How To Use COURSELEAF

Definitions

Page Owner: First person to make changes on a catalog page. This person starts the workflow.

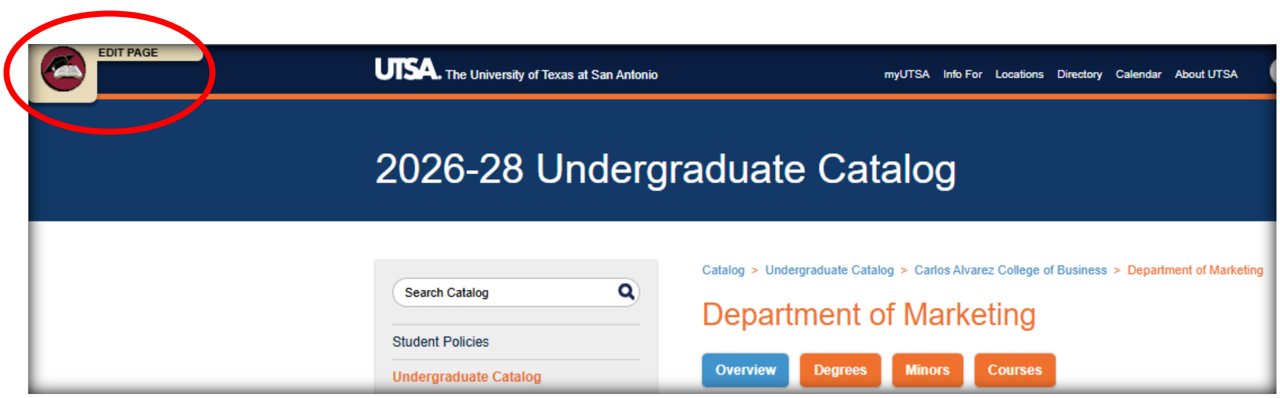
Page Approver: Reviews/approves catalog pages as part of the workflow. Site Administrators: Registrar staff.

Accessing CourseLeaf

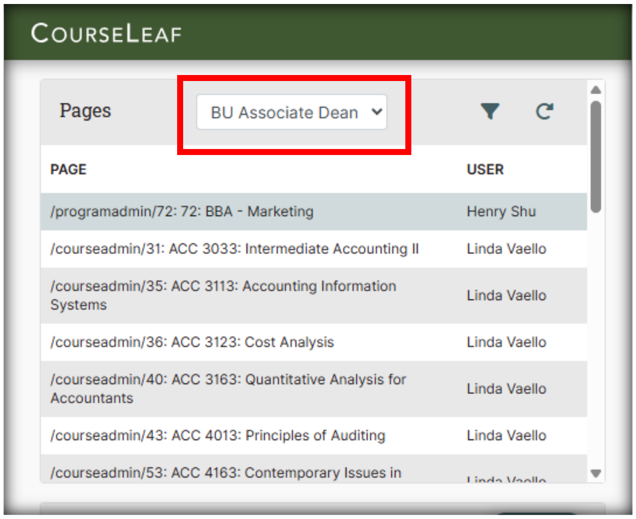
- Log in using your myUTSA ID (abc123) and passphrase. If you cannot log in or receive an error, email CatalogEditor@utsa.edu. Use Firefox or Chrome web browsers.
    - **Page owners** go to http://next.catalog.utsa.edu. Navigate to the page you want to edit/review using the left navigation.
    - **Page approvers** will receive an email requesting their review. Click on the link in the email or go to https://next.catalog.utsa.edu/courseleaf/approve/ and select your name or role in the dropdown menu to the right of "Pages Pending Approval," then select the link of the page you want to review.

To access the page you want to edit

- **Page owners,** click on the "Edit Page" tab near the top of the screen to reveal the toolbar.



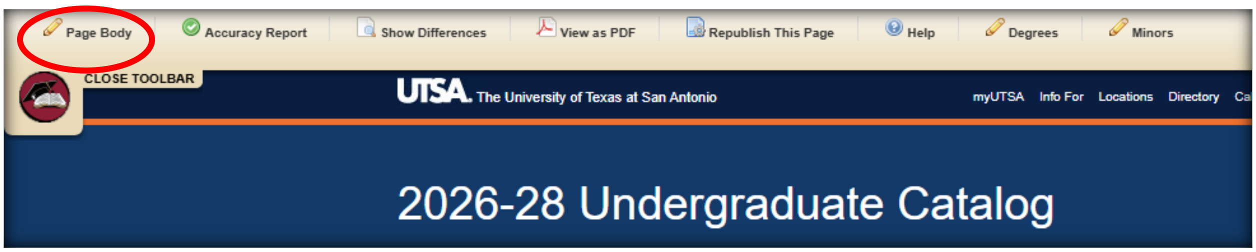
- **Page approvers,** click on the link in the email notification you received, or go to https://next.catalog.utsa.edu/courseleaf/approve/ and select your name or role in the dropdown menu at the top of "Pages," then select the link of the page you want to review.



To make changes to a page

- Click on "Edit Page" in the top left corner of the page.

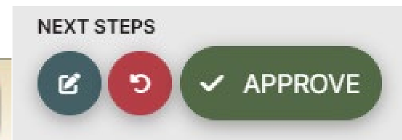
- Click on "Page Body" in the tool bar or Edit "Page Body" to the right of the page text to open the editing window.



  - If you want to edit the content on the degree, minor, or certificate tabs, click on the corresponding orange button at the top of the page and then the "Degrees," "Minors" or "Certificates" pencils on the toolbar or "Edit "Degrees"" on the right side of the text.

  - If needing to edit program content, select "Edit Program Description" or "Edit Program Requirements" within the gray area under the program name. Or navigate to https://next.catalog.utsa.edu/programadmin/.

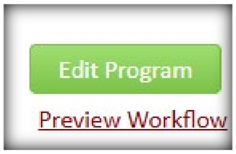
- Make changes in the respective editing window. Click "OK" when finished. NOTE: You cannot copy and paste tables from Word, Excel, etc. You must select one of the pre-defined tables (see Help in the top toolbar).
- Do not click the green "Start Workflow" or "Approve" buttons until you have made all changes to the different sections (Overview, Degrees, Minors, Certificates) for your department or program. All orange tabs visible on a page are part of that page (courses are updated in CIM: https://next.catalog.utsa.edu/courseadmin/, program content is updated on the Program Management site: https://next.catalog.utsa.edu/programadmin/).



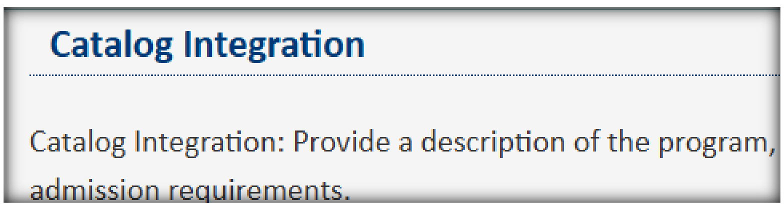
- At the bottom of the page you will see the names of the people in the workflow. If changes need to be made to the page owners, contact CatalogEditor@utsa.edu.

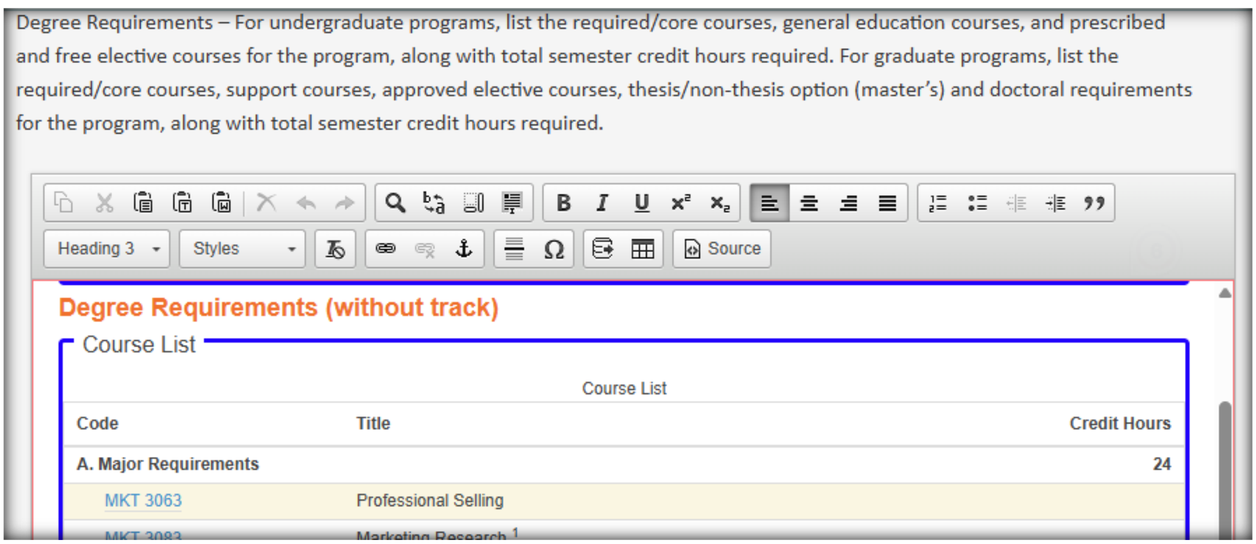
Editing Degree Requirements

- On the Program Management site (https://next.catalog.utsa.edu/programadmin/), navigate to the respective program, select "Edit Program."



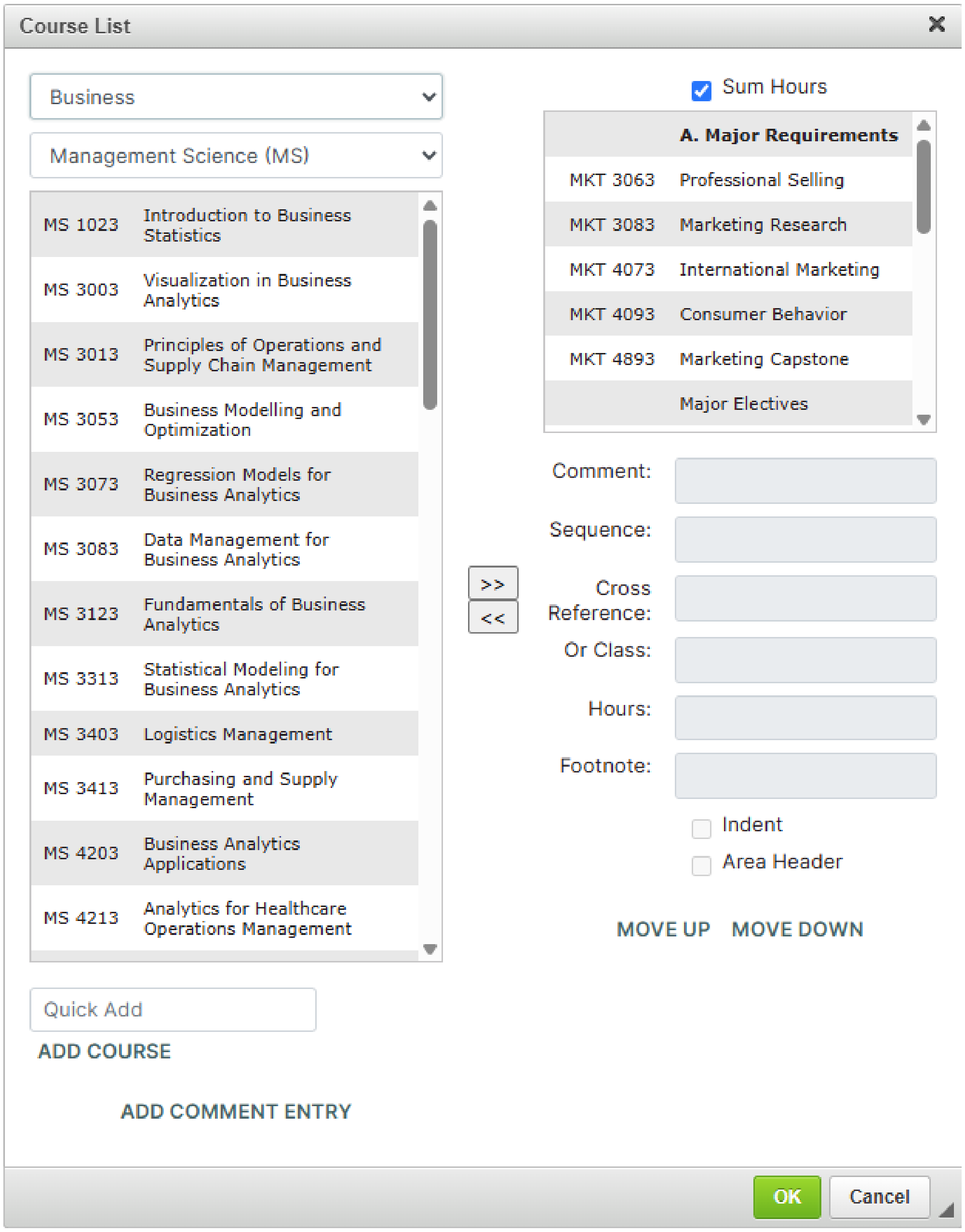
- Within the edit program window, navigate to the "Catalog Integration" section and double click on any table (or text) with a blue border, to edit the table. The name of the table type is located on the top left of each table (the example below is a "Course List").





Editing Course Lists

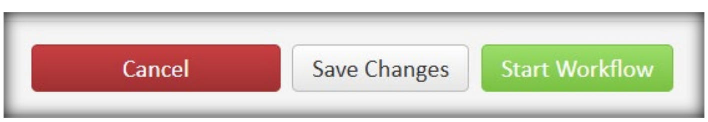
When you double-click on a course list table, a second window opens that shows all UTSA courses on the left. The courses within the Course List table you are editing will be on the right.



1. Select the correct college from the dropdown menu if you do not see the course subject you want.
2. Select the course subject you want.

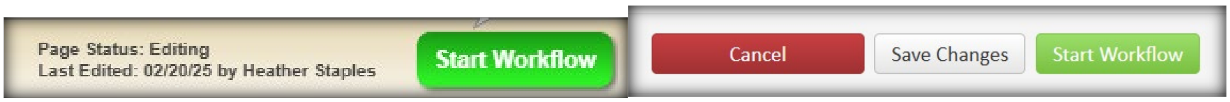
3. Select the course you want on the left and click the right arrow to add it to the degree requirements course list.
4. Add Comment Entry: Use this to add text to the table.
5. Comment: Add text you want to appear after the course title (for example, "Must be repeated for 6 credit hours")
6. Sequence: This is the same as "and" – if two courses should be taken together (such as lecture and lab), enter the second course here. Or Class: If students have a choice of more than one course to meet this requirement, enter the additional course(s) here. If more than one course, use a comma to separate courses.
7. Hours: The credit hours of the course will automatically populate this field. If the hours should be different, such as when a course should be repeated or when adding an "and" course, type in the correct credit hours.
8. Footnote: Type in footnote number. The footnote number will appear on the webpage just after the course title.
9. Indent: This will indent a course (or text) within the table. Note, indented courses are not included in the sum total of credit hours.
10. Area Header: Use with text. This will make the text bold.
11. Sum Hours: This will sum the credit hours and show the total at the bottom of the course list.

To **save** your changes, click OK, then "Save Changes" at the bottom of the editing window.

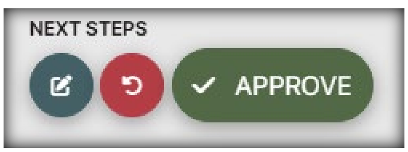


Starting Workflow/Approval of Pages

- When a user clicks "Start Workflow," the page or program goes to the first approver in the workflow and can no longer be edited by general users. The approvers in the workflow will receive an email notifying them of the page(s) pending their review/approval.



- When the approver clicks "Approve," the page moves to the next person/role in the workflow and cannot be edited by anyone other than that person. The next person in the workflow will receive an email notifying them of the page(s) pending their review/approval.



There are detailed procedure manuals on our website: https://www.utsa.edu/enrollment/facultystaff/registrar/CatalogInformationFacultyStaff.html. If you need additional help, contact CatalogEditor@utsa.edu.