

COURSELEAF – APPROVE OR MODIFY CATALOG PAGES FOR THE UPCOMING YEAR’S CATALOG

EXPLANATION

Each year the catalog pages of the current year’s catalog are reviewed and appropriate changes made for the upcoming year. All pages must be approved by their respective “owners”. For academic departments, the “owner” is the Chair of the department.

There are several stages in the approval process. The following offices see the page and approve it before it is included in the upcoming year’s catalog.

- The Department Chair
- Catalog Editor (edits for style and consistency across the entire catalog)
- The Dean’s Office
- The Curriculum Committee (if there are changes to the Major/Minor requirements or Honors)
- The Catalog Manager

As each owner or stakeholder approves the current page or the modified content, the page works its way through the workflow process to become part of the upcoming year’s catalog. The changes you make to this “future” catalog are reflected only in the upcoming year’s catalog. No changes that you make will impact our current year’s catalog.

VIEWING PAGES AND ACTING ON THEM

You will soon receive an automated email with the subject "[Catalog] Review, update, approve: {Your catalog page name here}."

- **Follow the link** in that email to see the catalog pages that you are responsible for reviewing.
- **Log in** with your lclark email username and password.
- **You will very likely end up on a page that is *blank*.** To see your department’s catalog page, change your “personal **role**” to the role listed on the email you received. It will likely be “U XXX Chair” or “U XXX Program Director”, where XXX is your department.
- You’ll see your role in the email you receive, at the end of the link to the catalog.

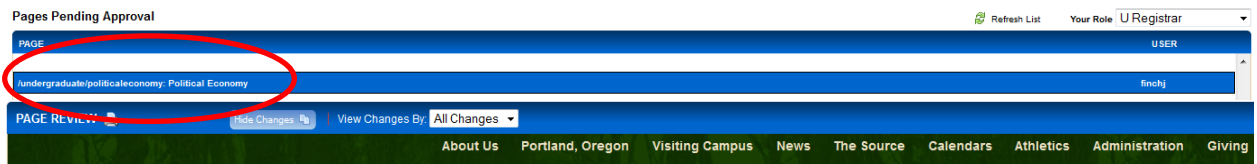
Example:

http://future-docs.lclark.edu/courseleaf/approve/?role=U_HIST Chair

- From the drop down menu next to “Your Role”, choose the correct role as specified in the email.

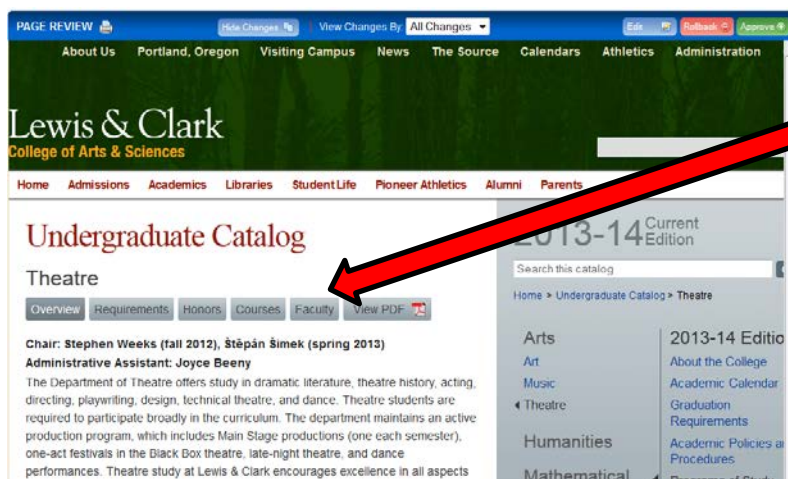


Once you change the role, you'll see pages in your queue.



Click on the page you wish to view and the details will be displayed below.

You will see the catalog page as it normally appears in the online catalog.



There are **tabs** which give a department overview, describe the requirements, describe honors, list the courses and list the faculty.

You can change information on any of the tabs except the faculty tab (Debbie Richman does that) or the Courses tab (that's automated based on the courses that have been approved by the CC).

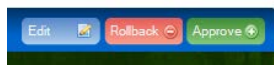
The text on catalog pages appears in black. Catalog pages that have been edited will show changes in red and green mark-up.

- Red indicates deletions of text.
- Green indicates additions of text.

You can view changes made by particular individuals by using the drop-down arrow on the Page Review bar.



HOW TO TAKE ACTION:



Page needs no modification:

If the page meets with your approval and no changes are necessary, you can click on the green “**Approve**” action button and the proposal will be moved to the next step in the workflow. The owner of that role will be notified by email.

Page needs to be modified:

Please note that the Curriculum Committee will need to approve any changes to the requirements or honors sections. Adding a course to the requirements when the course has already been approved by the CC does not need any further approval and will be done automatically. You should see newly approved courses already in your listings when you receive the email prompt to view your page. If courses have not yet been approved, they will not yet be included, but will appear before the catalog is published.

WHAT YOU MAY EDIT

- The Overview Tab. This overview page is a general introduction to your The overview tab is mostly text and the editing is fairly straightforward – see instructions under the “How to edit...” section below.
- The Honors Tab. Note that any changes must be approved by the curriculum committee and only apply going forward to students entering in future catalog years.

WHAT YOU CAN EDIT – BUT I ASK YOU NOT TO DO SO

- The Requirements tab. Editing the courses required is NOT intuitive for most users. If you make a misstep, it can entirely wipe out the tables that hold the course lists, or cause them to behave erratically (especially if you try to paste any items), and your entire catalog page will have to be rebuilt from scratch. *Moreover, changes to the requirements (unless just adding/deleting a course from an **existing** requirement) would require CC approval and such proposals were due the prior December.*
- If you need to make changes to the requirements page, please do the following:
 - Use the VIEW AS PDF button in the editing toolbar to create a pdf of your current page. Mark it up with red ink and send to me. Or – if your changes are extensive, feel free to submit a new document to Judy Finch with the changes you’d like to see.
 - Provide a rationale for the change. This will be placed it on the Curriculum Committee’s agenda for approval.
- Same goes for the Honor’s tab. Provide the changes and a rationale to Judy Finch and the CC will review the proposed changes.

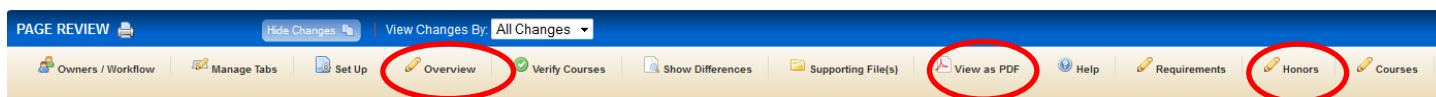
WHAT YOU CAN’T CHANGE

- Faculty information. Only Debbie Richman can change the information included on the Faculty tab. Contact her if changes need to be made.
- The Courses tab. The courses tab is automatically compiled from courses that have been approved by the CC. If you are not seeing a course here that you believe should be here, it may not have yet completed the workflow. Let me know if you believe that there is an error.

HOW TO EDIT THE OVERVIEW TAB

If you wish to edit the overview tab (or section) of your catalog page:

- Click on the blue “Edit” button. 
- A Tan toolbar will drop down.



- In that toolbar area, click on the “Overview” button with the pencil icon to make changes to the **Overview** section, or click on the “Honors” button to make changes to the **Honors** section.
 - A new window will open and you can make changes just as you would with a word processing application. When you are done, click on the “OK” button and the window will close. Your changes will be saved to the catalog page and show in red/green edit markup.
 - If you want to see how the page will look in the finished catalog, you can click on the “VIEW AS PDF” button in the **tan edit area** (not down below on the page itself).
- To change text in the Requirements section:
 - When you’re done with making changes to all of the text in relevant sections, you can click on the **VIEW AS PDF** button up in the tan edit section (not down below on the page) and it will show your revisions. You can print that and make changes and/or additions using red ink. Forward the printout to Judy Finch, and it will be posted for the CC to review.
 - Alternately, you can submit a new document with the changes you’d like to see.
 - Or, you can contact Judy Finch and she’ll arrange a time to go over this process with you so that you can do it yourself.

Please note that if you are making a change to the requirements or honors, you should separately send the rationale for the change to Judy Finch. That rationale and the proposed changes to the major/minor/honors will be given to the Curriculum Committee for approval. The committee will contact you if there are questions.

SAVING YOUR CHANGES AND SUBMITTING THE PAGE TO WORKFLOW

When you’re done with making changes to all of the relevant sections, you can click on the green “APPROVE” button and the page will be moved forward in the workflow. If other stakeholders make changes, or new courses are approved, you will see the page again to give your final approval.

WHERE IS YOUR CATALOG PAGE IN THE WORKFLOW?

You can view where the page is in the workflow and track the progress of your department/program’s page by viewing the workflow and status. Click on the “Workflow Status” tab on the right hand side of the screen. (See image next page). The *Completed* section will show who has already seen and approved the page, and the *Pending* section will show the queue in which it resides currently, and where it will go from there.

PAGE	USER
/undergraduate/politicaleconomy: Political Economy	finchj

Completed:

finchj, U Registrar, marty, U Registrar, U Catalog Editor, U POLE Coordinator, U Registrar

Pending:

U Registrar, U Catalog Editor, U Catalog Manager

Update Pending Workflow

QUESTIONS?

Contact Judy Finch at x7328 or finchj@lclark.edu.