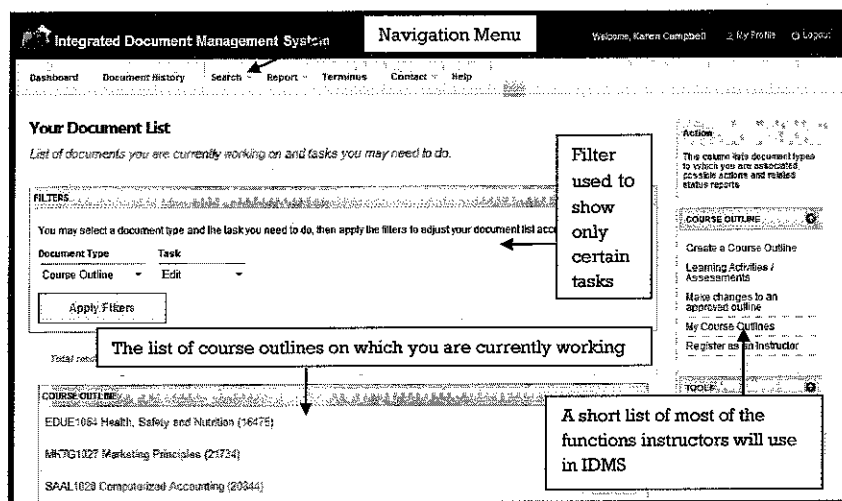


# IDMS (Integrated Document Management System)

## Course Outline Quick Reference



### IDMS Homepage



### Glossary of Terms

**Task:** The tasks available to instructors are edit, coordinate or cancel course outlines

**Edit:** task used to modify an outline in your list

**Coordinate:** task used to assign another editor or a reviewer to the outline(s) on which you are working

**Cancel:** task used to delete a course outline from your list

**Dashboard:** your IDMS homepage

### Fundamentals of Creating Course Outlines on IDMS

#### Step 1 - Registering as an instructor

Please note that the Head of the department to which you have registered is the one who will approve every course outline you will submit.

**NEW INSTRUCTORS ONLY!** From your homepage, under **Actions**, click the Register as an Instructor hyperlink to navigate to the **Instructor Management** screen.

1. Under **College**, using the drop-down menu, select the college to which you are associated
2. Under **Campus**, using the drop-down menu, select the campus to which you are associated
3. Under **Department**, using the drop-down menu, select your department
4. Click on **Save** to confirm your registration as an instructor.

#### Tips:

• If for any reason a course outline needs to be approved by the head of another department, simply change the department in the course outline editor itself

#### Step 2 - Creating a Course outline

From your home page, under **Actions**, click the Create a Course Outline hyperlink to navigate to the **Document Creator** screen.

1. With the help of the radio button, select if your course outline is attached to a specific program. If the answer is **yes**, click ☒ Yes
  2. Indicate the year in which the students taking this course entered (or will enter) their program
  3. Enter the program name (example: Business Administration)
  4. Find the appropriate program in the generated list (it will appear on the bottom of the screen) and click the blue arrow in that row
  5. Scroll further down and find the appropriate course title and click the **New** icon OR the **Copy** icon
  6. Scroll further down and find the appropriate course outline and click the **New** or **Copy** icon
- Clicking **COPY** is the same as creating a course outline since you are going to create a modifiable copy. It will include the original activities & assessment items etc. but they can be changed.*

#### Tips:

• An example of when one would choose 'No' would be if you are teaching a non-program specific elective

• Typing a partial program name actually yields better results

#### Step 3 - Editing a Course Outline

From your home page, click the task button in the row for the outline you wish to edit and choose 'Edit'

##### Tab: Course Information

1. By default, the **Course Information** tab is selected. Nothing can be edited in this tab because the information is coming from the course profile.

##### Tab: Delivery

1. Select the **Delivery** tab.
2. Select the term. When you select a term, the period of delivery is automatically adjusted to match. You can still change the delivery period using the calendars under **Period of Delivery**.
3. Select the appropriate campus and department.
4. Select the delivery mode.  
**Enter in the appropriate fields:**
  1. The classroom number;
  2. The course schedule;
  3. The required resources (If no resources are required, enter *None*).
  4. Click on **Save** to save your changes.


#### Tips:

• The following information is not editable: the course title; the course code; the effective date; the SIMS code

The course outline number appears at the top of the screen. This unique number is automatically generated by the system and cannot be changed


**Tab: Delivery continued...**

**Adding a program or Deleting a program**

1. Retain the default program or delete it by clicking 
2. If you wish to add a completely different program, click **Add another program**
3. Choose the program from the drop down list and click **Add**


*As the creator of the course outline you are already listed as an instructor*

**Adding an instructor**

1. Click on **add another college instructor** to add a new instructor.
2. Click the **Instructor** icon  and type in the NBCC email of the instructor you wish to add.
3. Enter his or her information in the appropriate fields.
4. Click on **add** to add the instructor or click on **cancel** to return back to the course outline editor.

*The Availability is a required field; however, Phone and Room are optional.*

**Editing an instructor's information**


1. Click the **sheet with the pencil**  next to the instructor you wish to edit.
2. Make the required changes then click on **save** to confirm the changes or **cancel** to cancel.


**Tab: Competencies**

1. Select the **Competencies** tab. *Your course outline inherits the general and specific competencies of the course. Therefore, these competencies cannot be deleted or modified, but only displaced.*


**Tab: Activities and Assessments**

**Adding Activities & Assessments**

1. Click **Add an Activity**
2. To use Suggested Learning Activities:
  - a) Click on a top level type (red bullet)
  - b) From the sub-list, choose a specific activity (blue bullet) and click **Add**
  - c) Tick the **Weighted** box if you wish to assign a weighting (percentage of final mark) to this item and input the percentage
  - d) Click **Finish**
  - e) **Continue with a) through d) to add more activities**
3. To create Custom Learning Activities:
  - a) Click the **Custom Learning Activities** radio button
  - b) Choose a type
  - c) Type in your original learning activity name
  - d) Tick the **Weighted** box if you wish to assign a weighting (percentage of final mark) to this item
  - e) Click **Add**
4. **Once your activity list has been created, click the Details icon**  **to type in meaningful explanations for each activity.**

*At any time, click the  icon at the top right of your screen to preview the content of your course outline so far.*


**Editing Activities & Assessments**

1. Click the pencil and paper icon  in the row of the activity you wish to edit
2. Make the necessary changes. Click on the **Save** button to save or click on the **Cancel** button to cancel.


**Moving Activities & Assessments**

1. Click the up or down arrows  in the **Order** column to change the order of the activity

**Deleting Activities & Assessments**

1. Click the delete icon  in the row relating to the activity you wish to delete.


**Tab: Bibliography**

1. Select the **Bibliography** tab and click **Add a bibliographical reference.**
2. Choose the Reference type.
3. Enter the document information in the appropriate fields.
4. When you are done click on **Save basic information** to add the reference.
5. Click the pencil and paper icon  to add the author information.
6. Click **SAVE** at the bottom of the screen.

**Tab: Appendices**

1. Select the **Appendices** tab and click on **Add an appendix.**
2. Enter a meaningful title for the appendix (description is optional)
3. **Browse** for the file you wish to attach
4. Click the **Add** button to add the appendix


**Editing an appendix**

1. Click on the **sheet with a pencil**  next to the appendix you wish to edit;
2. Make necessary changes; Click the **Save** button to save or the **Cancel** button to cancel your changes.

**Deleting an appendix** Click on the minus with a red circle  next to the appendix you wish to delete.

#### Step 4 - Sending a Course Outline for Approval




When you are satisfied with the completion of steps 1 through 3, click the **Approval Request**

button  found at the bottom of the screen

#### Other Course Outline Options

##### Updating a previously approved course outline

From your homepage, in the **Actions** section, click [make changes to an approved outline](#)

1. Choose the appropriate term from the *Session* drop down list.
2. Choose the appropriate course code prefix from the *Subject Area* drop down list.
3. Type in the name of the course in the *Document Title* text box.
4. Click Search & wait for a list to appear.
5. Click the blue arrow  next to the outline you wish to update.
6. Click the Assign as Editor icon  and type in your nbcc email, and click search to find yourself in the system
7. Click the blue arrow  next to your name so that you will be re-assigned as an editor for this course outline.
8. Type an explanation to your Department Head in the Change Request Description box.
9. Click Initiate Change Request – you should now see the course outline listed on your homepage/dashboard again

*A course outline can be updated if the delivery has not yet begun or before it is completed. When the period of delivery of a course outline is passed, the course outline is no longer editable. It is possible to copy and modify it for another delivery (see [Creating/Copying a Course Outline](#)).*

Once these steps are done, it is now possible to edit a course outline previously approved.




##### Deleting a course outline from your list (cancel process of a course outline)

From your home page, in your course outline **List**, click Tasks button  and choose Cancel.

1. To cancel a course outline, click on **Cancel change request** at the end of the page.
2. Type a message to your Department Head in the 'Justification for the cancellation of the change request' textbox (such as...*No longer teaching this course*)
3. Click 'Cancel Change Request' and this course outline should be deleted from your **List**.



##### Searching for other instructors course outlines

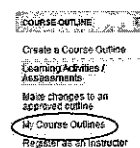
From your homepage, click the  in your navigation menu at the top of your screen.

1. Click Course Outlines in the drop down menu
2. Type in the course code (no spaces) in the **Code:** textbox & click Search
3. Wait for the course to appear at the bottom of the screen then click the *Details* button 
4. Wait for the course outline list to appear at the bottom of the screen, then click the blue arrow  in the row where *Status* shows *Active*
5. Wait (again) and a list of all the active course outlines in the system will appear.
6. Click the Send by Email icon  to send yourself a copy OR click the blue number in the first column to view a copy

*To search for your own course outlines that have been approved, choose **My Course Outlines** in step 1.*

##### Email yourself a course outline and post to Blackboard

1. Click *My Course Outlines*
2. Find the appropriate outline and click the *Send by Email* icon 
3. Go to Microsoft Outlook and look in your inbox for the email with the attached course outline pdf files
4. Right-click on one of the attached files (one is in colour, one is black and white) and choose *Save As*. Save this file to a memorable location on your computer.
5. Go to the appropriate course on Blackboard
6. From the course homepage, click *Build Content* and choose *Syllabus*
7. Type an appropriate Syllabus Name
8. Click  Use Existing File
9. Find and highlight the course outline pdf file that you saved in step 4, then click OPEN
10. Click SUBMIT



Please contact [karen.campbell@nbcc.ca](mailto:karen.campbell@nbcc.ca) if you would like to see additional information included or any changes made to this document.