

# Approving Proposals in CourseLeaf

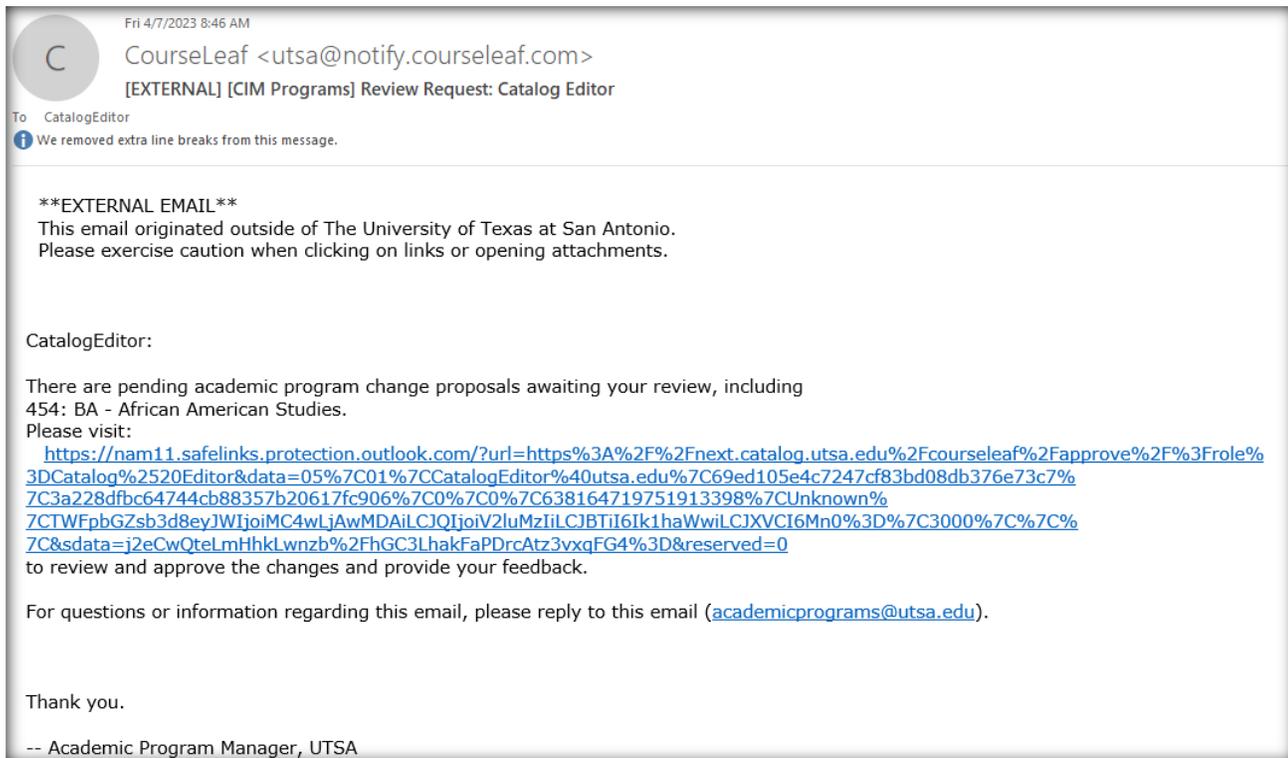
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## Reviewing Course and Program Proposals

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 (<https://next.catalog.utsa.edu/courseleaf/approve/>).

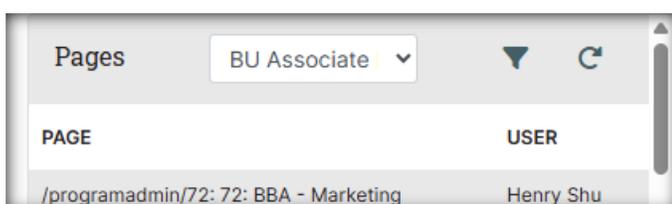
The email will appear as below from [utsa@notify.courseleaf.com](mailto:utsa@notify.courseleaf.com). The subject line will specify “[CIM Programs] Review Request:” or “[CIM Courses] Review Request:” then it will specify the role you are assigned to. The link embedded in the email is safe and will navigate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



To review proposals assigned to you for approval in the workflow at any time, navigate to the Approve Pages console (<https://next.catalog.utsa.edu/courseleaf/approve/>) 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 (<https://next.catalog.utsa.edu/courseleaf/approve/>), select your role from the “Pages” section on the left-side of the screen, then select the relevant proposal.



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.

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.

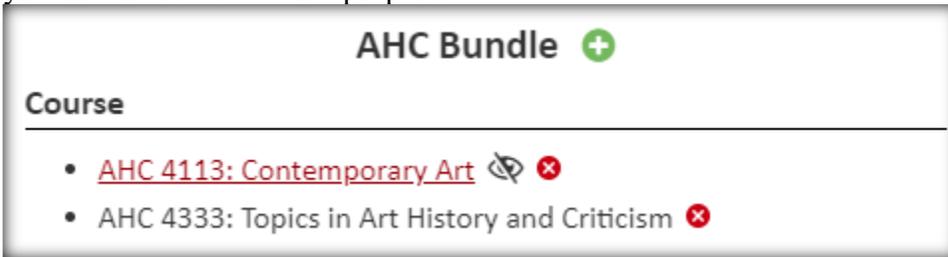
If you share a role: Ensure to communicate with any role sharers (if any) which courses and programs can be or have been approved and by whom. Once an approver within a shared role has approved the proposal, it will be sent to the next role in the workflow and the other member of the shared role won’t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

If you are the approver for two roles: 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.

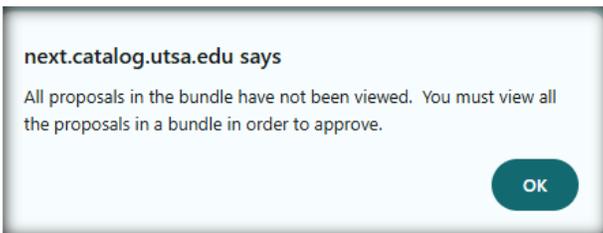
### Approving Bundles

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

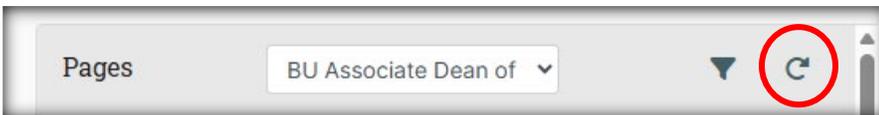
“page review” section that lists all of the assigned proposals in the bundle and links to those proposals. This allows the reviewer to easily view all assigned proposals. Reviewers must view all proposals before approving. You can keep track of the ones you have viewed with the eye icon. If the eye icon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



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



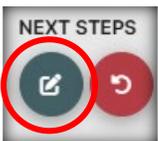
When you approve a bundle, only the first proposal in the “Pages” section will disappear, all other proposals will still be listed. Select the “refresh” button to ensure all proposals at your step have been approved. If not other proposals remain, then the role will not be an option in the drop-down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



### ***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 <b>Initiator</b>
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 [CatalogEditor@utsa.edu](mailto:CatalogEditor@utsa.edu).

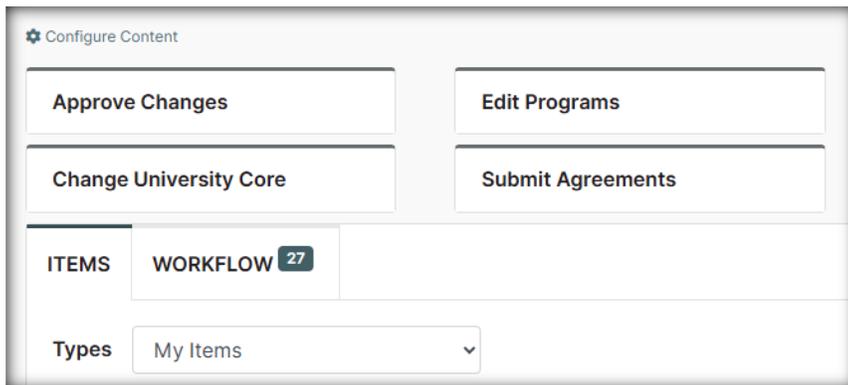
## CourseLeaf Dashboard

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:

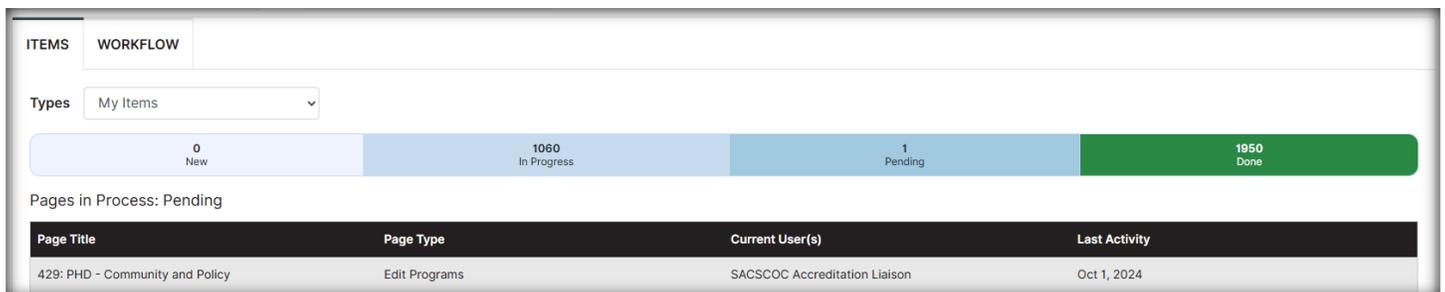
- Primary Dashboard link: <https://next.catalog.utsa.edu/admin/dashboard/>
- The former main catalog page link: <https://next.catalog.utsa.edu/>

### Navigating the Dashboard

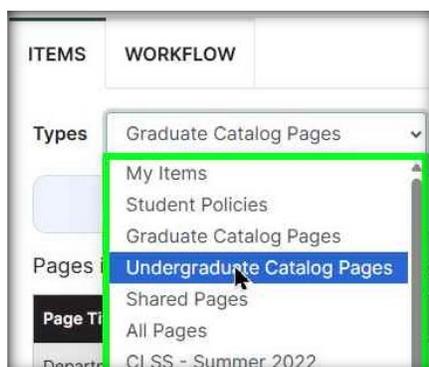
- An “Approve Changes” tab at the top of the Dashboard will navigate you to the Approve Pages site: <https://next.catalog.utsa.edu/courseleaf/approve/>. It will create a new tab in your browser.



- 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.



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



- 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.

The screenshot shows the 'WORKFLOW' tab with 25 items. It features three filter dropdowns: 'Role' (set to 'My roles'), 'Type' (set to 'Any Type'), and 'Term' (set to 'Any Term'). Below these are 'Filters Applied' tags for various roles, including 'BU Associate Dean of UG Studies' and several 'CLSS' roles. A table below lists proposals with columns for Page Title, Type, Term, Submitter, Approver, Submitted, and Modified.

Page Title	Type	Term	Submitter	Approver	Submitted	Modified
SET 3343: Event Marketing	Edit Courses	Fall 2026 (2026-28 Under...	Henry Shu	BU Associate Dean of UG ...	Jan 31, 2025	Jan 31, 2025

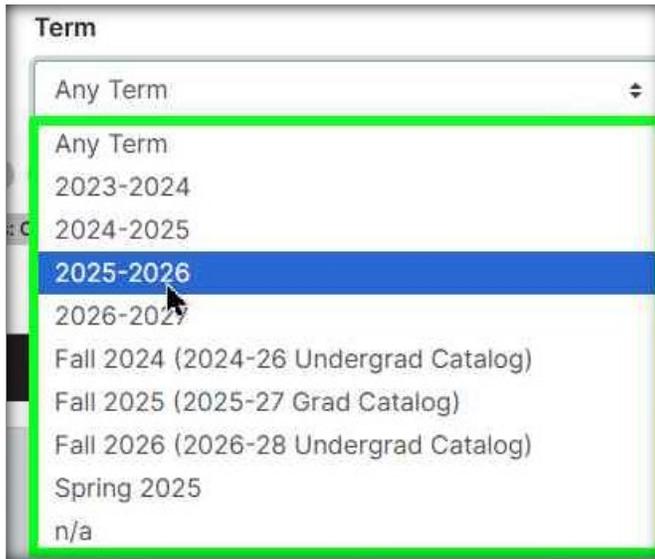
- The “Role” drop-down menu lists all roles with proposals assigned but auto-filters only the roles you are assigned to with “My roles.”

The 'Role' dropdown menu is open, showing a list of roles. The 'My roles' option is highlighted in blue at the bottom of the list. Other roles include 'Any Role', 'AVP Accreditation and Academic Programs', 'Academic Affairs', 'Academic Affairs Financial Lead', 'Academic Council Approval', 'Associate Dean of Strategic Partnerships', and 'Associate Vice Provost'.

- 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.

The 'Type' dropdown menu is open, showing a list of proposal types. The 'Edit Catalog Pages' option is highlighted in blue. Other types include 'Any Type', 'Change University Core', 'Classroom Scheduling', 'Edit Courses', 'Edit Programs', 'Edit Programs (To Do)', 'Submit Agreements', and '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.



## 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	Type	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.

- 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.

Rollback Changes

EDIT ROLLBACK APPROVE

Rollback to

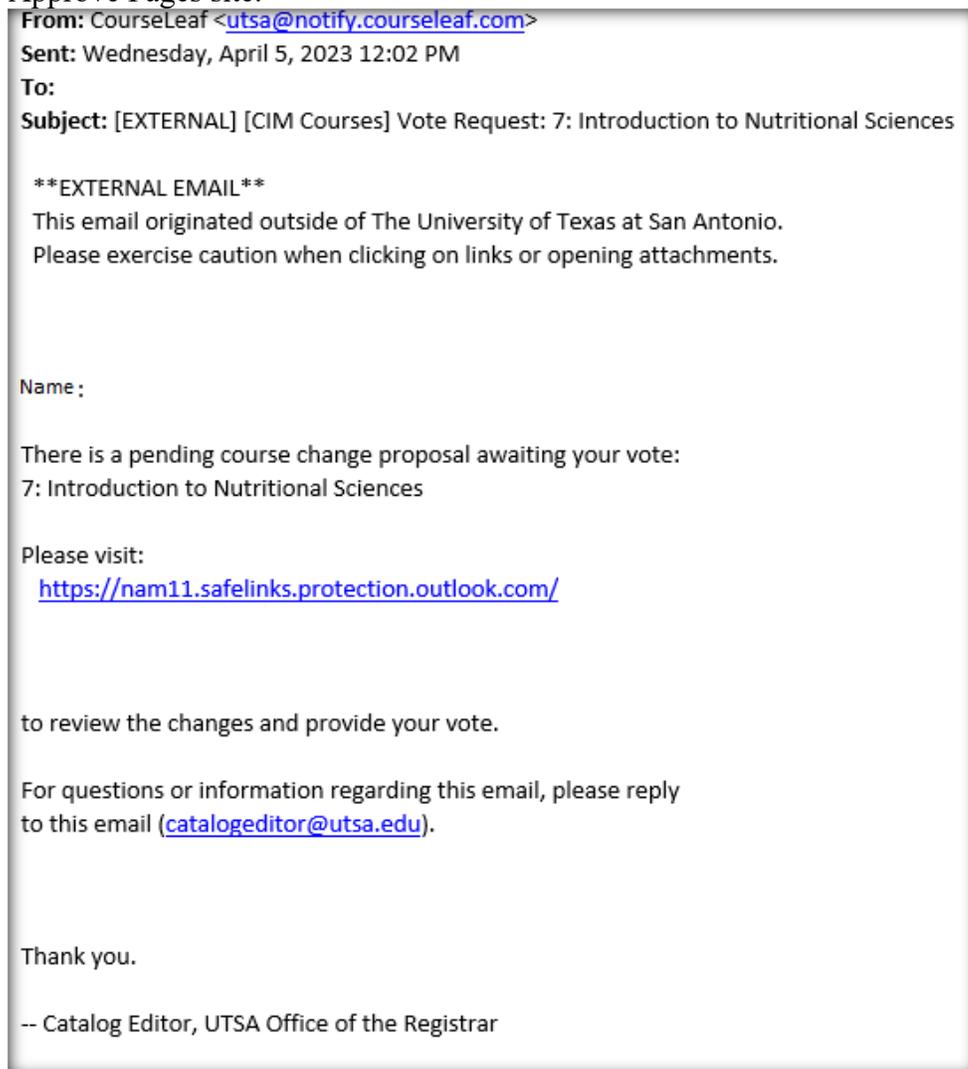
- Henry Shu
- Catalog Editor
- MRKT UG Curriculum Committee Chair
- MRKT Chair
- BU UG Curriculum Committee Chair

Comment/Reason

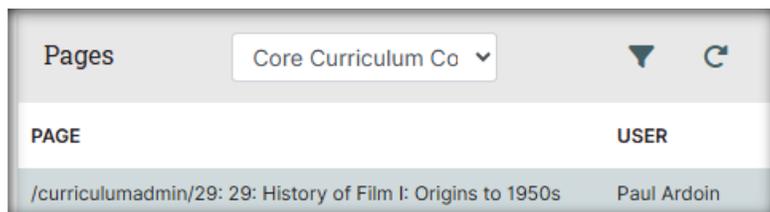
ROLLBACK

## Reviewing University Core Proposals

If you are an approver listed in the workflow for a University Core proposal, you will receive an email to approve the course or bundle and a link to navigate to Approve Pages console (<https://next.catalog.utsa.edu/courseleaf/approve/>). The email will appear as below from [utsa@notify.courseleaf.com](mailto:utsa@notify.courseleaf.com). The subject line will specify “[CIM Courses] Review/Vote 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.



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



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 Texas at San Antonio

## Curriculum Change Request

Changes can't be made at a voting step.

**New Proposal**

Date Submitted: 10/16/24 11:43 pm

Viewing: **History of Film I: Origins to 1950s**

Last edit: 10/16/24 11:43 pm

Changes proposed by: Paul Ardoin (fxu429)

Linked Course

[FMS 2053: History of Film I: Origins to 1950s](#)

Do you accept the proposed changes?

Yes  No  Abstain

Comments

Save

View Voting Results

Request Type Add new course to the Core

In Workflow

1 FHSS LIG

## 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.

NEXT STEPS

EDIT ROLLBACK APPROVE

### *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 (<https://next.catalog.utsa.edu/courseleaf/approve/>), ensure your role is set to “Core Curriculum Committee Vote” in the “Pages” section on the left-hand side.

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.

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 [CatalogEditor@utsa.edu](mailto:CatalogEditor@utsa.edu) or [Mark.Appleford@utsa.edu](mailto:Mark.Appleford@utsa.edu).

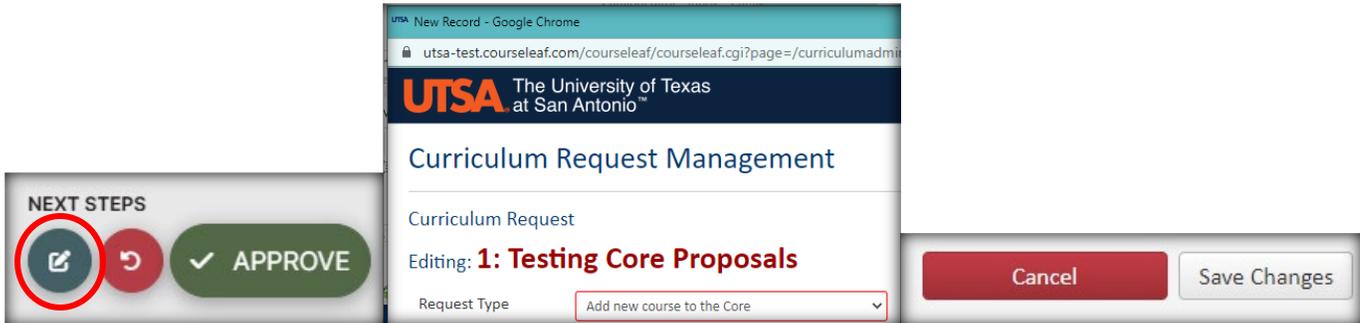
To view the voting results, or to see who still needs to vote, select “show voting results.”

User	Vote
Araceli Ortiz	Yes
Jasmin Paquet-Durand Ford	
Rita Mitra	

## Editing Proposals in the Workflow

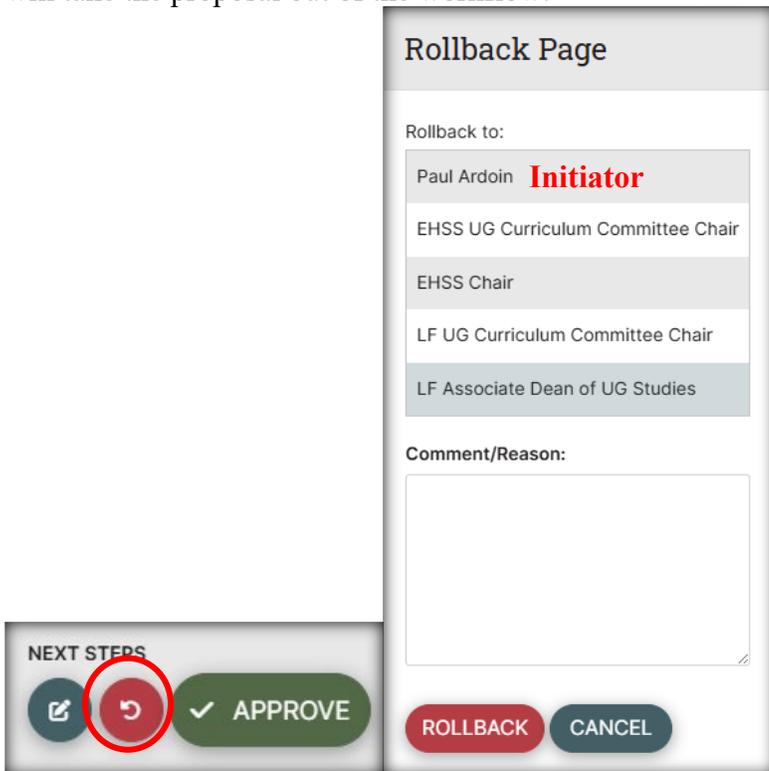
**Note:** The Core Curriculum Committee Vote role does NOT have editing access. If you are assigned to that role, please notify the department and/or initiator of any change recommendations, or add them briefly to your vote comments (see above).

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.



## **Reviewing CLSS changes**

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



## 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: [CatalogEditor@utsa.edu](mailto:CatalogEditor@utsa.edu)

Catalog and Course Inventory Management Information:

<https://www.utsa.edu/enrollment/facultystaff/registrar/CatalogInformationFacultyStaff.html>

Shae Large

[Shae.Large@utsa.edu](mailto:Shae.Large@utsa.edu)

Registrar Officer II

(210)458-7725

Schedule a meeting: <https://calendly.com/shae-large/one-on-one-meeting>

James Adair, Ph.D.

[James.Adair@utsa.edu](mailto:James.Adair@utsa.edu)

Senior Assistant Registrar

(210)458-6216

Classroom Scheduling (CLSS): [ClassroomScheduling@utsa.edu](mailto:ClassroomScheduling@utsa.edu)

Class Schedule Policies and Procedures:

<https://www.utsa.edu/enrollment/facultystaff/registrar/ClassScheduleProcedures.html>

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

Academic Programs: [AcademicPrograms@utsa.edu](mailto:AcademicPrograms@utsa.edu)

Academic Programs and Agreements Information:

<https://provost.utsa.edu/cia/academic-programs-and-agreements/>

### Undergraduate Studies Office (University Core):

Mark Appleford, Ph.D.

Associate Vice Provost – Undergraduate Studies

[Mark.Appleford@utsa.edu](mailto:Mark.Appleford@utsa.edu)

[Undergraduate.Studies@utsa.edu](mailto:Undergraduate.Studies@utsa.edu)

(210)458-5334

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