

# CIM Courses, CIM Programs, and the UCC

How the UCC process works with the CIM software





Version Control Table						
Version #	Author	Purpose/Change	Date			
1.0	Marissa Tornatore	Initial Draft	8/15/22			
1.1	Marissa Tornatore	Updates and Review of Draft	9/26/22			
1.2	Marissa Tornatore	Updates for Campus Rollout, role names, and steps	11/2/22			



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## **Summary**

This SOP/Companion Guide will walk staff through how to use the CourseLeaf software to submit, review, and approve Course Proposal Forms and Academic Structure forms.

## **Target date**

In production beginning on or near 10/17/2022; this date is dependent on vendor completion. Roll out for campus use week of 11/14/22.

## **Related SOPs and Companion Guides**

- How to Fill Out a Course Proposal (CIM)
- How to Propose and Edit to an Existing Course (CIM)
- How to Inactivate a Course (CIM)
- How to Reactivate a Course (CIM)
- CIM Programs/Academic Structure Companion Guide
- Pages Pending Approval Companion Guide
- UCC Courses Process
- UCC Courses Flowchart

## **Process Overview for Course Proposal Forms**

Generalized order of operations (To see the full UCC review process, including what types of courses are reviewed by the UCC, please refer to the UCC Courses Process and UCC Courses Flowchart on the CU-SIS Dev website).

- 1. Course coordinators will fill out the Course Proposal Form using the CIM Courses form by Thursday.
- 2. On Fridays, the UCC Chair will click the "Approved" Button to move previously submitted forms forward into either the UCC Full Proposal Courses queue or the Signature Authority queues.
  - Courses that were in the UCC New NOI Courses queue were the Week 1 forms and need to be moved into the Week 2 workflow of UCC Full Proposal Courses
  - b. Courses that were in the UCC Full Proposal Courses were the Week 2 forms and need to be moved into the School/College Signature Authority role as those forms have completed the UCC review process
- 3. Also on Fridays, the Registrar's Office will review all newly submitted forms to ensure they have been filled out correctly and by the designated course coordinators. After this review, the Registrar's Office will click the "Approved" button to move the forms into the UCC New NOI Courses step.
  - a. This is a new step as this is new software being utilized for this process. The only role of the Registrar's Office wants to ensure forms are being filled out



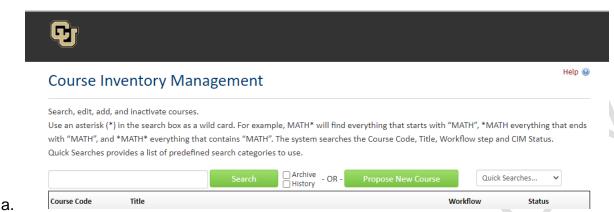
- correctly, being filled out by the designated staff, and to ensure the software is functioning as expected.
- b. This step also gives the UCC Chair time to move the previously submitted forms into the next steps of the workflow.
- 4. The UCC Chair will email the Registrar's Office after they have moved forms into the correct queues. The Registrar's Office will then route the forms from there queue into the appropriate queue.
- 5. After the forms are in the correct queues, the Registrar's Office will generate a report to send to the UCC of which courses are in the UCC New NOI Courses and UCC Full Proposal Courses queues.
- 6. The UCC will send this report out on Fridays to the School/College/Program representatives on the UCC distribution email.
  - a. This report will show which courses are in the UCC New NOI Courses Step and which courses are in the UCC Full Proposal Courses Step.
- 7. Week 1- School/College/Program representatives will be able to view the course proposal form and contact each other if there are further questions about the requested course.
  - a. If there are questions or concerns, the representatives will contact the UCC to request the form not be "approved" in the workflow queue to move into the UCC Full Proposal Courses Step Queue in the upcoming week
  - b. If there are no questions or concerns, the representatives do not need to take further action and the form will be "approved" to move into the UCC Full Proposal Courses Step Queue in the upcoming week
- 8. Week 2- School/College/Program representatives will be able to view the course proposal form and contact each other if there are further questions about the requested course.
  - a. If there are questions or concerns, the representatives will contact the UCC to request the form not be "approved" in the workflow queue to move into the Signature Authority Queue in the upcoming week
  - b. If there are no questions or concerns, the representatives do not need to take further action and the form will be "approved" to move into the Signature Authority Queue in the upcoming week

## **Procedure for Course Proposal Forms**

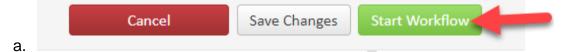
#### **Step 1: Submitting the Course Proposal Form**

Coordinators will go to <a href="http://nextcatalog.ucdenver.edu/courseadmin/">http://nextcatalog.ucdenver.edu/courseadmin/</a> and fill out either a Propose New Course form or edit an existing course by using the Search functionality to find the existing course in CIM Courses.



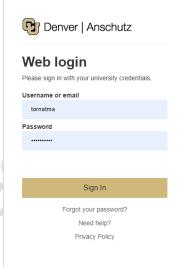


- Please refer to the How to Fill Out a Course Proposal (CIM) Document for further details on filling out and using this form.
- After the form is filled out and ready to be submitted by Thursday, course coordinators will click on Start Workflow.



# Step 2: Reviewing and understanding the Course Proposal Form (for Registrar's Office and UCC)

- 1. To review the form, go to the Pages Pending Approval queue website https://nextcatalog.ucdenver.edu/courseleaf/approve/
  - a. This website is behind Single Sign On (SSO) and users need to be provisioned into the CourseLeaf software to view the forms.



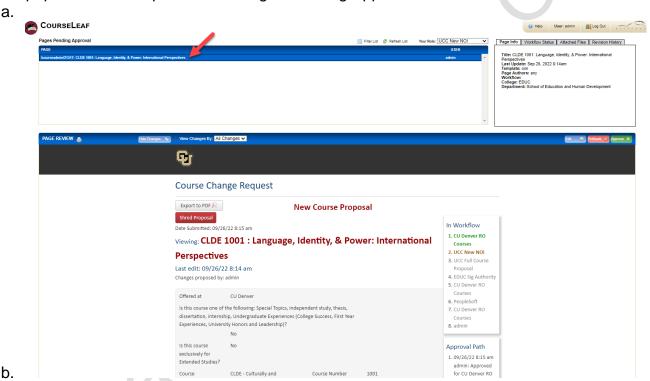
- b.
- If a user is unable to login, they will need to email <u>courses@ucdenver.edu</u> to determine the next steps to be provisioned
- 2. To view the forms in each queue, go the dropdown menu next to "Your Role:" look for the Role Name of UCC New NOI Courses and UCC Full Proposal Courses



a. This dropdown will default to the user's name, however the user will need to select the queue that they want to view.



3. Once the role is selected, all Course Proposal form requests that need to be reviewed will be populated in this queue in the Pages Pending Approval window.



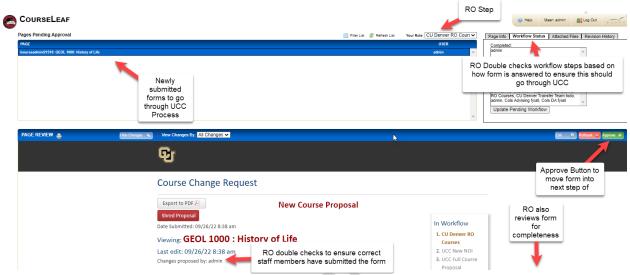
4. The Pages Pending Approval Companion Guide provides a breakdown of all the important areas to review and components of this queue that are not related to the form

# Step 3a: "Approving" the Course Proposal Form (When CIM first launches OR all forms have been cleared out)

- Each Friday, the Registrar's Office will verify there are no forms in the UCC New NOI Courses or UCC Full Proposal Courses queues.
- 2. If there are not, prior to the UCC receiving forms, the Registrar's Office will have a step to ensure the form should go to the UCC, the designated form submitters (ie the course coordinators for each school/college/department) have submitted the form, and that the form has been fully filled out.



a. The Registrar's Office is not a voting member of the UCC or a part of any formal review process conducted by the schools/colleges/departments. Their only role is to ensure the software is functioning as expected and the correct staff members have submitted the form.

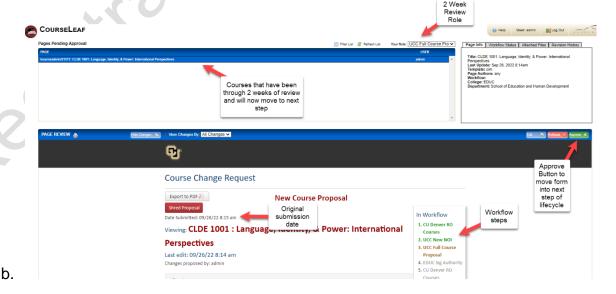


- i. If person who submitted the form is not one of the designated submitters or if the form is not filled out completely, the form will be returned to fix.
- ii. If the form should not go to the UCC based on the guidelines, the RO will manually change the workflow for the form.

C.

b.

- 3. The next Friday, the UCC will go into the UCC New NOI Courses step first in Pages Pending Approval and "approve" these courses as they have been through the first week of the review process. Forms will move into the UCC Full Proposal Courses queue. The UCC will then alert the Registrar's Office to "approve" courses in their Initial queue so they will then appear in the UCC New NOI Courses queue.
  - a. Important Note: Courses are listed alphabetically, not by day/time. It will be important to review the previous reports and/or Date Submitted

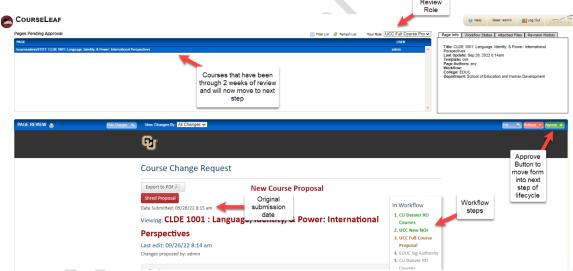




- 4. After all forms have been routed into their next steps, the Registrar's Office will pull an Excel spreadsheet report to send to the UCC identifying which courses are in the UCC New NOI step and the UCC Full Course Proposal Step.
- 5. The UCC will email the report out to the distribution list for staff to review forms. Anyone who is provisioned into the CourseLeaf software will be able to review the forms.
- 6. From this point and on, step 3b should be followed.

# Step 3b: "Approving" the Course Proposal Form (after CIM Courses has launched and there are forms in multiple queues)

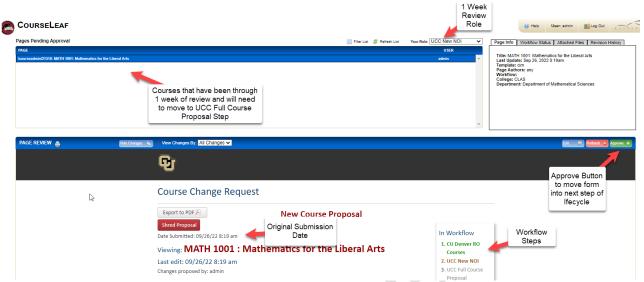
- Each Friday, the UCC will go into the UCC Full Proposal Courses step first in Pages Pending Approval and "approve" these courses as they have been through the 2-week review process. This means that the course is ready to be built in CU-SIS by the Registrar's Office.
  - a. Important Note: Courses are listed alphabetically, not by day/time. It will be important to review the previous reports and/or Date Submitted



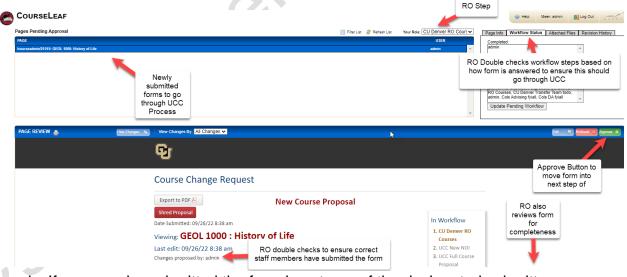
- 2. After the UCC Full Course Proposal step has been cleared of all courses that have not been identified as having any concerns/issues, the UCC will go into the UCC New NOI Courses step in Pages Pending Approval and "approve" courses that have not been identified as having any concerns/issues as they have been through the 1week review process.
  - a. Important Note: Courses are listed alphabetically, not by day/time. It will be important to review the previous reports and/or Date Submitted



b.



- Prior to the UCC receiving forms, the Registrar's Office will have a step to ensure the form should go to the UCC, the designated form submitters (ie the course coordinators for each school/college/department) have submitted the form, and that the form has been fully filled out.
  - a. The Registrar's Office is not a voting member of the UCC or a part of any formal review process conducted by the schools/colleges/departments. Their only role is to ensure the software is functioning as expected and the correct staff members have submitted the form.



- i. If person who submitted the form is not one of the designated submitters or if the form is not filled out completely, the form will be returned to fix.
- ii. If the form should not go to the UCC based on the guidelines, the RO will manually change the workflow for the form.
- 4. Once the form is "Approved" by the Registrar's Office (on the agreed upon day/time), an email will be generated and sent to the UCC email address to let the UCC know there is a new form in their queue.

- 5. After all forms have been routed into their next steps, the Registrar's Office will pull an Excel spreadsheet report to send to the UCC identifying which courses are in the UCC New NOI Courses step and the UCC Full Proposal Courses Step.
- 6. The UCC will email the report out to the distribution list for staff to review forms. Anyone who is provisioned into the CourseLeaf software will be able to review the forms.

#### **Process Overview for Academic Structure Forms**

Generalized order of operations

- 1. Course coordinators will fill out the Academic Structure Form using the CIM Programs form by Thursday.
- 2. On Fridays, the UCC Chair will click the "Approved" Button to move previously submitted forms forward into either the UCC Full Proposal Programs queue or the CU Denver OIRE queues.
  - a. Programs that were in the UCC New NOI Programs queue were the Week 1 forms and need to be moved into the Week 2 workflow of UCC Full Proposal Programs
  - Programs that were in the UCC Full Proposal Programs were the Week 2 forms and need to be moved into the CU Denver OIRE role as those forms have completed the UCC review process
- 3. Also on Fridays, the Registrar's Office will review the newly submitted forms to ensure they have been filled out correctly and by the designated course coordinators. After this review, the Registrar's Office will click the "Approved" button to move the forms into the UCC New NOI Programs step.
  - a. This is step was created as new software being utilized for this process. The only role of the Registrar's Office is to ensure forms are being filled out correctly, being filled out by the designated staff, and to ensure the software is functioning as expected.
- 4. The UCC Chair will email the Registrar's Office after they have moved forms into the correct queues. The Registrar's Office will then route the forms from there queue into the appropriate queue.
- 5. After the forms are in the correct queues, the Registrar's Office will generate a report to send to the UCC of which programs are in the UCC New NOI Programs and UCC Full Proposal Programs queue.
- 6. The UCC will send this report out on Fridays.
- 7. Week 1 and 2- School/College/Program representatives will be able to view the Academic Structure form and contact each other if there are further questions about the requested program.
  - a. If there are questions or concerns, the representatives will contact the UCC to request the form not be "approved" in the workflow queue to move into the CU Denver OIRE queue



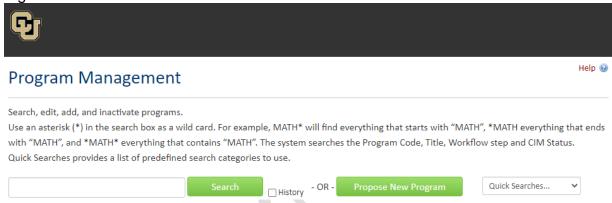
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b. If there are no questions or concerns, the representatives do not need to take further action and the form will be "approved" to move into the Bursar/OIRE/FASO queue in the upcoming week

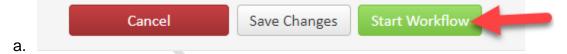
#### **Procedure for Academic Structure Forms**

#### **Step 1: Submitting the Academic Structure Form**

 Coordinators will go nextcatalog.ucdenver.edu/programadmin/ and fill out a Propose New Program form.



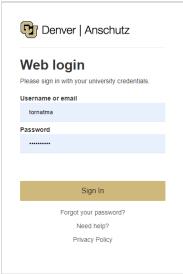
- b. Please refer to the CIM Programs Companion Guide for further details on filling out and using this form.
- 2. After the form is filled out and ready to be submitted by Thursday, course coordinators will click on Start Workflow.



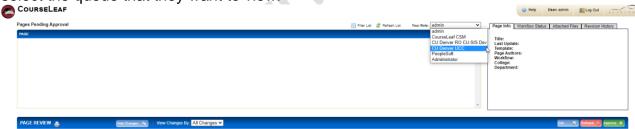
# Step 2: Reviewing and Understanding the Academic Structure Form (for Registrar's Office and UCC)

- To review the form, go to the Pages Pending Approval queue website https://nextcatalog.ucdenver.edu/courseleaf/approve/
  - a. This website is behind Single Sign On (SSO) and users need to be provisioned into the CourseLeaf software to view the forms.

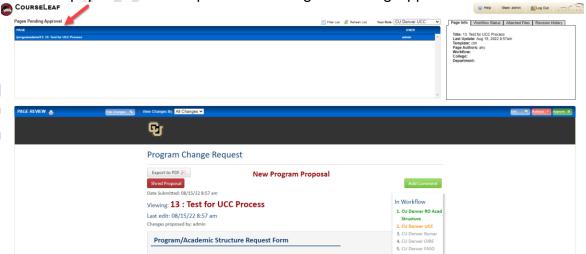
a.



- b.
   c. If a user is unable to login, they will need to email <u>courses@ucdenver.edu</u> and/or <u>cusisdev@ucdenver.edu</u> to determine the next steps to be provisioned.
- 2. To view the forms in each queue, go the dropdown menu next to "Your Role:" look for the Role Name of CU Denver UCC.
  - a. This dropdown will default to the user's name, however the user will need to select the queue that they want to view.



3. Once the role is selected, all the Academic Structure requests that need to be reviewed will be populated in this queue in the Pages Pending Approval window.

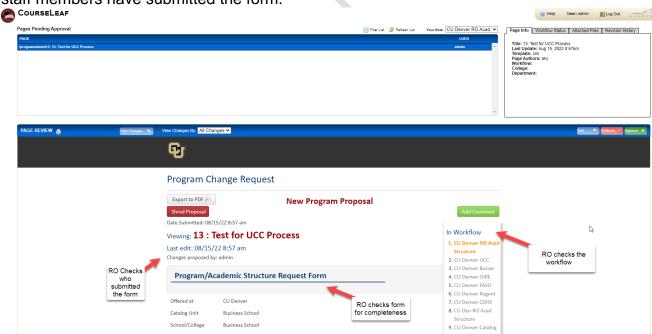




4. The Pages Pending Approval Companion Guide provides a breakdown of all the important areas to review and components of this queue that are not related to the form

# Step 3a: "Approving" the Academic Structure Form (When CIM first launches OR all forms have been cleared out)

- 1. Each Friday, the Registrar's Office will verify there are no forms in the UCC New NOI Programs or UCC Full Proposal Programs queues.
- 2. If there are not, prior to the UCC receiving forms, the Registrar's Office will have a step to ensure the form should go to the UCC, the designated form submitters (ie the course coordinators for each school/college/department) have submitted the form, and that the form has been fully filled out.
  - a. The Registrar's Office is not a voting member of the UCC or a part of any formal review process conducted by the schools/colleges/departments. Their only role is to ensure the software is functioning as expected and the correct staff members have submitted the form.



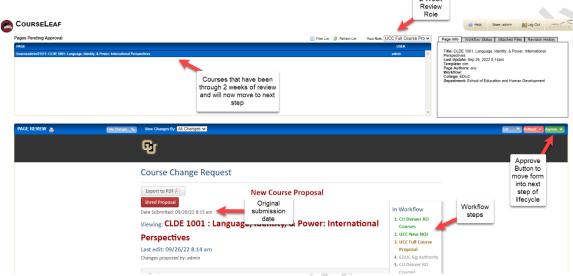
- b.

  i. If person who submitted the form is not one of the designated submitters or if the form is not filled out completely, the form will be returned to fix.
  - ii. If the form should not go to the UCC based on the guidelines, the RO will manually change the workflow for the form.
- 3. The next Friday, the UCC will go into the UCC New NOI Programs step first in Pages Pending Approval and "approve" these programs as they have been through the first week of the review process. Forms will move into the UCC Full Proposal Programs



queue. The UCC will then alert the Registrar's Office to "approve" programs in their Initial queue so they will then appear in the UCC New NOI Programs queue.

 a. Important Note: Programs are listed by a system generated number, not by day/time. It will be important to review the previous reports and/or Date Submitted



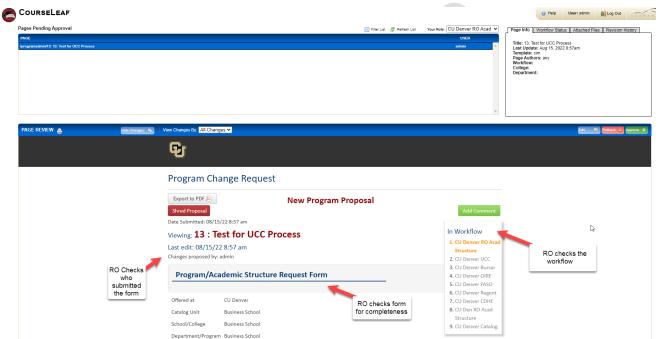
- 4. After all forms have been routed into their next steps, the Registrar's Office will pull an Excel spreadsheet report to send to the UCC identifying which programs are in the UCC New NOI Programs step and the UCC Full Proposal Programs Step.
- 5. The UCC will email the report out to the distribution list for staff to review forms. Anyone who is provisioned into the CourseLeaf software will be able to review the forms.
- 6. From this point and on, step 3b should be followed.

# Step 3b: "Approving" the Academic Structure Form (after CIM Programs has launched and there are forms in multiple queues)

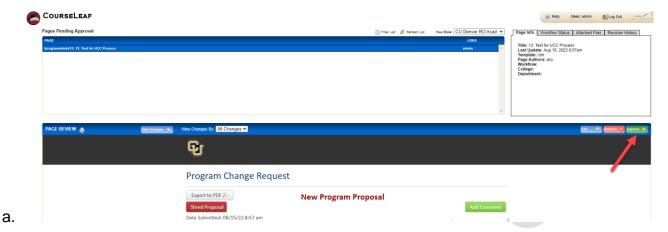
- 1. Each Friday, the UCC will go into the UCC Full Proposal Programs step first in Pages Pending Approval and "approve" these courses as they have been through the 2-week review process. This means that the program is ready to be built in CU-SIS by the Registrar's Office.
  - Important Note: Programs are listed by a system generated number, not by day/time. It will be important to review the previous reports and/or Date Submitted
- 2. After the UCC Full Proposal Program step has been cleared of all programs that have not been identified as having any concerns/issues, the UCC will go into the UCC New NOI Programs step in Pages Pending Approval and "approve" programs that have not been identified as having any concerns/issues as they have been through the 1week review process.



- Important Note: Programs are listed by a system generated number, not by day/time. It will be important to review the previous reports and/or Date Submitted
- Prior to the UCC receiving forms, the Registrar's Office will have a step to ensure the form should go to the UCC, the designated form submitters (ie the course coordinators for each school/college/department) have submitted the form, and that the form has been fully filled out.
  - a. The Registrar's Office is not a voting member of the UCC or a part of any formal review process conducted by the schools/colleges/departments. Their only role is to ensure the software is functioning as expected and the correct staff members have submitted the form.



- i. If person who submitted the form is not one of the designated submitters or if the form is not filled out completely, the form will be returned to fix.
- ii. If the form should not go to the UCC based on the guidelines, the RO will manually change the workflow for the form.
- 4. The Registrar's Office will click the "Approve" button to forward the form to the UCC New NOI Programs step to start the UCC process.



- 5. Once the form is "Approved" by the Registrar's Office (on the agreed upon day/time), an email will be generated and sent to the UCC email address to let the UCC know there is a new form in their queue.
- 6. After all forms have been routed into their next steps, the Registrar's Office will pull an Excel spreadsheet report to send to the UCC identifying which programs are in the UCC New NOI Programs step and the UCC Full Proposal Programs step.
- 7. The UCC will email the report out to the distribution list for staff to review forms. Anyone who is provisioned into the CourseLeaf software will be able to review the forms.

# **Security Access**

CS ROLE/PERMISSION LIST	Candice Shelby
COURSELEAF	Provisioned for CourseLeaf in CU Denver UCC role

## **Additional Tips & Notes**

1. Users who have been provisioned into the CourseLeaf software, can review where a form is in the workflow process

## **Troubleshooting & Points of Contact**

Registrar's Office

Contact Name	Title	Email



Marissa Tornatore	Assistant Registrar for Catalog and Curriculum Management	courses@ucdenver.edu
Allison Diekhoff	Associate Registrar for CU- SIS Development and Curriculum Services	cusisdev@ucdenver.edu
Joel Perez	Registrar Specialist for Catalog and Curriculum Management	courses@ucdenver.edu