# **Approving Proposals in CourseLeaf**

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## **Reviewing Course and Program Proposals**

If you are an approver listed in the workflow for a change proposal to a course or program, or a bundle of changes to courses and/or programs, you will receive an email to approve the proposal or bundle and a link to navigate to Approve Pages console (<u>https://next.catalog.utsa.edu/courseleaf/approve/</u>).

The email will appear as below from <u>utsa@notify.courseleaf.com</u>. The subject line will specify "[CIM Programs] Review Request:" or "[CIM Courses] Review Request:" then it will specify the role you are assigned to. The link embedded in the email is safe and will navigate you to the Approve Pages site.

F	i 4/7/2023 8:46 AM							
C	CourseLeaf <utsa@notify.courseleaf.com></utsa@notify.courseleaf.com>							
	XTERNAL] [CIM Programs] Review Request: Catalog Editor							
To CatalogEditor	CatalogEditor							
• We removed ext	ra line breaks from this message.							
**EXTERN/ This email Please exe	AL EMAIL** originated outside of The University of Texas at San Antonio. rcise caution when clicking on links or opening attachments.							
CatalogEdito	r:							
There are pe	nding academic program change proposals awaiting your review, including							
454: BA - Af	rican American Studies.							
Please Visit:	m11 safalinks protection outlook com/2url=https%34%2F%2Fpayt satalog utsa adu%2Fsoursalaaf%2Fapprove%2F%3Frala%							
3DCatalog%	2520Editor&data=05%7C01%7CCatalonEditor%40utsa.edu%7C69ed105e4c7247cf83bd08db376e73c7%							
7C3a228dfb	c64744cb88357b20617fc906%7C0%7C0%7C638164719751913398%7CUnknown%							
7CTWFpbGZ	sb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%							
<u>7C&amp;sdata=j</u>	2eCwQteLmHhkLwnzb%2FhGC3LhakFaPDrcAtz3vxqFG4%3D&reserved=0							
to review an	d approve the changes and provide your feedback.							
For question	s or information regarding this email, please reply to this email ( <u>academicprograms@utsa.edu</u> ).							
Thank you.								
Academic	Program Manager, UTSA							

To review proposals assigned to you for approval in the workflow at any time, navigate to the Approve Pages console (<u>https://next.catalog.utsa.edu/courseleaf/approve/</u>) to approve, rollback, edit, or view workflow status. Make sure "your role" is set to the role that corresponds with the step of the workflow. **Note:** courses, programs, and itemized bundles will appear in this list. If more than one person is assigned to a workflow role, either person can approve the course or program. Make sure to communicate with the role sharer as to which courses and programs can be or have been approved and by whom. Once an approver within a shared role has approved the proposal, it will be sent to the next approver and the other member of the shared role won't be able to review and approve the proposal.

Step 1: Once you have navigated to Approve Pages (<u>https://next.catalog.utsa.edu/courseleaf/approve/</u>), select your role from the "Pages" section on the left-side of the screen, then select the relevant proposal.

Pages	BU Associate 🗸 🗸	<b>▼</b> C*	Î
PAGE	USER		
/programadmin/72	: 72: BBA - Marketing	Henry Shu	

Step 2: The "page review" section on the right-side of the screen will show the proposal information and the workflow. If the proposal is bundled, it will show the bundle information. The type of proposal will be specified at the top of the "page review." Make sure to click into each proposal in the bundle list to approve or roll back.

Page Review	VIEW CHANGES BY: All Changes	<ul> <li>HIDE</li> <li>CHANGES</li> </ul>	NEXT STEPS					
UTSA The Universe at San Anto	UTSA The University of Texas at San Antonio <sup>™</sup>							
Course Change Request								
Export to PDF <u></u> Export to Word <u></u>	Course	Acc Courses 😋						
Shred Proposal	<ul> <li>ACC 3033: II</li> <li>ACC 3113: A</li> <li>ACC 3123: C</li> </ul>	Intermediate Accounting II <u>Accounting Information Syster</u> <u>Cost Analysis</u>	ms 🐼 🛿 In Workflow 1. Catalog Editor					

Step 3: Edit, rollback, or approve the proposal (shown in order below).



## Approving Proposals



Selecting "approve" will send a proposal to the next person in the workflow for further approval.

<u>If you share a role:</u> Ensure to communicate with any role sharers (if any) which courses and programs can be or have been approved and by whom. Once an approver within a shared role has approved the proposal, it will be sent to the next role in the workflow and the other member of the shared role won't be able to review and approve the proposal.

<u>If you are the approver for two roles:</u> Please expect an email each time a proposal is sent to you. Some approvers will approve for two back-to-back roles. You will need to refresh your "Pages" queue to view the next role from the drop-down menu and re-approve the proposal.

Pages	LF Associate Dean of UG S 🗸	•	C
PAGE		USER	

#### **Approving Bundles**

Bundled proposal emails will look like you are approving just one course or program (see screenshots above for reference). That course or program will be just one of the courses and/or programs in the bundle. The link in the email is safe and will navigate to the Approve Pages console

(https://next.catalog.utsa.edu/courseleaf/approve/). You will then see a table of contents area at the top of the

"page review" section that lists all of the assigned proposals in the bundle and links to those proposals. This allows the reviewer to easily view all assigned proposals. Reviewers must view all proposals before approving. You can keep track of the ones you have viewed with the eye icon. If the eye icon has a slash through it, then you haven't reviewed that proposal.

AHC Bundle 🚦				
Course				
• AHC 4113: Contemporary Art 🐼 😣				
<ul> <li>AHC 4333: Topics in Art History and Criticism 8</li> </ul>				

Reviewers will get an error message if all proposals have not been viewed.



When you approve a bundle, only the first proposal in the "Pages" section will disappear, all other proposals will still be listed. Select the "refresh" button to ensure all proposals at your step have been approved. If not other proposals remain, then the role will not be an option in the drop-down menu.

Pages	BU Associate Dean of 💙	T C

#### Synchronization

When a bundle reaches the Banner or final Catalog Editor workflow step, the bundle is broken for migration to Banner and integration into the catalog. Once a course or program is bundled, the workflow stays merged even if it's unbundled at a point in the workflow. Once all of the bundled records are at rest again or taken out of the workflow, the courses and programs can be edited independently from one another or re-bundled in different ways. The approval history of the bundle will be saved.

### **Editing Proposals**



Selecting "edit" will allow you to make further changes on the proposal. The proposal information will pop up in a separate window to make any edits. Once all edits are made, select "save changes," then either roll back or approve the changes.

## Sending Back Proposals



Selecting "rollback" will send it back to any previous person or role in the workflow. Select which person/role you would like to roll it back to, add comments (required), and then click "rollback." Selecting the person who initiated the proposal (first name on the list) will take the proposal out of the workflow and break a bundle.

Rollback Page
Rollback to:
Linda Vaello Initiator
Catalog Editor
ACCT UG Curriculum Committee Chair
ACCT Chair
BU UG Curriculum Committee Chair
Comment/Reason:
ROLLBACK CANCEL

#### **Rolling Back Bundles**

When a reviewer rolls back a proposal in a bundle to an approver step, the entire bundle is rolled back. If sent back to the initiator, the bundle will break.

If an entire bundle needs to be sent back to the initiator, take note of all proposals in the bundle. If a proposal needs to be removed from the bundle, email <u>CatalogEditor@utsa.edu</u>.

## **CourseLeaf Dashboard**

The CourseLeaf Dashboard is a helpful site for navigating to the different modules of CourseLeaf and approving catalog pages and proposals. You can access the Dashboard via the two links below:

- Primary Dashboard link: <u>https://next.catalog.utsa.edu/admin/dashboard/</u>
- The former main catalog page link: <u>https://next.catalog.utsa.edu/</u>

### Navigating the Dashboard

• An "Approve Changes" tab at the top of the Dashboard will navigate you to the Approve Pages site: <u>https://next.catalog.utsa.edu/courseleaf/approve/</u>. It will create a new tab in your browser.

Configure Content					
Approve Changes			Edit Programs		
Change University Core			Submit Agreements		
ITEMS	WORKFLOW 27				
Types	My Items		~		

• The "Items" tab at the lower part of the Dashboard will list and provide the status of all Catalog Pages where you are listed as a page owner, all program and course proposals you have initiated, and all Classroom Scheduling course proposals you have initiated. Selecting a page or proposal from this list will create a new tab in your browser, navigating you to the relevant page or proposal.

ITEMS	WORKFLOW					
Types	My Items 🗸					
	0 New	1060 In Progress	1 Pending	<b>1950</b> Done		
Pages in Process: Pending						
Page Tit	le	Раде Туре	Current User(s)	Last Activity		
429: PHI	D - Community and Policy	Edit Programs	SACSCOC Accreditation Liaison	Oct 1, 2024		

• The "Types" drop-down menu will show the list of different areas of CourseLeaf and works as a sorting feature.

ITEMS	WORKFLOW
Types	Graduate Catalog Pages
	My Items
	Student Policies
	Graduate Catalog Pages
Pages i	Undergraduate Catalog Pages
	Shared Pages
Page Ti	All Pages
Departr	CLSS - Summer 2022

• The "Workflow" tab will list any proposals pending your approval. This section auto-filters the roles you are assigned to which can be narrowed down by selecting "X" to remove the role. It includes three drop-down menus which help filter the Workflow list.

ITEMS	WORKFLOW 25						
Role		Туре		Term			
My ro	bles	<ul> <li>Any Type</li> </ul>	\$	Any Term	\$		
Filters	Applied: × roles: BU Associate Dean of UG Studies	x roles: CLSS 0490 A-D	Dean X roles: CLSS ACCT A-Dean X roles: CLSS MGMT A-Dean X roles: CLSS MGMT A-Dean X roles: CLSS MGMT A-Dean	X roles: CLSS ACCT DUS	X roles: CLSS ECON A-Dean X roles: CLSS ECON A-Dean X roles: CLSS ECON A-Dean X roles: CLS	oles: CLSS ECON DUS × ro	les: CLSS FINC A-Dean
×roles	: CLSS MSST DUS ×roles: Mark Leung	(10103. 0200 1000 D00	Alloca, dead month A bean and		Aroles, of the aroles		
_							
Page T	itle	Туре	Term	Submitter	Approver	Submitted	Modified
057.00		5 /12 O	E-11 0000 (0000 00 1			0 1 0 0 0005	

• The "Role" drop-down menu lists all roles with proposals assigned but auto-filters only the roles you are assigned to with "My roles."

Role	
My roles	÷
My roles	4
Any Role	
AVP Accreditation and Academic Programs	
Academic Affairs	
Academic Affairs Financial Lead	
Academic Council Approval	
Associate Dean of Strategic Partnerships	
Associate Vice Provost	l
BU Associate Dean of UG Studies	

• The "Type" drop-down menu lists the various types of proposals for filtering so you can view only programs or only courses. The names of the areas correlate with the tabs at the top-section of the Dashboard site.

	Any Type	\$
ſ	Апу Туре	
25	Change University Core	
55	Classroom Scheduling	
	Edit Catalog Pages	
	Edit Courses	
e	Edit Programs	
	Edit Programs (To Do)	
	Submit Agreements	
	Submit Agreements (To Do)	

• The "Term" drop-down menu lists the terms pending approval in the workflow so you can filter proposals by when the changes take effect.

	Term	
ſ	Any Term	;
	Any Term	
	2023-2024	
t C	2024-2025	
	2025-2026	Ĩ
	2026-2027	
	Fall 2024 (2024-26 Undergrad Catalog)	
	Fall 2025 (2025-27 Grad Catalog)	
	Fall 2026 (2026-28 Undergrad Catalog)	
	Spring 2025	
	n/a	

### Reviewing Proposals on the Dashboard

• To approve a proposal on the Dashboard, navigate to the Workflow tab, make sure the relevant roles, type, and/or term are selected. Then click a "Page Title." This will pop-up a window within your browser tab.

Page Title	Туре	Term
SET 3343: Event Marketing	Edit Courses	Fall 2026 (2026-28 Under

• The pop-up window replicates the "Page Review" section of Approve Pages and will show the type of proposal, the contents of a bundle if applicable, the workflow, and the red and green markup of the proposal.

i 🗄	Filter by: All Changes	
l	UTSA The University of Texas at San Antonio	
	Course Change Request	
	Export to PDF A deleted record cannot be edited Export to Word A deleted record cannot be edited Export to Word A deleted record cannot be edited Event Marketing Course prefix update Ourse • MKT 3343: Event Marketing & • SET 3343: Event Marketing Course Inactivation Proposal Date Submitted: 01/31/25 2:38 pm Viewing: SET 3343 : Event Marketing Last edit: 01/31/25 2:38 pm Changes proposed by: Henry Shu (fbt049) Justification for this Updating prefix to MKT with corresponding MKT course	In Workflow 1. Catalog Editor 2. MRKT UG Curriculum Committee Chair 3. MRKT Chair 4. BU UG Curriculum Committee Chair 5. BU Associate Dean of UG Studies 6. UG Vice Provost 7. Registrar 8. Banner

• You will be able to toggle through bundled proposals just like Approve Pages. To review other proposals, select the "X" in the top right-hand corner to exit the window and review additional proposals.

• The edit, rollback, and approve buttons will look slightly different but will work the same as Approve Pages. The rollback person/role picker will also look slightly different.

C EDIT T ROLLBACK		$\times$
Rollback Changes	×	
Rollback to		
Henry Shu		
Catalog Editor		
MRKT UG Curriculum Committee Chai	r	
MRKT Chair		
BU UG Curriculum Committee Chair	Ŧ	
Comment/Reason		

## **Reviewing University Core Proposals**

If you are an approver listed in the workflow for a University Core pr	roposal, you will receive an email
to approve the course or bundle and a link to navigate to Approve Pages cons	sole
(https://next.catalog.utsa.edu/courseleaf/approve/). The email will appear as	below from
utsa@notify.courseleaf.com. The subject line will specify "[CIM Courses] R	eview/Vote Request:" then it will
specify the role you are assigned to. The link embedded in the email is safe a	and will navigate you to the
Approve Pages site.	
From: CourseLeaf < <u>utsa@notify.courseleaf.com</u> >	
Sent: Wednesday, April 5, 2023 12:02 PM	
To:	
Subject: [EXTERNAL] [CIM Courses] Vote Request: 7: Introduction to Nutritional Sciences	
**EXTERNAL EMAIL**	
This email originated outside of The University of Texas at San Antonio.	
Please exercise caution when clicking on links or opening attachments.	
Name -	
None,	
There is a pending course change proposal awaiting your vote:	
7' Introduction to Nutritional Sciences	
Please visit:	
https://nam11.safelinks.protection.outlook.com/	
to review the changes and provide your vote.	
For questions or information regarding this email, please reply	
to this email (catalogeditor@utsa.edu).	
Thank you.	
Catalog Editor, UTSA Office of the Registrar	

Step 1: Once you have navigated to Approve Pages (<u>https://next.catalog.utsa.edu/courseleaf/approve/</u>), select your role on the "Pages" section of the window on the left-hand side of the screen, then select the core proposal.

Pages	Core Curriculum Co 🗸	<b>▼</b> C
PAGE		USER
/curriculumadmin/29:	29: History of Film I: Origins to 1950s	Paul Ardoin

Step 2: The core course proposal information and workflow will show on the right-side of the screen in the "Page Review" section. The type of proposal will be specified next to "Request Type" just under the "Linked Course" box. **Note:** All proposals, despite the request type, will show as "New Proposal" at the top.

Page Review	VIEW CHANGES BY: All Changes	HIDE CHANGES	NEXT STEPS
UTSA. The University of the Un	ersity of Texas htonio™		
Curriculum Ch	ange Request		
Changes can't be made at a	voting step.		
Date Submitted: 10/16/24 Viewing: <b>History</b> Last edit: 10/16/24 11 Changes proposed by: Paul Linked Course <u>FMS 2053: History of Fil</u>	New Prop 11:43 pm of Film I: Origins to 1 1:43 pm Ardoin (fxu429) m I: Origins to 1950s	oosal 1950s	Vote Required for Approval Do you accept the proposed changes? Ves No Abstain Comments Save View Voting Results
Request Type Ad	Id new course to the Core		In Workflow

### Deciding the Core Proposal

#### Non-voting Approvers

After reviewing the proposal, select either "Edit" to make updates, "Rollback" to send back to the previous approver, or "Approve" to send it to the next person in the workflow for further approval.



#### Voting Approvers (Core Curriculum Committee Members ONLY)

Unlike the other course and program roles, the Core Curriculum Committee Vote role allows every assigned user to decide on the core course proposal. Once you have navigated to the Approve Pages site (<u>https://next.catalog.utsa.edu/courseleaf/approve/</u>), ensure your role is set to "Core Curriculum Committee Vote" in the "Pages" section on the left-hand side.

CLSS CECM A-Dean	1		
CLSS CHEM Dean/Designee	Dagaa		
CLSS Registrar	Pages	Core Curriculum Comm 🗸	¥ C
Core Curriculum Committee vote			
David Jaffe	PAGE		USER
EH Associate Dean of UG Studies	/curriculumadmi	n/29: 29: History of Film I: Origins to 1950s	Paul Ardoin

Select your vote for (yes), against (no), or abstain on the proposal by checking the relevant box. There is an optional comment box available. Click "save" and make sure "vote saved" appears to cast your vote.

Vote Requi	red for Approval		
Do you accept the	proposed changes?		
Yes No A	bstain		
Comments			
Save View Voting Result	S		
	In Workflow	[	Vote Saved
	1. Core Curriculum Committee vote	Save	

If you change your mind about your vote, you can go back and change the vote any time before it is approved to the workflow's next step.

**Note:** You will not be able to edit, roll back, or approve the proposal. If an edit or rollback is needed, please email <u>CatalogEditor@utsa.edu</u> or <u>Mark.Appleford@utsa.edu</u>.

To view the voting results, or to see who still needs to vote, select "show voting results."

	Save	
	Hide Voting Results	
	Votes Cast:	
	Yes 100%	
	No 0%	
	Abstain 0%	
	Full Voting Results	
	User Vote	
	Araceli Ortiz Yes	
	Jasmin Paquet-	
Save	Durand Ford	
Show Voting Results	Rita Mitra	

### Editing Proposals in the Workflow

**Note**: The Core Curriculum Committee Vote role does NOT have editing access. If you are assigned to that role, please notify the department and/or initiator of any change recommendations, or add them briefly to your vote comments (see above).

Selecting "edit" will allow you to make further changes on the core course. The proposal information will pop up in a separate window. Once all edits are made, select "save changes."



## Sending Back Proposals

Selecting "rollback" will send the proposal back to any previous person in the workflow. Select which role you would like to roll it back to, add comments, and then click "rollback." If you select the first person on the list, it will take the proposal out of the workflow.

	Rollback Page
	Rollback to:
	Paul Ardoin Initiator
	EHSS UG Curriculum Committee Chair
	EHSS Chair
	LF UG Curriculum Committee Chair
	LF Associate Dean of UG Studies
	Comment/Reason:
EXT STEPS	
C O APPROVE	ROLLBACK CANCEL

## **Reviewing CLSS changes**

For more information on reviewing CLSS changes, please visit the Class Scheduling Policies and Procedures site: <u>https://www.utsa.edu/enrollment/facultystaff/registrar/ClassScheduleProcedures.html</u>. You can also contact Classroom Scheduling at <u>ClassroomScheduling@utsa.edu</u>.

## **Contact Information**

If you have any questions about the preceding procedures, please reach out to us via email or TEAMS.

## Registrar Office (Catalog and Courses):

Catalog Editor: <u>CatalogEditor@utsa.edu</u> Catalog and Course Inventory Management Information: <u>https://www.utsa.edu/enrollment/facultystaff/registrar/CatalogInformationFacultyStaff.html</u>

Shae Large <u>Shae.Large@utsa.edu</u> Registrar Officer II (210)458-7725 Schedule a meeting: <u>https://calendly.com/shae-large/one-on-one-meeting</u>

James Adair, Ph.D. James.Adair@utsa.edu Senior Assistant Registrar (210)458-6216

Classroom Scheduling (CLSS): <u>ClassroomScheduling@utsa.edu</u> Class Schedule Policies and Procedures: <u>https://www.utsa.edu/enrollment/facultystaff/registrar/ClassScheduleProcedures.html</u>

## Office of Continuous Improvement and Accreditation (Programs):

Academic Programs: <u>AcademicPrograms@utsa.edu</u> Academic Programs and Agreements Information: <u>https://provost.utsa.edu/cia/academic-programs-and-agreements/</u>

### Undergraduate Studies Office (University Core):

Mark Appleford, Ph.D.

Associate Vice Provost - Undergraduate Studies

Mark.Appleford@utsa.edu

Undergraduate.Studies@utsa.edu

(210)458-5334

Core Curriculum information: https://provost.utsa.edu/corecurriculum/