Approving a Course in CIM – Quick Guide

Online Approval Process
Course approval is now an online process using an online course action form (https://next-catalog.ncsu.edu/courseadmin/ and http://oucc.ncsu.edu/courseleaf). The CourseLeaf Curriculum Inventory Management (CIM) system is used for creating, editing or dropping a course.

Workflow Routing
The approval routing is now handled electronically using a workflow system. Workflow roles have been assigned to replicate the departmental and college course approval process.

Attention Approvers - https://next-catalog.ncsu.edu/courseleaf/approve/
If you have received an email as an approver, you are assigned to a workflow role and action is required on your part or the workflow will be stalled. If you are not the correct person for this role, please send an email to courseleaf-help@ncsu.edu.

For each role you are assigned, you will receive an email notification with a link to the course proposal in the CIM system. You can view the course detail just as if it were the hard copy course action form just in electronic format and includes the syllabus and other attachments as applicable. Note: Sometimes there may be more than one action notification sent in an email stream so please check related emails or go to the course approval home page at https://next-catalog.ncsu.edu/courseleaf/approve/ and select from the “Your Role” drop down as applicable.

The steps involved in approving a course action include:
Email notification > Accessing CIM > Logging into CIM > Selecting the course to be reviewed > Reviewing the course proposal>Taking action on the proposal (Approve, Edit, Rollback)

Email Notification
The CIM software automatically sends an email message to the next approver in the workflow. You will receive an email notice with your assigned role referenced in the subject line.

Committee members or others identified in the workflow to be informed will receive an FYI notice. This provides a link to the proposal for review and comment, but no approval is required.

Accessing CIM
Access the approval page in CIM by clicking the link received in the email message to open a browser (use Google or Firefox browser). If necessary, you will need to copy the link and paste it into the address field of a browser or go to https://next-catalog.ncsu.edu/courseleaf/approve/.

When you open the CourseLeaf approve page in a browser, you will see an access screen. 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 to log in.
Logging Into CIM

A login dialog box will open and 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.

Selecting the Course to be Reviewed/Approved

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

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 right top the “Your Role” field listing roles in the workflow. Your role should come up automatically when using the link received in the email notification. Please note that since one person may have multiple roles in the workflow, please be sure to select the appropriate role to find actions waiting for your approval/review at that workflow step.

Reviewing Course Proposals

Click on the course and scroll down the page to see the course action detail and attachments. In many cases all of the information that you will want to see is provided in this preview. Attached materials such as the syllabus and supporting documentation are accessible from the course action.

Approvers may Edit, Rollback (deny) or Approve the course proposals. Each of these options will provide approvers with the opportunity to add comments. Click the appropriate option, and add a comment as necessary. The form will be routed to its next stop in workflow.
**Editing Course Proposals** (Click the Blue Edit button; Click *Save Changes* button after editing)

In most cases, approvers will not need to edit the course proposal but the option is available. Click on the blue Edit button and the editable form will appear. From this edit window you can make edits, access attached files, and add comments in the comments text field at the bottom of the form. Once edits are complete, use the *Save Changes* button to save any changes/comments you have made to the proposal. Then **Click the Approve button** if ready to move to the next step in the workflow.

*For minor edits needed*, it is best to make the adjustment at the current step rather than rolling back to a prior step in the workflow. Rolling back the proposal to a prior step requires routing again through the subsequent workflow steps. Contacting via email to resolve a question and editing the form as needed will move the action more quickly through the workflow.

*For major edits or for edits requiring repeated review through workflow* should be rolled back to the appropriate workflow step. Use the Edit button underneath the information display to open the course proposal in a new window for editing.

**Rollback of a Course Proposal** (Click the Red Rollback button)

The Rollback button sends the proposal to a specific step/role in the workflow. For instance, the rollback could be to the Department Head step or all the way back to the original submitter for resubmission. Note that approvers may prefer to contact the submitter via email to discuss questions, concerns, edits needed and the approver can add comments and edit the proposal to inform the review and approval. This may be a preferred option since **rolling back a proposal will require routing again through subsequent workflow**. After clicking the rollback button a pop up window will allow selection of step to rollback to with comment.

**Approving Course Proposals** (Click the Green Approve button)

Once your review is complete and all attachments and comments are included as needed, click the Approve button to move the proposal on to the next approver in the workflow. For a preview of the next steps in the workflow look to the right side of the course proposal for the list. The green workflow steps are completed, yellow in process, and gray steps remain.

**Help:**

Click on the Help button (blue) on the top right of the approver page in CIM for help and instructions about the approve pages and options. If you have questions about CIM, please email courseleaf-help@ncsu.edu for assistance and the oucc.ncsu.edu/courseleaf website for information. The College Liaison in the Dean’s office is also a contact familiar with this process.