and capture the course record prior to the change.*

- *To find the workflow routing for a course, click on the Preview Workflow on the course record. If any edits needed to workflow setup, send an email to courseleaf-help@ncsu.edu.*

- *<u>Help:</u>*

  *Use the **Help Bubble** next to each field for more detail about content.* 
  

  *Use the Help icon located on the top right of the course record page* 
  
  *that provides a link to information about the page and CIM Course tutorials prepared by CourseLeaf.*