



# CURRICULUM INFORMATION MANAGEMENT (CIM) APPROVER MANUAL

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Office of Curriculum Services  
[www.kent.edu/provost/curriculum](http://www.kent.edu/provost/curriculum)

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# Curriculum Information Management (CIM) Definitions

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## Approve

The action to approve an item, which will send the item to the next step in the workflow.

## Approver

A user who has been given the capability to edit, rollback or approve a proposal in the workflow, and can access this functionality from the Proposal Approval site.

## Approver parties

Faculty initiator →Dept/School →College →Provost →EPC →Faculty Senate →BOT →ODHE →HLC

## Catalog

The official document of record for undergraduate and graduate programs, courses, academic policies and special programs.

## CIM

Curriculum Inventory Management – the CourseLeaf software used by the University to update, review and approve Kent State's academic courses, programs and policies.

## Course Bubble

A window that pops up on the screen when a user clicks on a course; these bubbles display information about a course as entered in Banner, including description, prerequisites, schedule type, grade mode, attributes.

## Course Code

The course subject code and course number.

## Course Inventory

The course inventory is populated by a regular extract from Banner.

## CourseLeaf

The software for Kent State's University Catalog and curriculum management process.

## Course List

Course list is a type of table in the CIM software used to create program requirements. Courses in a Course List are linked to Banner. A course list provides information in a pre-formatted table structure. Course lists are primarily used to display Program Requirements (Majors, minors, certificates, etc.)

## Curriculum Guidelines

Provides faculty members, academic administrators and curriculum committee members with a blueprint to develop and revise academic policies, majors, concentrations, minors, certificates, courses and organizational changes and agreements with curricular implications and includes specific information about EPC and the approval process. It can be found on the Curriculum services website, [www.kent.edu/provost/curriculum](http://www.kent.edu/provost/curriculum).



## *Curriculum Information Management (CIM) Definitions continued*

### **Curriculum Services, Office of**

Under the auspices of the provost, the Office of Curriculum Services is responsible for analyzing, facilitating and monitoring proposed changes, and implementing those changes as approved by governing bodies. The office staff reviews and implements approximately 1,500 curricular changes annually.

### **Ecosystem**

A set of relationships between courses, programs, and other systems that are displayed as links in curricular proposals in CIM.

### **EPC**

The Educational Policies Council (EPC) is a subcommittee of the Faculty Senate charged with the long-range academic planning and overall curriculum and policy guidelines for Kent State University. The EPC has oversight for curriculum issues, programs and policy proposals, library policies and facilities.

### **Plan of Study Grid**

Called a "roadmap" in the University Catalog, the grid depicts a program's curriculum in an ideal semester-by-semester sequence for students to graduate in a timely manner.

### **Preview Workflow**

Allows you to see what the workflow approval path would look like if the proposal was submitted at that moment. The approval path may change depending on the values entered in the form.

### **Red Boxes**

Red boxes that appear around fields in the proposal forms are required to be completed before a proposal is submitted. A red box will also appear around a course that is not found in Banner because the course is no longer active, or the course has been entered incorrectly.

### **Rollback**

An action that can be taken by an approver in the workflow to send a proposed revision in CIM back to a previous approver or to the originator in the workflow. Rollback does not undo any changes that have been made, it only reassigns access to a previous step in the workflow.

## Proposal Approval Site Overview

The Proposal Approval Site allows administrators or faculty users who are part of the approval process to review, edit, rollback, or approve a page.

**COURSELEAF** Help User: kentuser Log Out

1 Pages Pending Approval Filter List Refresh List Your Role: ACCT Chair

PAGE	USER
/programadmin/2: Accounting - B.B.A.	kentadmin
/courseadmin/2: ACCT 23021: FOR TESTING INTRODUCTION TO MANAGERIAL ACCOUNTING	kentadmin
/courseadmin/3: ACCT 33000: FUNDAMENTAL TAX PROCEDURES	kentuser
/courseadmin/4: ACCT 43001: INTERMEDIATE FINANCIAL ACCOUNTING I	kentuser

3 Page Info Workflow Status Attached Files Revision History

Title: Accounting - B.B.A.  
 Last Update: Jul 24, 2019 4:54pm  
 Template: cim  
 Page Authors: any  
 Workflow:  
 College: BU  
 Department: Department of Accounting

4 PAGE REVIEW Hide Changes View Changes By: All Changes Edit Rollback Approve

5 6 7 8 9

- Pages Pending Approval:** Use this list to select a proposal desired to review. The proposal selected will appear under the Page Review blue bar (see #4).
- Your Role:** Select a role to see the pending proposals that need approval.
- Page Info/Status:** Review basic proposal information and the workflow status of the selected proposal here. Click the various tabs to view different reports.
  - Click Workflow Status to review workflow progress
  - Click Attached Files to view any files that have been attached to the proposal
  - Click Revision History to view past workflow approvals
- Page Review:** The selected proposal appears below the page review blue bar.
- Hide Changes:** Click to hide any changes made on the proposal.
- View Changes By:** Review changes made by various editors in the proposal by clicking on the drop-down and select the editor to review.
- Edit:** Click to open the proposal form and make edits as needed.
- Rollback:** Click to send the proposal back to a previous approver.
- Approve:** Click to approve the proposal.

Proposal Approval Site Overview continued

The screenshot displays the 'Course Change Request' interface. At the top, there are navigation buttons: 'PAGE REVIEW', 'Hide Changes', 'View Changes By: All Changes', 'Edit', 'Rollback', and 'Approve'. The main title is 'Course Change Request'. Below the title are two buttons: 'Export to PDF' and 'Export to Word'. A green 'Add Comment' button is located on the right side. The interface is annotated with numbered callouts (10-17) pointing to various elements. Callout 10 points to the 'Date Submitted' field. Callout 11 points to the 'Viewing' field, which displays 'ACCT 33000 : FUNDAMENTAL TAX PROCEDURES'. Callout 12 points to the 'Last edit' field. Callout 13 points to the 'Changes proposed by' field. Callout 14 points to a box listing 'Catalog Pages referencing this course' with links to 'Accounting.(ACCT)' and 'Department of Accounting'. Callout 15 points to a 'Reviewer' table with three entries. Callout 16 points to the 'Add Comment' button. Callout 17 points to an 'In Workflow' list showing the approval path: 1. ACCT Chair, 2. BU Curriculum Committee Chair - Undergraduate, 3. BU Dean - For UG courses, 4. Provost, 5. Curriculum Services, 6. Banner. Below the workflow list is an 'Approval Path' section showing a single step: 1. 08/05/19 11:17 am kentuser: Approved for ACCT Chair.

**10. Date Submitted:** The date that the proposal was submitted by the initiator.

**11. Viewing:** Title of the proposal that has been selected.

**12. Last approved/last edited:** The date that the proposal was last approved/last edited.

**13. Changes proposed by:** The name of the user that submitted the change.

**14. Ecosystem:** The CIM Ecosystem shows courses, programs and catalog pages that are related to the proposal being viewed, and catalog pages that house the program being reviewed.

- **Catalog Pages referencing this course:** These pages will generally be course description pages, department pages that have course lists, or any time a course is mentioned in the catalog outside of CIM.
- **Programs referencing this course:** These are CIM programs that reference this course in some way, usually in the program description and program requirements.
- **Other Courses referencing this course:** These are courses that name the course being viewed in some way, it may include prerequisites, corequisites, or catalog description.
- **Catalog Pages referencing this program:** These are the pages where the CIM Program Proposal resides in the catalog.


**15. Reviewer Comments:** Comments will appear here when a reviewer or approver leaves a comment on the proposal.

**16. Add Comment:** Click to leave a comment on the proposal.


**17. In Workflow:** Approval flow for this proposal.

## How to Review a Curricular Proposal

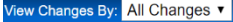

**STEP 1:** Navigate to the CIM Proposal Approval site by following the link in the automated email and/or by choosing your role from dropdown.


- If you use the link from the automated email, your role will be pre-selected for you
- Click the *Refresh List* button  Refresh List to see if new proposals have been added since your last visit or if the list doesn't contain an expected proposal

**STEP 2:** Scroll through the Pages Pending Approval list and select the proposal to review.

- When a page is selected, the reports and workflow status window and the Page Review window will be populated with information.
- To filter your proposals, click the Filter button  Filter List then enter text to filter. You may filter any text in the URL or title that shows in the Pages Pending Approval window. To reset the filter to show all, click Filter, then click OK with the filter field blank.

**STEP 3:** Review proposal under the Page Review blue bar 

- The changes made are shown in red and green: red for deleted text, green for new text.
- View changes by : Click the drop-down menu and select an editor whose changes you wish to review. The changes seen here are the changes that the selected author made.
- Hide Changes : View the document without color-coding or markup.

**STEP 4:** Choose an action on the proposal. 


- One of three actions may be taken after reviewing the proposal; edit, rollback, or approve.

## How to Edit a Curricular Proposal

**STEP 1:** Navigate to the CIM Proposal Approval site by following the link in the automated email and/or by choosing your role from dropdown.


- If you use the link from the automated email, your role will be pre-selected for you

**STEP 2:** Scroll through the Pages Pending Approval list and select the proposal to review.


**STEP 3:** Click the blue Edit button  to make changes to the proposal. This will open the proposal form so you may make the necessary changes.

**STEP 4:** After editing the proposal, approve the proposal to send it to the next step in the workflow.

## How to Approve a Curricular Proposal

- STEP 1:** Navigate to the CIM Proposal Approval site by following the link in the automated email and/or by choosing your role from dropdown.
- If you use the link from the automated email, your role will be pre-selected for you
- STEP 2:** Scroll through the Pages Pending Approval list and select the proposal to approve.
- STEP 3:** Click the green Approve button  to send the page on to the next step in the workflow.

## How to Rollback a Curricular Proposal

- STEP 1:** Navigate to the CIM Proposal Approval site by following the link in the automated email and/or by choosing your role from dropdown.
- If you use the link from the automated email, your role will be pre-selected for you
- STEP 2:** Scroll through the Pages Pending Approval list and select the proposal to rollback.
- STEP 3:** Click the red Rollback button  to send the page back to a previous approver.
- A prompt will appear (*see figure 1*) to make comments about why the page is being rolled back. Make comments in the space provided and click Rollback in the new window.
  - Comments are displayed on the proposal preview with a timestamp and username. These comments are viewable by all users and cannot be edited after they are posted.

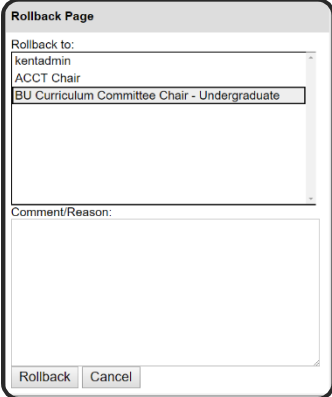



Figure: 1

## How to Add Comment


*Option One: when using the green Add Comment button*

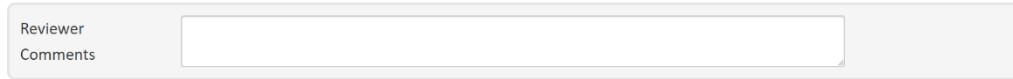
- STEP 1:** Navigate to the CIM Proposal Approval site by following the link in the email and or by choosing your role from dropdown.
- STEP 2:** Choose the proposal to make a comment.
- STEP 3:** Click the green Add Comment button  and enter the comment




## How to Add Comment continued

*Option Two: when using the Review Comments field*

**STEP 1:** Click the blue Edit button  and add comments to the *Review Comments* field, then click the Save button.



**STEP 2:** Click the green Approve button,  to move the proposal forward in workflow. (If you intend to Rollback the proposal, you will be asked to make a comment in the Rollback action.)

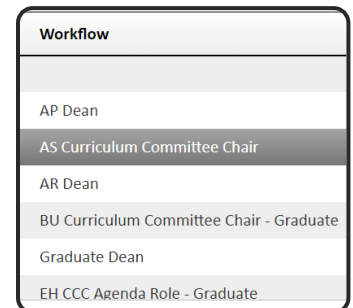
Note: Comments are displayed on the proposal preview with a timestamp and username. These comments are viewable by all users and cannot be edited after they are posted.

## How to View the Approval Process (Workflow)

If you have already approved a proposal and wish to see where the proposal is in the approval flow, you can search for the proposal on the Course or Program Management site.

*Option One:*

- STEP 1:** Navigate to the Program Management site.
- STEP 2:** Search for the program by entering the program name in the search box.
- STEP 3:** In the search results, look at the *Workflow* column (see *figure 2*) to view the step/role.

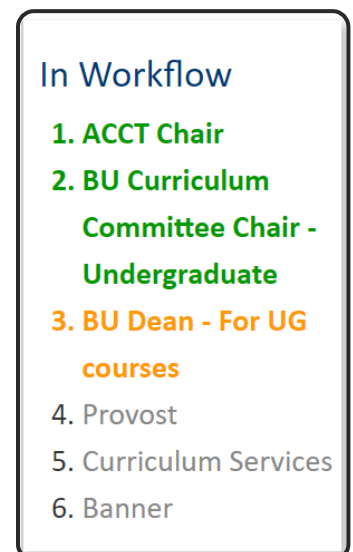


Workflow
AP Dean
AS Curriculum Committee Chair
AR Dean
BU Curriculum Committee Chair - Graduate
Graduate Dean
EH CCC Azenda Role - Graduate

Figure: 2

*Option Two:*

- STEP 1:** Navigate to the Program Management Site
- STEP 2:** Click on the program name and the proposal will appear underneath the search results
- STEP 3:** Navigate to the *In Workflow* box (see *figure 3*) at the right of the page. Steps that have already been approved will be in green, who is currently reviewing the proposal will be in orange and pending step will be in gray.



In Workflow
1. ACCT Chair
2. BU Curriculum Committee Chair - Undergraduate
3. BU Dean - For UG courses
4. Provost
5. Curriculum Services
6. Banner

Figure: 3

# How to Search for a Proposal

## Course Management

**KENT STATE UNIVERSITY** You are logged in as kentuser

### Course Management

This system enables you to search, revise, establish and inactivate courses. Use an asterisk (\*) in the search box as a wild card. For example, entering MATH\* will find everything that starts with "MATH"; entering \*MATH will find everything that ends with "MATH"; and entering \*MATH\* will find everything that contains "MATH." The system searches course subject, course title, workflow step and status (e.g., new). Quick Searches provides a list of predefined search categories to use.

1  2 Search  History - OR - Propose New Course 3 Quick Searches... ▼

Course Code	Title	4 Workflow	5 Status
ACCT 23021	FOR TESTING INTRODUCTION TO MANAGERIAL ACCOUNTING	BU Dean - For UG cou...	Revised
ACCT 33000	FUNDAMENTAL TAX PROCEDURES	ACCT Chair	Revised
ACCT 43001	INTERMEDIATE FINANCIAL ACCOUNTING I	ACCT Chair	Revised
ACTT 11000	ACCOUNTING I: FINANCIAL	Banner	Revised
AERN 32200	STATICS AND MORE	AERO Chair	Revised
ARCH 10101	DESIGN STUDIO I	AE CCC Agenda Role	Revised
ARCH 58998	RESEARCH	AE CCC Agenda Role	Revised

**1. Search Box:** There are several different ways to search for a course. Keep in mind that an asterisk (\*) is a wildcard and can be used at any place within your search terms to stand in for missing information. Searching with only an asterisk will return all courses in CIM.

- Search by entering the course subject and number
  - ENG 11011
- Search by keyword
  - "Physics" will return any course with "Physics" in the title

**2. History Check Box:** By selecting history, the search results will also include previously approved proposals in the search results.  Search  History

- CIM History is a permanent record of the approved course from the last time it went through the curricular approval process. History displays the approval path, workflow steps, roll back comments, and red/green mark up. The history search results only go back to the day CIM was implemented. Only proposals that have been completely approved will show up in the history. History is view only; it cannot be edited.

## *How to Search for a Proposal continued*

### *Course Management continued*

3. **Quick Searches:** The “quick search” dropdown can be used to filter the search box and only show specific proposals based on status.
4. **Workflow:** The workflow column displays the step or role that the proposal is in the approval process.
  - Clicking on the “workflow column” in the search results box will sort the information A-Z or Z-A order.
5. **Status:** The status column shows the proposal type. Clicking on the “status column” in the search results box, will sort the information A-Z or Z-A order.
  - **New:** This status indicates that a new course proposal has been initiated for this course.
  - **Revised:** This status indicates that a revision to an existing course has been submitted to the curricular process.
  - **Inactivated:** This status indicates that a course has been proposed to be made inactive or is currently inactive in Banner.
  - **Blank:** This indicates that the course exists in the Banner, but it is not currently in the CIM proposal process.

## How to Search for a Proposal continued

### Program Management

**KENT STATE UNIVERSITY** You are logged in as jkellog7

## Program Management [Help](#)

This system enables to search, revise, establish and inactivate programs. Use an asterisk (\*) in the search box as a wild card. For example, entering MATH\* will find everything that starts with "MATH"; entering \*MATH will find everything that ends with "MATH"; and entering \*MATH\* will find everything that contains "MATH." The system searches program code, program title, workflow step and status (e.g., new). Quick Searches provides a list of predefined search categories to use.

History - OR -

Program Name	Workflow	Status
Middle Childhood Generalist Social Studies (4-6) Endorsement Preparation - No...		Revised
Mild-to-Moderate Special Education - Minor		
Mild/Moderate Educational Needs Licensure Preparation - Non Degree		Inactivated
Military Leadership Studies - Minor		
Modeling and Animation - Minor		
Moderate/Intensive Educational Needs Licensure Preparation - Non Degree		Inactivated

1. **Search Box:** There are several different ways to search for a program. Keep in mind that an asterisk is a wildcard and can be used at any place within your search terms to stand in for missing information. Searching with only an asterisk will return all courses in CIM.

- Search by entering a program name using the asterisk (\*)
  - Studio Art\*
- Search by keyword plus asterisk (\*)
  - \*art\* will return any program with "art" in the title, **Art History**, **Art Education**, **Earth Science**, **Integrated Language Arts**.

2. **History Check Box:** By selecting history, the search results will also include previously approved proposals in the search results.    History

- CIM History is a permanent record of the approved programs from the last time it went through the curricular approval process. History displays the approval path, workflow steps, roll back comments, and red/green mark up. The history search results only go back to the day CIM was implemented. Only proposals that have been completely approved will show up in the history. History is view only; it cannot be edited.

## *How to Search for a Proposal continued*

### *Program Management continued*

3. **Quick Searches:** The “quick search” dropdown can be used to filter the search box and only show specific proposals based on status.
4. **Workflow:** The workflow column displays the step or role that the proposal is in the approval process.
  - Clicking on the “workflow column” in the search results box will sort the information A-Z or Z-A order.
5. **Status:** The status column shows the proposal type. Clicking on the “status column” in the search results box, will sort the information A-Z or Z-A order.
  - **New:** This status indicates that a new program proposal has been initiated for this course.
  - **Revised:** This status indicates that a revision to an existing program has been submitted to the curricular process.
  - **Inactivated:** This status indicates that a program has been proposed to be made inactive or is currently inactive.
  - **Blank:** This indicates that the program exists, but it is not currently in the CIM proposal process.