

CourseLeaf PIM Training Guide

APPROVING STEPS

University Student Records Office

Kori Plank, Associate Registrar –
Curriculum Systems

krkeyes@nmsu.edu

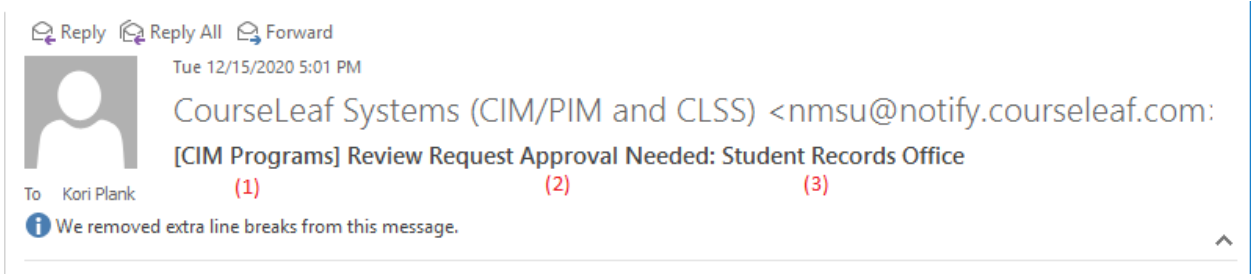
The logo for New Mexico State University, featuring the letters "NM" in a large, serif font above the words "STATE" and "UNIVERSITY" in a smaller, sans-serif font, all contained within a white square with a dark red border.

NM
STATE
UNIVERSITY

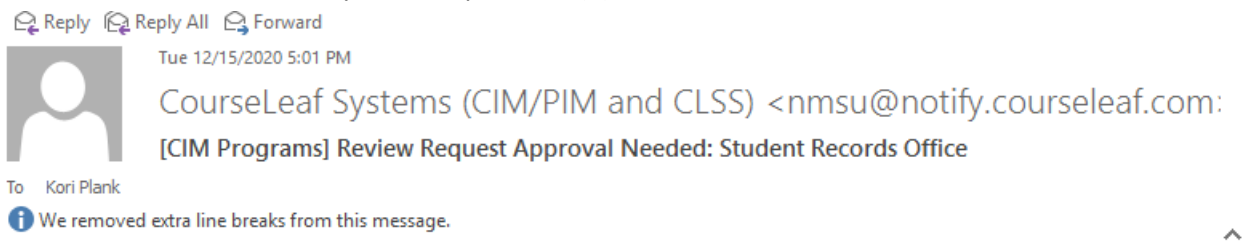
BE BOLD. Shape the Future.

CourseLeaf PIM Approving Steps

1. **Auto-generated email based on role:** The system creates an email when the program reaches your approving level. The email will look like the one below but the title of the program and the role names will vary based on your approving role (for a list of approving roles see Appendix A).
 - a. You will see which system the email pertains to (1); if approval is needed (2) and the role (3) in the subject line of the email itself



- b. Within the email will be the name of the program (1); the link to the approval area (2); and a contact if you have questions (3).



****Warning:** This email originated external to the NMSU email system. Do not click on links or open attachments unless you are sure the content is safe.

Kori:

There are pending program change proposals awaiting your review, including
684: Diagnostic Medical Sonography - Certificate of Completion. (1)

Please visit:

<https://catalogs-u.nmsu.edu/courseleaf/approve/?role=Student%20Records%20Office> (2)
to review the changes and provide your feedback.

For questions or information regarding this email, please reply to this email (krkeyes@nmsu.edu). (3)

Thank you.

-- CourseLeaf

2. **Navigating to the Approve site:** once you click the link in the email it will take you directly to that proposal in the system. You will see the workflow that has been completed and is pending and the red/green markup of changes being requested (**Note – if it a new program no markup will exist*)

COURSELEAF Help User: Kori Plank Log Out

Pages Pending Approval Filter List Refresh List Your Role: Student Records Office

PAGE	USER
/programadmin/16: 16: Education (Elementary) - Associate in Education	Linda Beavers
/programadmin/684: 684: Diagnostic Medical Sonography - Certificate of Completion	Darla Matthew
/programadmin/796: 796: Natural Gas Compression Technology - Associate of Applied Science	Kori Plank

Page Info Workflow Status Attached Files Revision History

Title: 16: Education (Elementary) - Associate in Education
 Last Update: Dec 2, 2020 8:11am
 Template: cim
 Page Authors: any
 Workflow:
 College: CC
 Department: Occupational Education

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

NM STATE BE BOLD. Shape the Future. New Mexico State University

Program Change Request

- Export to PDF
- Export to Word
- Shred Proposal

Date Submitted: 12/02/20 8:11 am

Viewing: **16 : Education (Elementary) - Associate in Education**

Last edit: 12/02/20 8:11 am

Changes proposed by: Linda Beavers (libeaver)

Catalog Pages Using this Program
[Education \(Elementary\) - Associate in Education](#)

Submission Information

Change Type **Program Modification**

- The Degree Type will factor into the level and the submissions that must occur for HED and HLC.
- Community College Types: Applied Associate Degree, Associate Degree, Certificate, Concentration
 - Main Campus Undergrad Types: Bachelor's Degree, Concentration, Minor
 - Main Campus Graduate Types: Master's Degree, Doctoral Degree, Certificate, Concentration, Minor

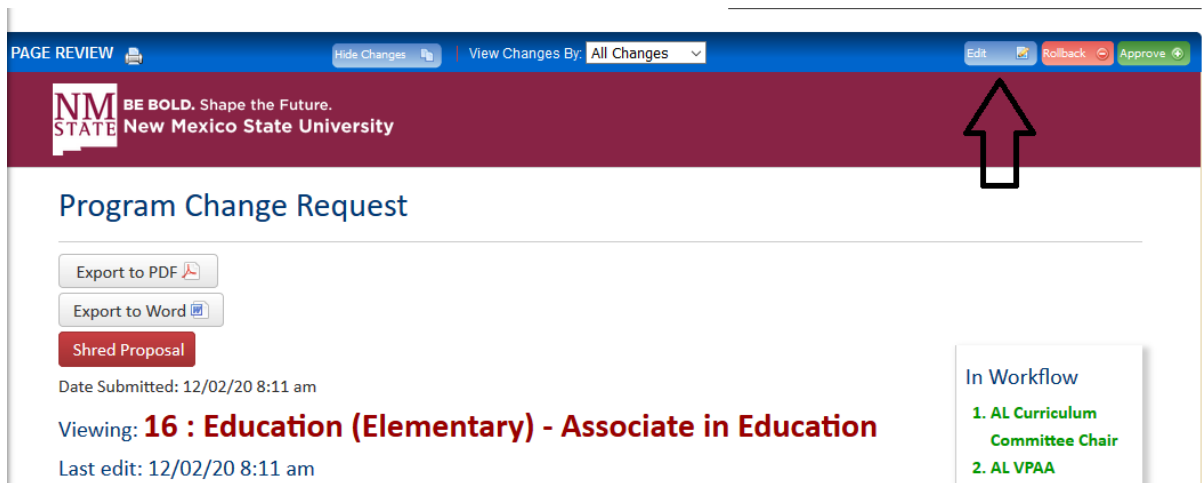
In Workflow

- AL Curriculum Committee Chair
- AL VPAA
- CCAVP - Chair
- Student Records Office

Approval Path

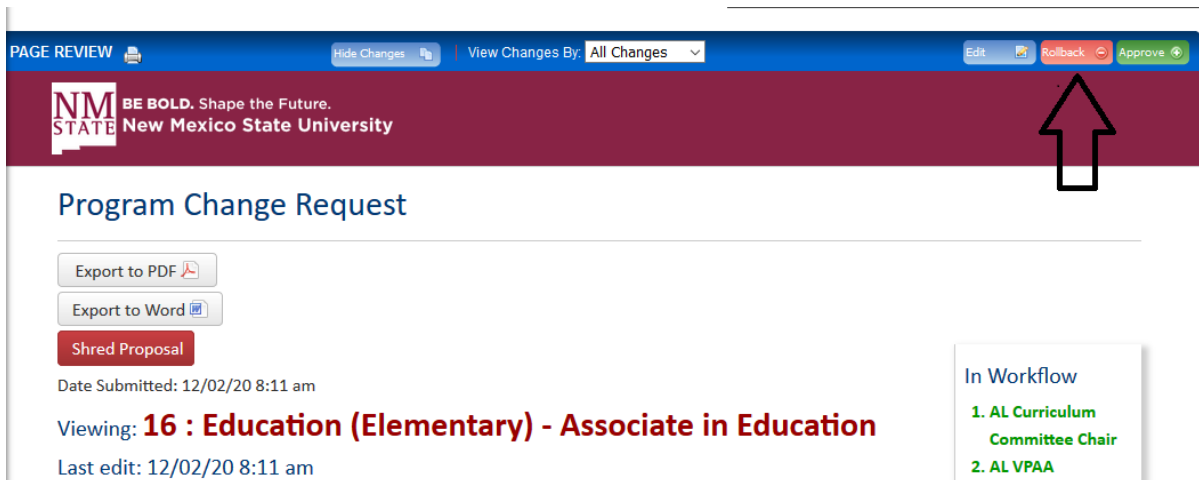
- 12/02/20 8:19 am
Linda Beavers (libeaver): Approved for AL Curriculum Committee Chair
- 12/03/20 2:29 pm
Mark Cal (mcal): Approved for AL VPAA
- 12/04/20 3:44 pm
Shelly Stravall

3. **Functions of the approving system:** You will then be able to review the program submission the following tools are available.
- a. You can either edit the proposal if you see minor typos,



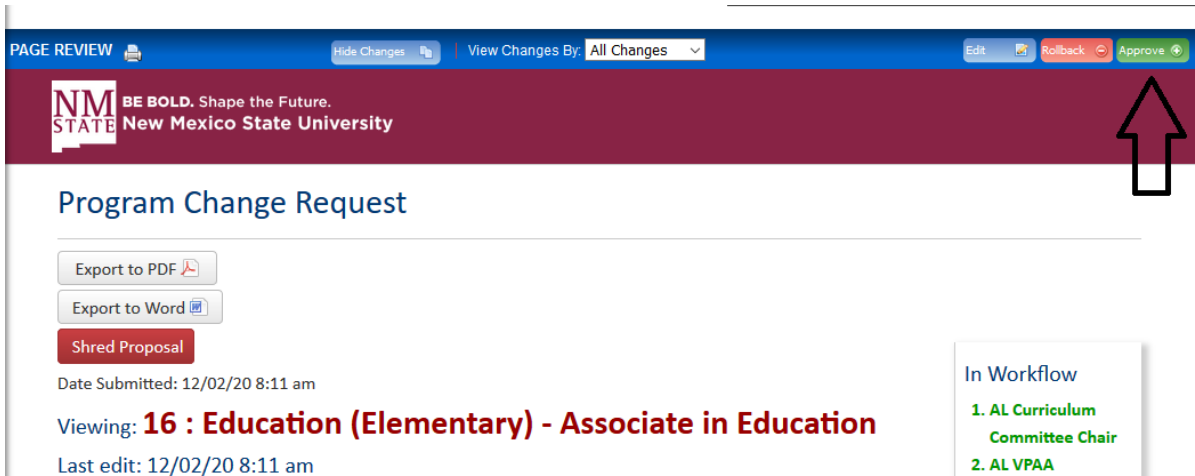
The screenshot shows the 'Program Change Request' interface. At the top, there is a blue navigation bar with 'PAGE REVIEW' on the left and 'Edit', 'Rollback', and 'Approve' buttons on the right. Below this is a maroon header with the New Mexico State University logo and the slogan 'BE BOLD. Shape the Future. New Mexico State University'. The main content area is white and contains the title 'Program Change Request', three buttons ('Export to PDF', 'Export to Word', 'Shred Proposal'), submission details ('Date Submitted: 12/02/20 8:11 am'), and viewing information ('Viewing: 16 : Education (Elementary) - Associate in Education', 'Last edit: 12/02/20 8:11 am'). On the right side, there is a 'In Workflow' box listing '1. AL Curriculum Committee Chair' and '2. AL VPAA'. A black arrow points to the 'Edit' button in the top navigation bar.

- b. Rollback the proposal with a comment informing the submitter to make changes (please ensure you select the correct role to rollback to)



This screenshot is identical to the previous one, showing the 'Program Change Request' page. A black arrow points to the 'Rollback' button in the top navigation bar.

- c. Approve the proposal to the next step in the workflow.



This screenshot is identical to the previous ones, showing the 'Program Change Request' page. A black arrow points to the 'Approve' button in the top navigation bar.

4. **Exporting Documentation:** If your role is committee based, you can export the document for distribution. The document can be in a PDF or Word format.

PAGE REVIEW | Hide Changes | View Changes By: All Changes

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New Mexico State University

Program Change Request

[Export to PDF](#)

[Export to Word](#)

[Shred Proposal](#)

Date Submitted: 12/02/20 8:11 am

Viewing: **16 : Education (Elementary) - Associate in Education**

Last edit: 12/02/20 8:11 am

5. **Adding Approving Comments:** If you have comments you would like to add for your role (i.e., voting numbers, date of the committee meeting when it was approved, etc.) you can do so by:
- Hitting the “Edit” button

[Edit](#) [Rollback](#) [Approve](#)

In Workflow

- AL Curriculum Committee Chair
- AL VPAA

- A new window will open with the program in the “editing” format. Scrolling down to the very bottom of the proposal to see “Reviewer Comments” add the appropriate information there. Hit the “Save Changes” button to save the comment.

CIP Code

Attachment [Attach File](#)

Uploaded Files:

Files To Be Uploaded:

Reviewer Comments

[Cancel](#) [Save Changes](#)

APPENDIX A: Approving Roles within the PIM System

FYI – Notification (Non-Approval) = roles that are not responsible for approving programs based on the ARP 4.81 matrixes but need to be notified of program changes.

Approval = roles that are defined on the ARP 4.81 matrixes that are required for the program submission to be finalized in banner and within the catalogs.

Role/User	Type of Approval	Type of Submission(s)
Admissions	FYI - Non Approval	Changes to Existing; New Programs
AG Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
AL Advising	FYI - Non Approval	Changes to Existing; New Programs
AL Curriculum Committee Chair	Approval	Changes to Existing; New Programs
AL HLC	Approval	New Programs
AL IR	FYI - Non Approval	Changes to Existing; New Programs
AL President	Approval	New Programs
AL VPAA	Approval	Changes to Existing; New Programs
AL VPAA Office	Approval	Changes to Existing; New Programs
ALAS Division Head	Approval	Changes to Existing; New Programs
ALCT Division Head	Approval	Changes to Existing; New Programs
AS Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
BA Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
Board of Regents	Approval	New Programs (Main campus and Associate Degrees only)
CA Advising	FYI - Non Approval	Changes to Existing; New Programs
CA Curriculum Committee Chair	Approval	Changes to Existing; New Programs
CA HLC	Approval	New Programs
CA IR	FYI - Non Approval	Changes to Existing; New Programs
CA President	Approval	New Programs
CA VPAA	Approval	Changes to Existing; New Programs
CA VPAA Office	Approval	Changes to Existing; New Programs
CCAVP	Approval	Changes to Existing; New Programs
CCAVP - Chair	Approval	Changes to Existing; New Programs
Clearinghouse	FYI - Non Approval	Changes to Existing; New Programs
Commencement	FYI - Non Approval	Changes to Existing; New Programs
DA Advising	FYI - Non Approval	Changes to Existing; New Programs
DA Curriculum Committee Chair	Approval	Changes to Existing; New Programs
DA HLC	Approval	New Programs

DA IR	FYI - Non Approval	Changes to Existing; New Programs
DA President	Approval	New Programs
DA VPAA	Approval	Changes to Existing; New Programs
DA VPAA Office	Approval	Changes to Existing; New Programs
DAAHSS Division Dean	Approval	Changes to Existing; New Programs
DAAT Division Dean	Approval	Changes to Existing; New Programs
DAAT Division Dean	Approval	Changes to Existing; New Programs
DABPS Division Dean	Approval	Changes to Existing; New Programs
DAHS Division Dean	Approval	Changes to Existing; New Programs
DAHS Division Dean	Approval	Changes to Existing; New Programs
DASEM Division Dean	Approval	Changes to Existing; New Programs
Degree Audit	FYI - Non Approval	Changes to Existing; New Programs
ED Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
EG Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
Financial Aid	Approval	New Certificate Programs
GR Advising	FYI - Non Approval	Changes to Existing; New Programs
GR Curriculum Committee	Approval	Changes to Existing; New Programs
GR HLC	Approval	New Programs
GR IR	FYI - Non Approval	Changes to Existing; New Programs
GR President	Approval	New Programs
GR VPAA	Approval	Changes to Existing; New Programs
GR VPAA Office	Approval	Changes to Existing; New Programs
Graduate Dean	Approval	Changes to Existing; New Programs (Graduate only)
Graduate School	FYI - Non Approval	Changes to Existing; New Programs (Graduate only)
Graduate School - Council of Deans	Approval	Graduate Programs (Graduate Cert - only if new funding is needed)
HS Curriculum Committee	Approval	New Programs; Changes to Supplemental Majors
MA Advising	FYI - Non Approval	Changes to Existing; New Programs
MA HLC	Approval	New Programs
MA IR	FYI - Non Approval	Changes to Existing; New Programs
NM Board of Finance	Approval	Graduate Programs (Graduate Cert - only if new funding is needed)
NMSU-O	Approval and an FYI- Non Approval (all subs)	New Online Programs; Changing to Online format/adding an online format to existing program
President	Approval	New Programs

Provost	Approval	New Programs; Changes to Undergraduate/Graduate Degrees and Majors, and Supplemental Majors
Scholar Dollars	FYI - Non Approval	Changes to Existing; New Programs
SIM	FYI - Non Approval	Changes to Existing; New Programs
Student Records Office	Approval	All Submissions to process in banner and add updates to the catalog
Student Records Office - CIP	Approval	New Programs; Existing Programs with CIP Code Update
Student Records Office - HED	Approval	New Programs
UPAC	FYI - Non Approval	New Programs; Changes to Concentrations, Minors and Graduate Certificates
UPAC - Chair	Approval	New Programs; Changes to Concentrations, Minors and Graduate Certificates
AS Academic Dean	Approval	Changes to Existing; New Programs
AG Academic Dean	Approval	Changes to Existing; New Programs
AG Academic Dean	Approval	Changes to Existing; New Programs
BA Academic Dean	Approval	Changes to Existing; New Programs
ED Academic Dean	Approval	Changes to Existing; New Programs
EG Academic Dean	Approval	Changes to Existing; New Programs
HS Academic Dean	Approval	Changes to Existing; New Programs