

CIM – COURSE INVENTORY MANAGEMENT

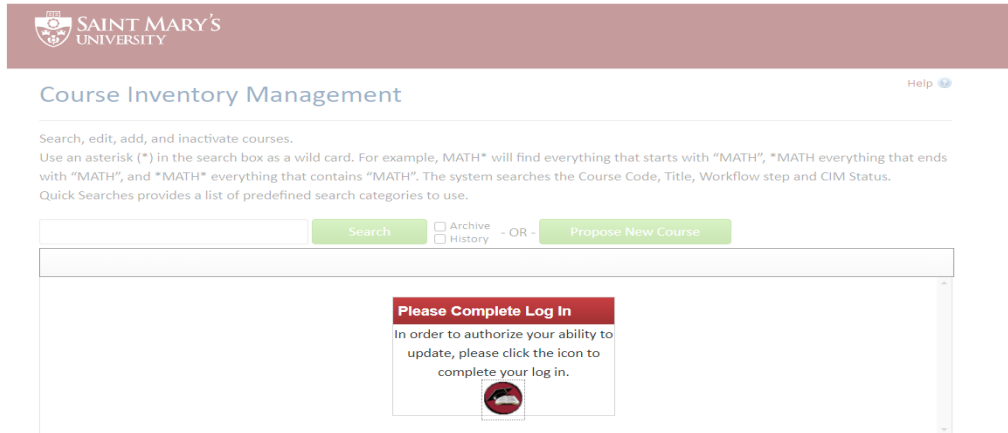
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ACCESSING AND LOGGING INTO CIM

Using the appropriate internet browser (Firefox, Chrome and Safari), go to the **CourseLeaf landing page** on the SMU website (once Live), <https://www.smu.ca/courseleaf-access/>. Here you will be able to access CIM- Course Inventory Management page.

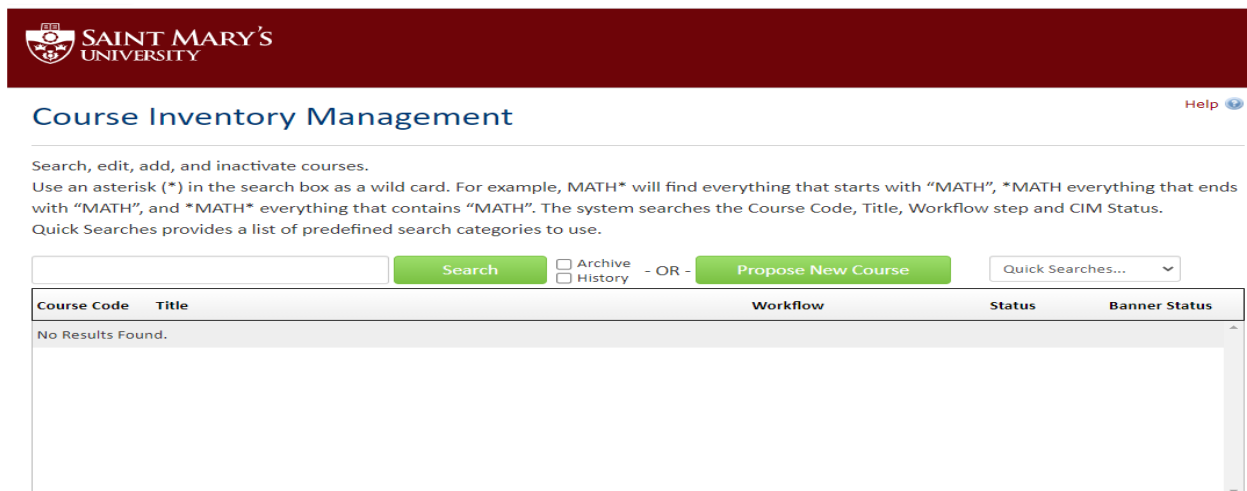
Once you click the link, you will see an access screen like the following:



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 to log in as indicated in the above image.

Use your **# and password** (the same ID and password you use to log onto Banner) to access CourseLeaf.

SEARCHING FOR A SPECIFIC COURSE





- In the search field located on the top left of the CIM window type the course code, a space and course number (E.g. ENGL 1205) and click the **Search** button to bring up the course.
- To perform a wildcard search, enter an asterisk (*) before or after your text and click **Search**. Eg: ENGL* will bring up multiple courses containing the text ENGL.
- The **Quick Searches** drop down menu allows you to search **Edited, New (Added), Archived** courses.
- Courses can also be sorted by clicking the headings **Course Code, Title, Workflow** or **Status**. You can then scroll down and select a course from the list.

VIEWING A COURSE

Features:

- The Course Ecosystem allows you to see courses and programs that would be affected if a proposal is made for the course you are viewing
- Tracked changes with red/green markup
- Last approved and last edited dates provided
- Workflow status can be viewed if applicable
- Deleted courses can be viewed but no further action can be taken
- Past proposals are archived under History


Help 

Course Inventory Management

Search, edit, add, and inactivate 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.

Archive - OR - History

Course Code	Title	Workflow	Status	Banner Status
ANTH 1202	Intro to Soci-Cultural Anthropol			A
ANTH 1271	Intro to Archaeology			A
ANTH 1280	Intro to Biological Anthro			A
ANTH 1290	Intro to Language & Society			A
ANTH 2100	Human Evolution & Adaptation			A
ANTH 2125	Primate Diversity			A

Viewing: **ANTH 1202 : Intro to Soci-Cultural Anthropol** [Preview Workflow](#)


Catalog Pages referencing this course

- [Anthropology](#)
- [Anthropology.\(ANTH\)](#)
- [Asian Studies](#)
- [Environmental Studies](#)
- [International Development St.\(IDST\)](#)

HOW TO EDIT A COURSE

The steps involved in editing a course include:

1. Launch internet – Firefox, Chrome and Safari preferred.
2. Go to the CourseLeaf landing page- <https://www.smu.ca/courseleaf-access/>
3. Access CIM - <https://smu-ca-next.courseleaf.com/courseadmin>
4. Log into CIM – Enter SMU s# and password
5. Search for specific course – Search options, i.e. PSYC 1200 or PSYC*
6. Select the course to be edited from the results window.
7. Select the green **Edit Course** button.
8. Complete the relevant edits on the course form.
9. Complete the required fields highlighted in red.
10. Click **Save & Submit**. Course then becomes ‘active’ in the workflow.
11. Form moves through workflow steps for approval and approver are notified via email.



Editing: **ANTH 1202: Intro to Soci-Cultural Anthrop**

Subject Code	<input type="text" value="ANTH - Anthropology"/>	Proposed Course Number	<input type="text" value="1202"/>	<input type="button" value="Course Numbers in Use"/>
Department	<input type="text" value="Anthropology"/>			
Faculty	<input type="text" value="Faculty of Arts"/>			
Academic Level	<input type="text" value="Undergraduate"/>			
Credit Hours	<input type="text" value="3"/>			
Long Title	<input type="text" value="Introducing Socio-Cultural Anthropology"/>			
Abbreviated Title	<input type="text" value="Intro to Soci-Cultural Anthrop"/> <small>0 characters remaining</small>			
Effective Term	<input type="text" value="Select..."/>			
Crosslisted with	Add...			
Description	<input type="text" value="An introduction to the cultures and social systems of people from around the world. Topics include economics, politics, kinship, family, and religion, as well as the expressive aspects of culture such as the arts, myth, and ritual."/>			
Prerequisites	<input type="text"/>			
Notes	<input type="text"/>			
Academic Year	<input type="text" value="Select..."/>			
Expected enrolment	<input type="text"/>			
Field Course: Length of field study (if applicable) and location(s) field work is done	<input type="text"/>			
Why are you proposing new or editing an existing course?	<input type="text"/>			

HOW TO PROPOSE A NEW COURSE

***If you have both course and program proposals to submit, it is recommended that you submit all course proposals prior to submitting program proposals.

- Click the **Propose New Course** button to bring up the new course proposal template. Complete all the required fields. Help bubbles are located as a guide for completing certain fields.
- After completing the form, click **Save & Submit** to start Workflow.



Course Inventory Management

Help

Search, edit, add, and inactivate courses.

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* Archive History - OR -

1/22/24, 9:03 AM

New Record

New Course Proposal

Subject Code	<input type="text" value="Select..."/>	Proposed Course Number	<input type="text"/>
Department	<input type="text" value="Select Department..."/>		
Faculty	<input type="text" value="Select Faculty..."/>		
Academic Level	<input type="text" value="Select..."/>		
Credit Hours	<input type="text"/>		
Long Title	<input type="text"/>		
Abbreviated Title	<input type="text"/>		
	30 characters remaining		
Effective Calendar	<input type="text" value="Select..."/>		
Crosslisted with	Add...		

Description

Prerequisites

Notes

Expected enrolment	<input type="text"/>
Field Course: Length of field study (if applicable) and location(s) field work is done	<input type="text"/>
Is this required in an academic program?	<input type="radio"/> Yes <input type="radio"/> No

https://smu-ca-next.courseleaf.com/courseleaf/courseleaf.cgi?page=courseadmin/index.html&step=editrecord&cmd=new&_id=1705028597308

1/3

Do you have recommended library offerings? Yes No

Does this proposal require an EIT review? If the course requires special facilities or technical resources (including regularly scheduled sessions in a computer lab), then there must be assurance that adequate resources exist.

Yes No

Why are you proposing a new or editing an existing course?

Library Review

An assessment of Library resources must be completed by the Library and submitted with the course proposal to the Department and Faculty. It does not need to be included in the submission to the Curriculum Committee.

A librarian will evaluate the resource requirements of the course and may initiate the purchase of additional material using the departmental allocation. Please allow two weeks for the Library's assessment.

Uploaded Files:

Files To Be Uploaded:

Resources adequate Yes No

HOW TO ARCHIVE/INACTIVATE A COURSE

- Select the course that you wish to archive or inactivate from the results window.

Archive/Inactivate
Export to PDF
Export to Word

Edit Course
[Preview Workflow](#)

Viewing: **ANTH 1202 : Intro to Soci-Cultural Anthrop**

Catalog Pages referencing this course

- [Anthropology \(ANTH\)](#)
- [Health, Wellness & Sport Soc \(HWSS\)](#)
- [Linguistics \(LING\)](#)

Programs

- [ANTH: Anthropology](#)

Subject Code	ANTH - Anthropology	Proposed Course Number	1202
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- Select the red button at the top of the course form **Archive/Inactivate**.
- The course archive/inactivate form will populate.
- Complete the required fields.

- Once the form is completed, select one of the following options:
 - **Cancel** to not save any changes.
 - **Start Workflow** to submit the proposal.

Note: there is not a “save” option for course deletion/inactivation if you are not an Administrator. The proposal to delete is either cancelled upon exiting, or submitted to the next approver.

HOW TO REACTIVATE AN ARCHIVED COURSE FOR E

- Select the course you wish to reactivate.

- Select **Reactivate** from the CIM window. The course form will populate.
- Complete the required fields and click **Submit & Save** to start Workflow.
- If you do not see the **Reactivate** button, please contact support.

FREQUENTLY ASKED QUESTIONS

CAN I MODIFY A COURSE TITLE?

- Course titles can be modified, if the course description, subject, etc. is the same for the course.
- Course titles should not be changed to affect the creation of an entirely new course (i.e. recycling an old course to make a new course).
- If you are modifying the **short title only** please contact sarah.maclean@smu.ca or shelley.clarke-raftus@smu.ca to update Banner.

CAN I CHANGE THE CREDIT HOURS OF AN EXISTING COURSE?

- The credit value for existing courses **cannot** be changed.
- To create the same course with a different weight, perform the following two create steps:
 - inactivate the existing version of the course, and
 - add the new version of the course, with different credit weight and new number.

WHAT IF I NO LONGER WANT TO SUBMIT MY PROPOSAL?

- Contact CourseLeaf support person (shelley.clarke-raftus@smu.ca) from Saint Mary's University to remove.

WHY ARE THERE RED BOXES AROUND SOME COURSES WITH "COURSE NOT FOUND"?

- Red boxes indicate the course in the calendar does not match what is in Banner. When a red box displays around a course, that can mean one of three things: the course code was either typed incorrectly, the course is no longer offered, or the course exists but isn't updated in Banner.

HOW DO I ADD A CROSS-LISTING IN CIM?

Cross-listing new courses

- When creating a new proposal that needs to be cross listed with another new course, decide which should serve as the primary. At minimum the subject code and number fields would need to be filled. Click **Add** next to **Crosslisted with**. Entering that cross-list will automatically create the proposal for that particular course and be searchable in CIM. You also can change which course is primary and create two (or more) new courses to cross list.

Cross-listing new and existing courses

- If you wish to add a cross-listing to an existing course, then the existing course should serve as the primary course. Therefore, click on the existing course form first to add the new code since that didn't previously exist. If the new course form is chosen as the primary, CIM will not allow adding an existing course as a cross-list and will trigger an alert that says *Coursecode not unique*.

Removing a cross-list

- When breaking a cross-list, click the **Remove link** from the form of the primary course. This removal inactivates the secondary course.

CAN I EDIT A COURSE/PROGRAM THAT IS IN WORKFLOW?

- No, once a course/program has been edited/proposed by a user, the ability of another user to edit that same course/program is shut down. The edit button is gone and the workflow steps are indicated.

HOW DOES ROLLBACK WORK?

If you are an approver and wish to roll the proposal back to a previous workflow step for further modification, press the red "rollback" button in the **Approve** view, and select the person or role to whom it is to be rolled back, including an explanation.

What happens when the CourseLeaf system is closed for the academic year, but a proposal already is in workflow and will need to be rolled back because it requires further edits?

After the system has been closed, the farthest step back that a rollback can be sent and still allow editing is the Chair/Coordinator workflow step. If you roll it back all the way to the original submitter, it will have fallen out of workflow and cannot be edited or resubmitted.

If you are the original submitter and need to make a further edit after the proposal has been submitted into workflow, your Chair/Coordinator can edit it directly in the **Approve** screen, using the blue **Edit** button. If the proposal has moved past the Chair/Coordinator step, you can contact the individual for the role/step at which the proposal is resting and ask them to roll it back to your Chair/Coordinator.