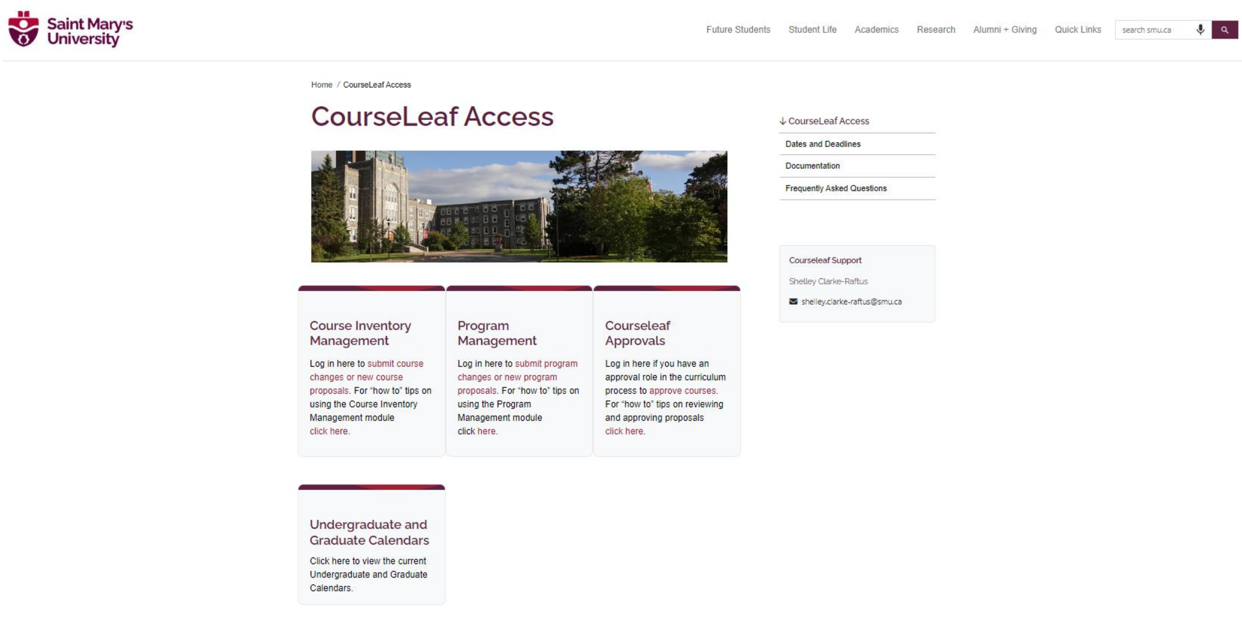
CIM – PROGRAM MANAGEMENT

CONTENTS

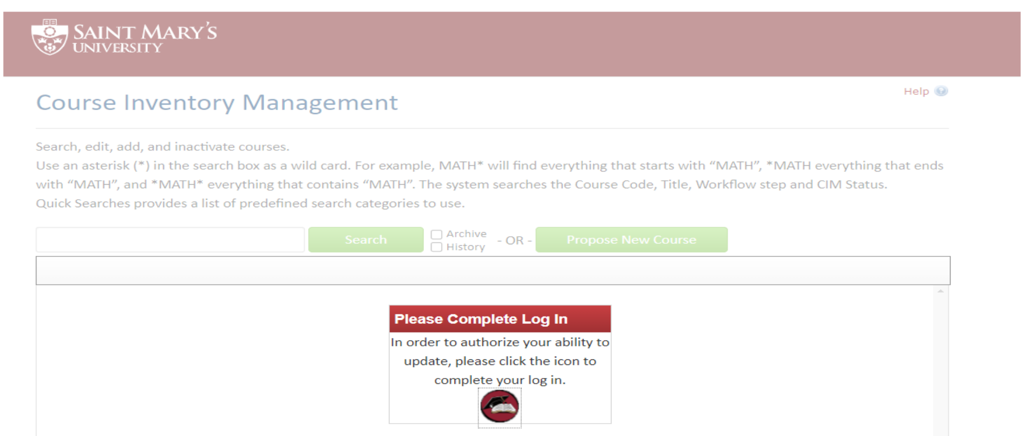
***If you have both course and program proposals to submit, it is recommended that all **course proposals be submitted prior to submitting program proposals**.

ACCESSING CIM AND LOGGING INTO CIM

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



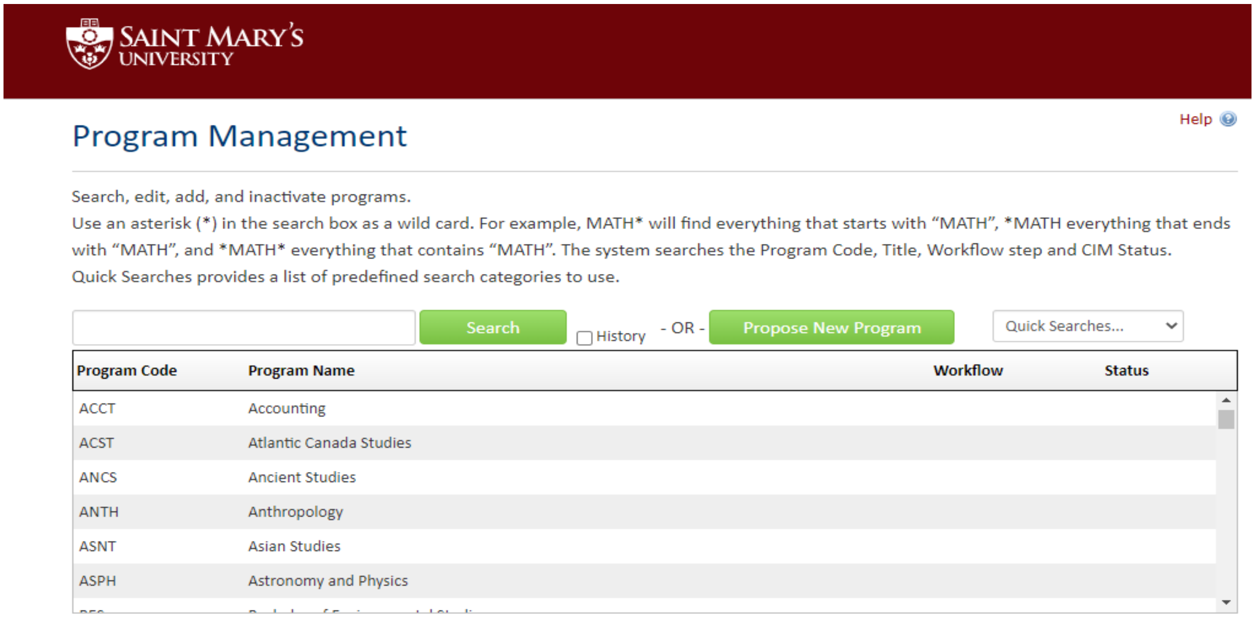
Once you click the link, you will see an access screen like the following:



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.

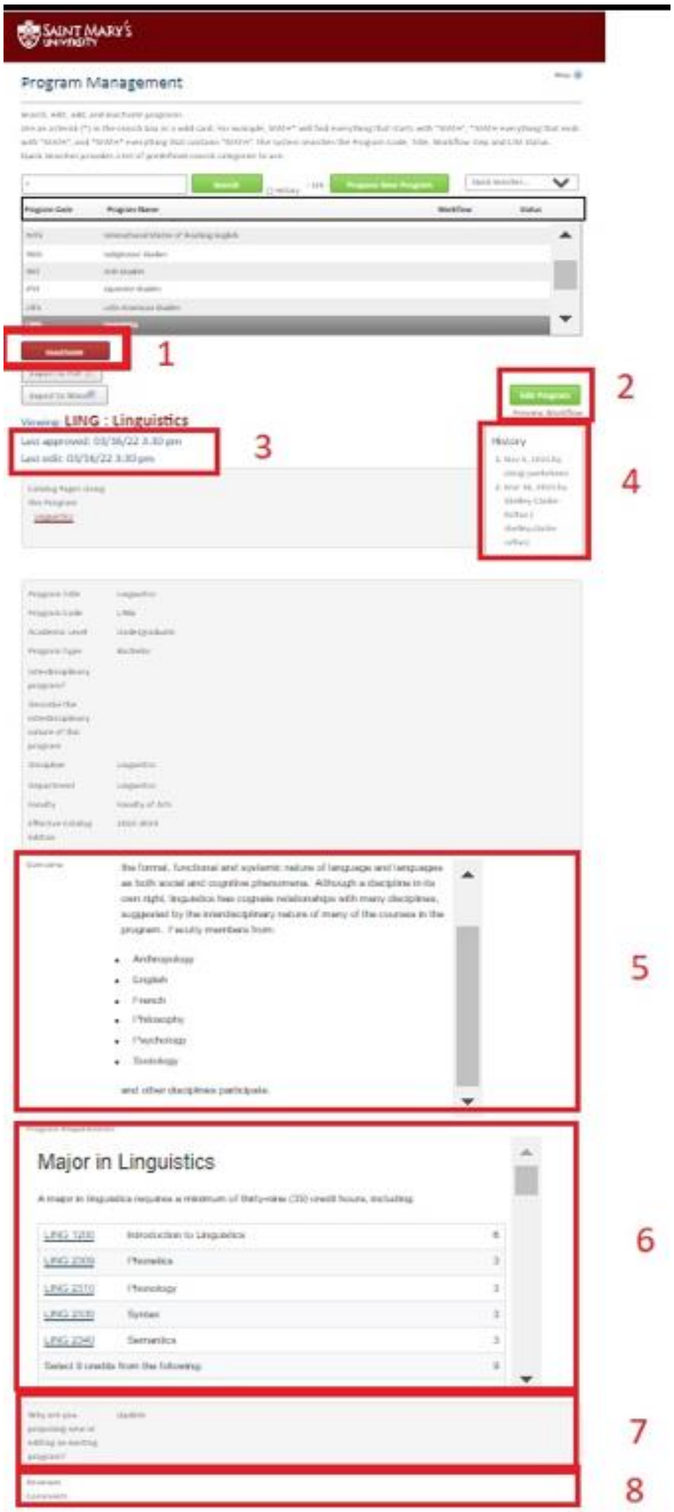
Use your **s# and password** (the same ID and password you use to log onto Banner) to access CourseLeaf.

SEARCHING FOR PROGRAM PROPOSALS



You can go to the **Search** field or scroll down on the right-hand side. You will be able to see the **Workflow** stage (if applicable) and **Status** (if applicable) of the program.

VIEWING A PROGRAM IN CIM



Legend

1 - The button to inactivate a program.

2 - The button to edit the program.

3 - The last time the proposal was approved and edited.

4 - Shows the history of who and when the program was approved and edited.

5 – **Program Overview** as seen in the calendar. Any edits will be seen with red/green mark up.

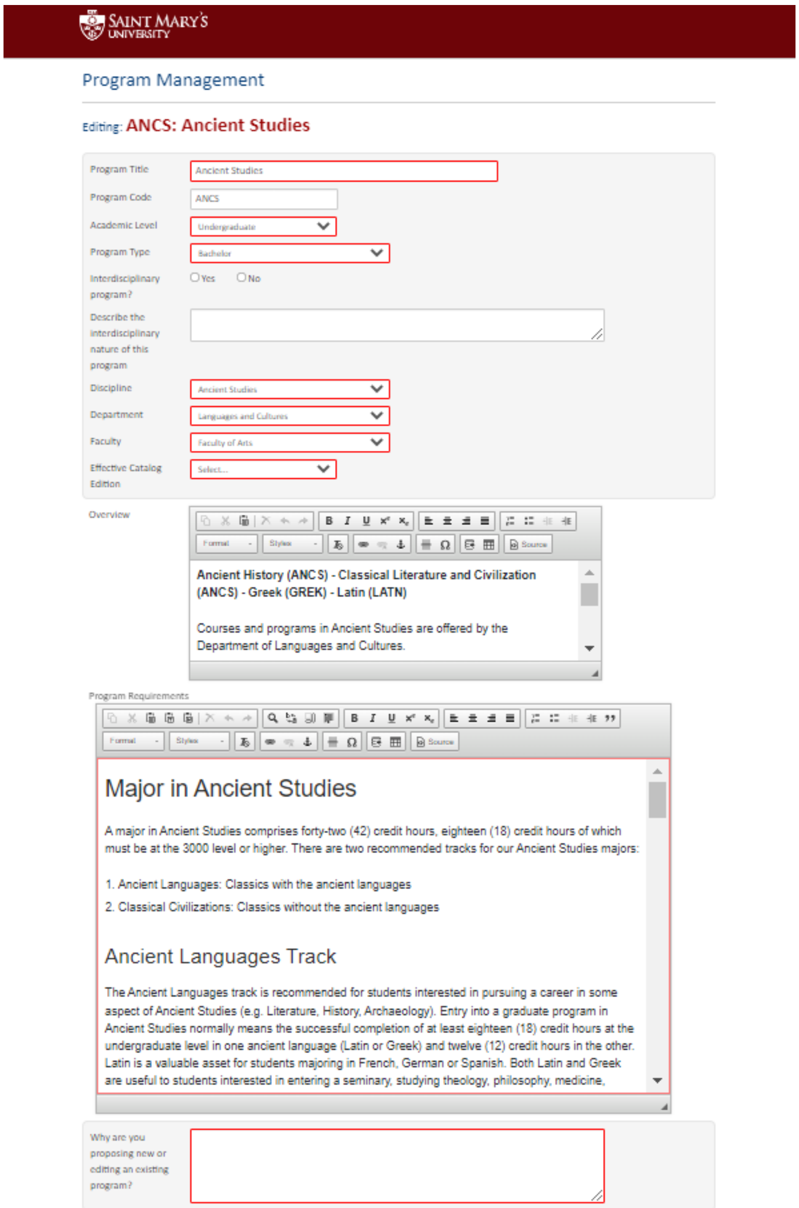
6 – **Program Requirements** as seen in the calendar. Any edits will be seen with red/green mark up or a blue vertical line next to the text if a table was edited.

7 – Reason for the edit or new proposal.

8 – Reviewer Comments. Reasons for why proposal is rolled back would also be seen in this field.

HOW TO PROPOSE AN EDIT TO A PROGRAM

1. Search for the program to edit.
2. Select the program to edit, then click **Edit Program**. Update the required fields. When updating tables please contact support (shelley.clarke-raftus@smu.ca) for help if needed.



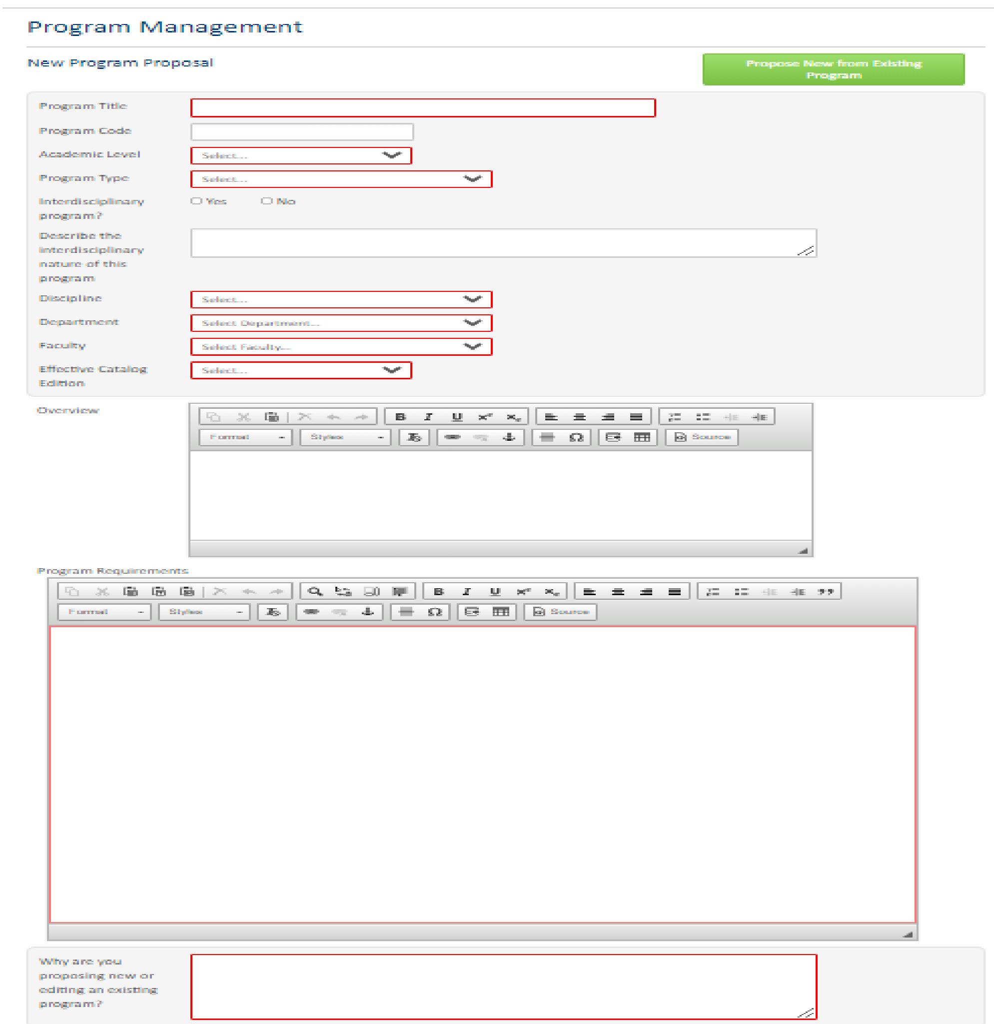
3. After completing the form, click one of the following:
    - **Cancel** to not save any changes and return to the previous window.
    - **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking **Save Changes** does not submit the proposed changes to workflow and will allow you to save without filling out all required

fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses.

- **Save & Submit (Start Workflow)** to save and submit all changes for approval. All required fields must be filled out before the proposal can be submitted for approval. The new course approval will go to the next person in the workflow.

HOW TO PROPOSE A NEW PROGRAM

1. Click the **Propose New Program** button.
2. Complete the form by filling in the required information. When adding tables please contact support (shelley.clarke-raftus@smu.ca) for help if needed.



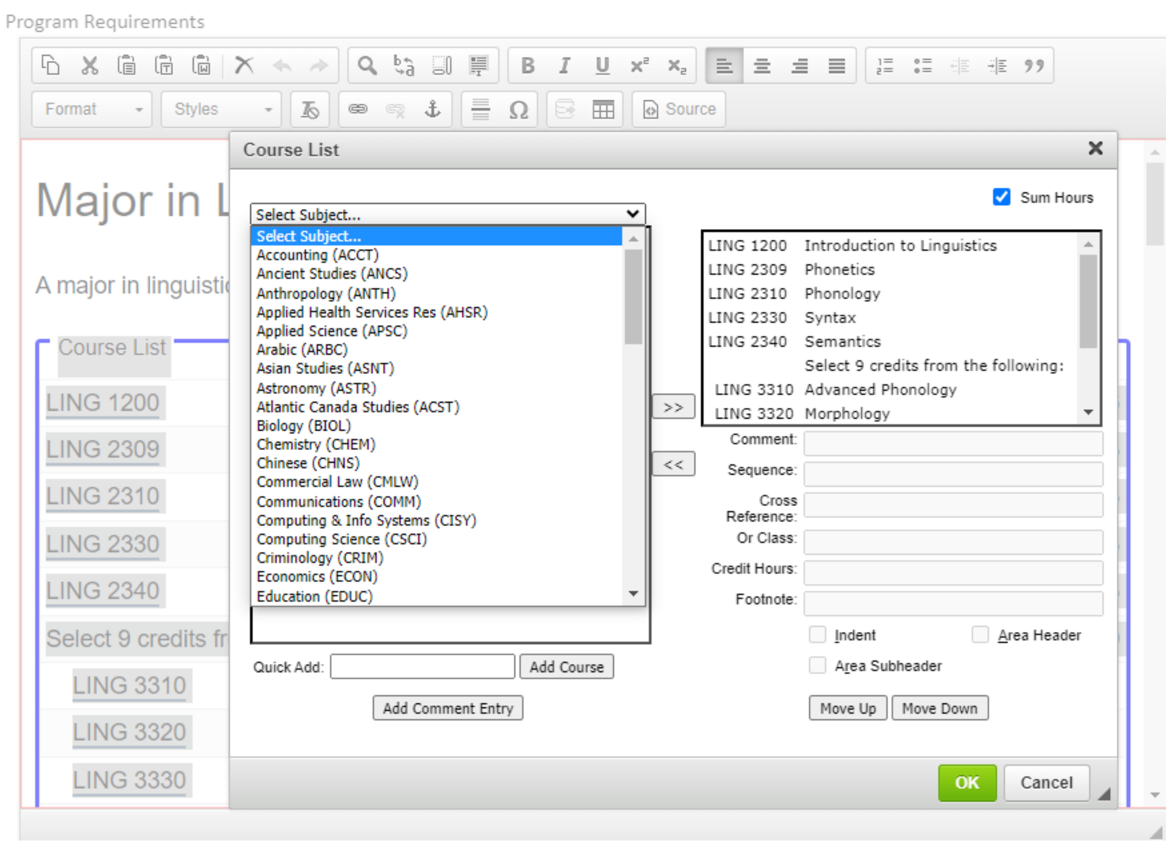
3. After completing the form, click one of the following:
   - **Cancel** to not save any changes and return to the previous window.

- **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking **Save Changes** does not submit the proposed changes to workflow and will allow you to save without filling out all required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses.
- **Save & Submit (Start Workflow)** to save and submit all changes for approval. All required fields must be filled out before the proposal can be submitted for approval. The new course approval will go to the next person in the workflow.

HOW TO EDIT/ADD TABLES IN CIM

COURSE LISTS

A **Course List** is a type of table within CourseLeaf. Courses in a **Course List** are linked to data exported from Banner to provide immediate access to course information. A course list provides information in a pre-formatted table structure and is primarily used to display requirements.



1. **Comment** - A comment will be displayed in parentheses after the course title.

2. **Sequence** - Sequence will display two courses with an ampersand (&) indicating that these two courses must be taken in conjunction with each other.
3. **Cross Reference** - A cross-reference course describes a course that is the same course content offered under different course numbers.
    - For instance, if credit is given at both the undergraduate and graduate level.
    - Another example is a course that different departments offer credit for (cross listed).
4. **Hours** - The hours field automatically is populated with the credit hours assigned to the course in Banner.
    - You can change these as necessary.
5. **Or Class** - This will display two courses with the word "or" indicating that either course may be taken to meet the requirement.
6. **Footnote** - Only the footnote symbol is entered in the course list, and then add a Footnote table after the course list in the Page Body
7. **Indent** - The item will be indented to the right, the credit hours will be suppressed from displaying, and credit hours will be suppressed from adding to your Total Credits. You may also use the hotkey Alt+I to select this check box.
    - For example, a Comment Entry of "Select one of the following:" may precede a list of indented courses. This allows users to see all the options without adding each course's credit hours to the Total Credits
8. **Area Header** - The item will be styled as a header within the table. You also may use the hotkey Alt+A to select this check box.
    - This option is typically used to logically group courses within a Course List
    - For example, grouping "Elective Courses" separately from "Required Courses".

HOW TO ADD A COURSE LIST

1. Open the toolbar and click **Edit Page.**
2. Place cursor in page body where the course list is to be placed.
3. Click **Insert/Edit Formatted Table**
    - ***Note***: Using the Ctrl+T keyboard shortcut also will bring up the Insert/Edit Formatted Table interface
4. Select **Course List** from the drop-down menu.
5. Click **OK**
6. Insert courses.
    - Select **College** and **Department** from drop-down menus.
      Note*: The left-hand column will populate the Course Inventory or a list of courses to*

choose from to add to a list based on the College and Department selected. The right-hand column is the courses used to build the list.

- Option 1:
    i. Select a course from Course Inventory
    ii. Click (**>>**) button to add a course to the list.
- Option 2:
    i. Double-click a course from the Course Inventory
- Option 3:
    i. Enter a course code into **Quick Add**
    ii. Click **Add Course**

7. Click **OK** in the Course List editing screen to close the Course List screen and refresh the Page Body.
8. Click **OK** when finished to save any changes made.

HOW TO REMOVE A COURSE FROM A COURSE LIST

1. Open the toolbar and click **Edit Page.**
2. Double-click on the course list containing the course you want to remove.
3. Select the course you want to remove.
4. Click (**<<**) button to remove a course from the list.
5. Click **OK** in the Course List editor to save your change back to the Page Body Editor.
6. Click **OK** on the Page Body Editor to save all your changes.

HOW TO REORDER COURSES IN A COURSE LIST

1. Open the toolbar and click **Edit Page.**
2. Double-click on the course list containing the courses you want to reorder.
3. Select the course to move.
4. Click **Move Up** or **Move Down** to change the order of the course.
5. Click **OK** in the Course List editor to save your change back to the Page Body editor.
6. Click **OK** on the Page Body editor to save all your changes.

HOW TO ADD A COMMENT ENTRY

A comment entry is anything in your **Course List** that is not a course. Comment entries are often used to create headers within your table or to relay instructions such as "Select one of the following:"

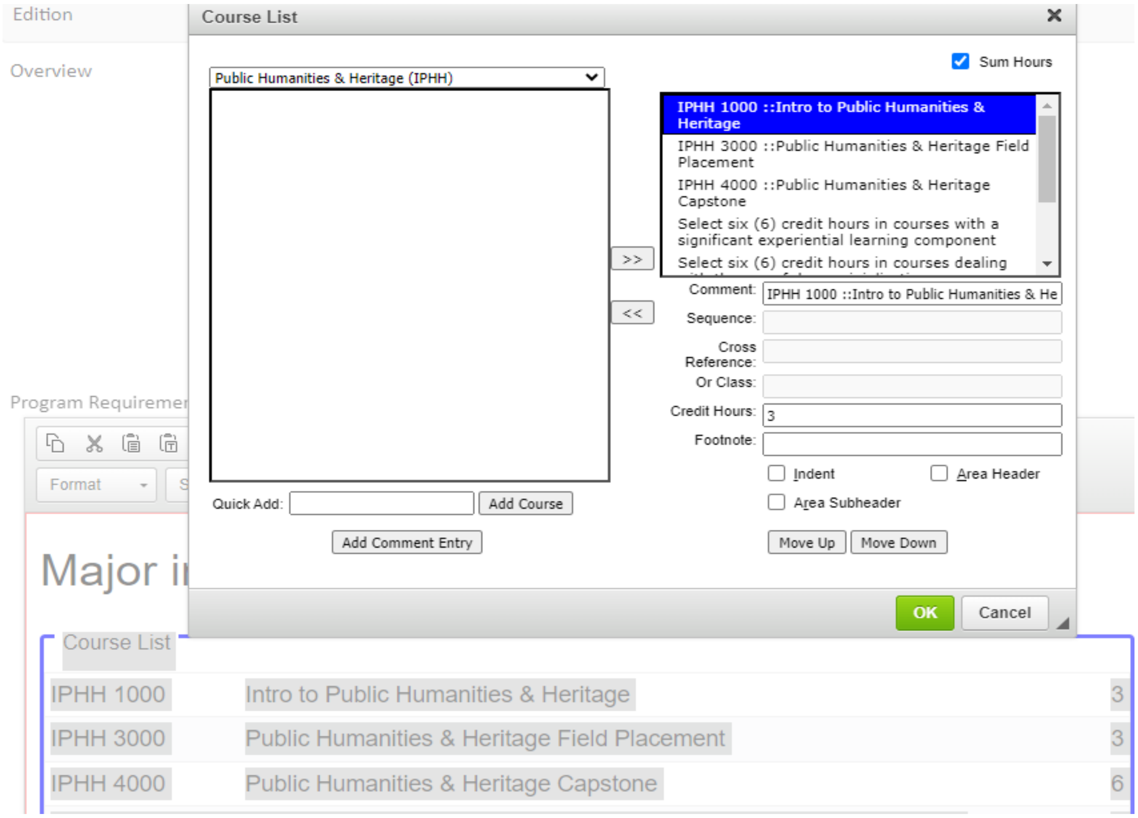
1. Open the toolbar and click **Edit Page.**
2. Double-click on the course list to which you want to add your comment entry.
3. Select in the right-hand list where **Comment Entry** is to be placed.
4. Click **Add Comment Entry**. A text window will open.
5. Enter text to be placed in course list.
6. Click **OK** in the Course List editor to save your change to the Page Body Editor.
7. Click **OK** on the Page Body Editor to save all your changes.

Note*: If a course code (e.g., ENGL 1205) is found in a comment entry, the course code will display the course bubble as all other course codes in the course list.*

HELPFUL HINTS

COMMENT ENTRIES THAT MIMIC COURSE ENTRIES

To make a comment entry that will mimic a course entry, such as any new course not in Banner, add a comment and enter for example, IPHH 1000::Intro to Public Humanities & Heritage. The double-colon (::) between the *1000* and *Intro* will force the part before the double colon to be entered in column 1 and after the double colon to be entered in column 2.



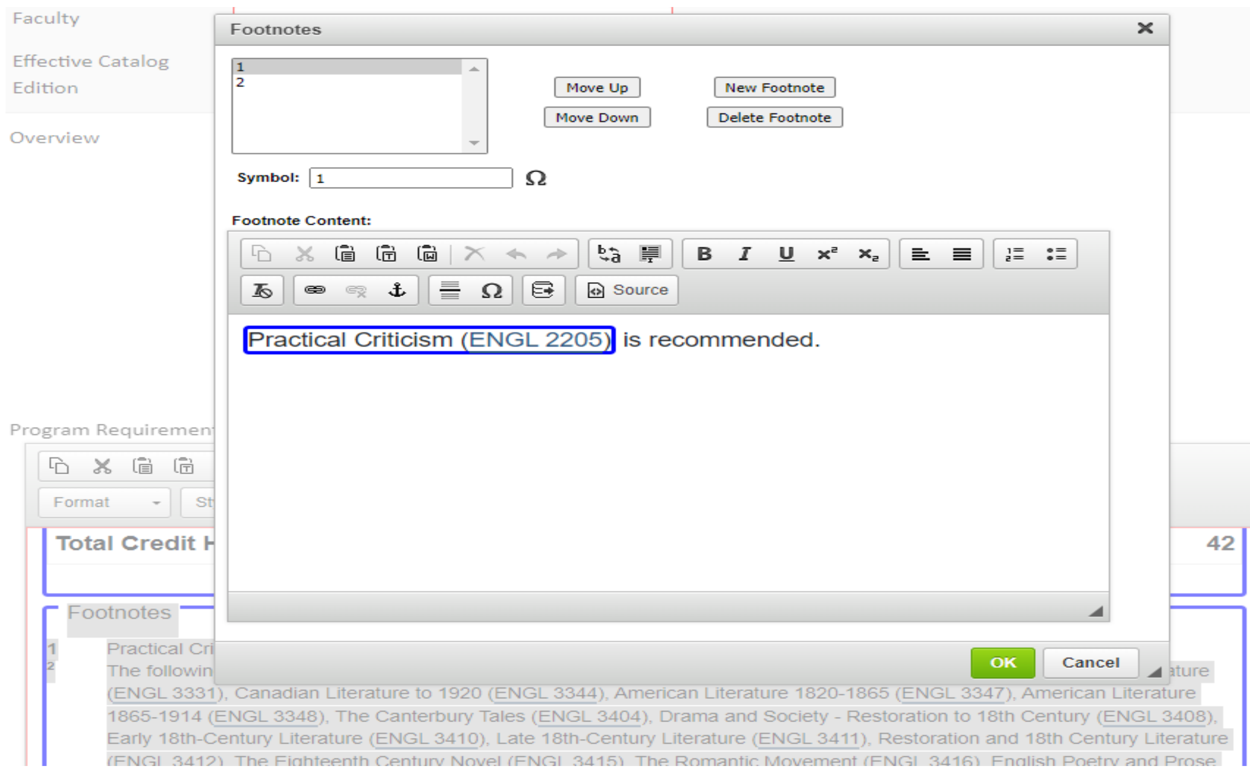
OTHER FORMATTING TIPS

Formatting can be controlled in text fields through special character combinations.

- To make text bold, surround the text in the field with **
- To add a bullet, add one space after the *
- To indent a line in the table, prefix two greater-than signs.
- To indicate text should be superscript, surround the text with brackets.
- To use brackets rather than superscript, add one space after the initial bracket.
- Text beginning with http:// or www. will automatically be turned into hyperlinks.
- To make an area header for the table, surround the text of the first column in curly brackets.

FOOTNOTES

Footnotes have two parts within CourseLeaf: a footnote indicator ($^{1\ 2\ *}$) and a footnote table. Footnote indicators go next to the text or course item, and footnote tables are used to articulate footnotes. Footnote indicators and entries in the footnote table are not automatically linked. This means that when a new indicator is added, an entry must also be added to the table. Likewise, if an entry in the table is deleted, the indicator must also be deleted.



HOW TO INSERT A FOOTNOTE INDICATOR WITHIN TEXT

1. Place cursor in the page body editor where the footnote indicator is to be placed.
2. Type the number or use the **Insert Special Characters (Omega) tool** to add the footnote symbol.
3. Highlight the character and click the **Superscript tool.**
4. Click **OK** to save the page.

HOW TO INSERT FOOTNOTE INDICATOR IN A COURSE LIST

1. Create a course list or plan grid or open the table editor.
2. Click on the course that should have the indicator.
3. Enter the indicator in the footnote field.
4. Click **OK** to save the table.

5. Click **OK** to save the page.

HOW TO INSERT A FOOTNOTE TABLE

1. Place cursor in the page body where the footnote table is to be placed.
2. Click **Insert/Edit Formatted Table.**
3. Select **Footnotes** from the drop-down menu and click **OK.**
4. In the Footnotes editor, click **New Footnote.**
5. Enter the footnote symbol.
6. Enter the footnote content.
7. Repeat to add more footnotes as necessary.
8. Click **OK** to save the table.
9. Click **OK** to save the page.

HOW TO EDIT OR DELETE A FOOTNOTE

1. Double-click the **footnote table blue box.**
2. Select the **footnote indicator.**
3. Enter the footnote content **OR** click **Delete.**
4. Click **OK** to save the table.
5. Click **OK** to save the page.

Note: *Be sure to also edit the corresponding footnote entry in your footnote table.*