Pages Pending Approval

Companion Guide

Companion Guide for CourseLeaf Software’s Pages Pending Approval
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Summary

This companion guide will walk users through how to use CourseLeaf's Pages Pending Approval workflow queue. General and specific information for Catalog (CAT and CIM Program Editing), Course Proposal Forms (CIM Courses), and Academic Structure (CIM Programs).

Related SOPs and Companion Guides

- CU Denver Registrar Office CAT Training Guide
- UCC CourseLeaf SOP
- How to Fill Out a Course Proposal (CIM)
- How to Propose and Edit to an Existing Course (CIM)
- How to Inactivate a Course (CIM)
- How to Reactivate a Course (CIM)
- CIM Programs/Academic Structure Companion Guide

General Information

Approve Pages AKA Workflow

The Approve Pages website allows users who are part of a workflow to edit, rollback, or approve a page or form.

The Page Approval Window Has Three Main Sections:

1. **Pages Pending Approval (upper left):** Use this list to select the page or form desired to review. The page or form selected will appear in the Page Review window. Click the **Your Role** drop-down to select a role to view/edit. When a role is selected, the Pages Pending Approval list will be populated with pages or forms that require review, editing, or approval from the selected role. Click **Refresh List** to see if new pages or forms have been added since last visited or if the list doesn't contain an expected page.

2. **Page Info/Status (upper right):** Review basic page or form information and the selected page’s or form’s workflow status. Click the various tabs to view different information about a given page or form.
3. **Page Review (bottom):** Review the selected page or form here, then approve it, edit it, or send it back to a previous user in the workflow. Review changes made by various users in the workflow by clicking the View Changes By drop-down and selecting the users to review.

**How to Access Approve Pages**

1. Navigate to [https://nextcatalog.ucdenver.edu/courseleaf/approve/](https://nextcatalog.ucdenver.edu/courseleaf/approve/) or click the Page Approval link from the automated email
   - The Page Approval email is auto generated by our vendor
   - The Pages Pending Approval queue website is behind Single Sign On (SSO) and users need to be provisioned into the CourseLeaf software to view the pages and forms.
   - If a user is unable to log in, they will need to email courses@ucdenver.edu and/or cusisdev@ucdenver.edu to determine the next steps to be provisioned

2. Click the Your Role drop-down menu at the top of the page and select the role in which you want to review and approve pages or forms
   - While a user’s name will be one of the options in the drop-down menu, users do not have pages/forms routed directly to their names. Pages/forms are routed to a role, not a specific person
   - If you use the link from the automated email, your role will be pre-selected for you
   - **Note:** Click the Refresh List button to see if new pages/forms have been added since your last visit or if the list doesn't contain an expected page/form

**How to Take Action on a Page or Form**
1. Navigate to nextcatalog.ucdenver.edu/courseleaf/approve or click the **Page Approval link** from the automated email
   - This email is auto generated by our vendor

2. Click the **Your Role** drop-down menu at the top of the page and select the role you want to review and approve pages or forms
   - If you use the link from the automated email, your role will be pre-selected for you
   - **Note:** Click the **Refresh List button** to see if new pages/forms have been added since your last visit or if the list doesn’t contain an expected page

3. Scroll through the **Pages Pending Approval** list and select the page or form to review or edit
   - When a page or form is selected, the reports and workflow status window and the Page Review window will be populated with information
   - To filter your pages or forms, click the **Filter List button**, then enter text to filter on. You may filter on any text in the URL or title shown in the Pages Pending Approval window. To reset the filter to show all, click Filter, then click **OK** with the filter field blank

4. Review content in the **Page Review** window:
   - **View changes made**: Click the **View Changes By** drop-down menu and select the individual whose changes you wish to review
     - The selected individual’s changes are shown in red and green: red for deleted text, green for new text. For Catalog Editing- If there are multiple tabs on a page, the user will need to click on each tab to view all changes
       - Important note: changes made by the Registrar’s Office Catalog Team to create/update roles and workflows AND to route pages into the first step of the workflow are also considered edits. These changes will not have red/green markup.
     - Remember that any number of individuals can be in a workflow. Each individual reviews or edits content sent from the individual directly preceding them in the queue. The changes seen here are changes the selected individual made compared to the document they received
   - **Hide Changes**: View the document without color-coding or markup

5. Choose an action on the page. One of four actions may be taken after reviewing a page/form. To edit, rollback, or approve the page/form, click the appropriate button in the upper right of the Page Review window. The page/form may also be left alone and returned to later.
• **Edit the page**: Click Edit to make changes to the page/form. This will produce a toolbar at the top of the Page Review window. After editing the page/form, approve the page/form to send it to the next step in the workflow.

• **Roll back the page**: Click Rollback to send the page/form back to a previous user. This does not mean the user is rejecting or denying a page/form. The rollback feature is utilized to have users in previous steps in the workflow make an edit themselves or to ask for clarification. A prompt will appear to make comments about why the page/form is being rolled back. Make comments in the space provided and click Rollback in the new window.
  - An email will be generated and sent to the user(s) in the role along with the comment generated.

• **Approve**: Click Approve to send the page/form on to the next step in the workflow.
  - **No warning is generated when a page/form is approved asking if the user is sure they want to approve a page.**
  - Only approve pages when the page would be considered ready for publishing for the catalog or when the CIM form would be considered ready for processing by the Registrar’s Office.

• **Leave the page for another time**: The page/form may be left for another time. Select another page/form to review, or click Logout.

### Information Specific to CIM Courses (New, Editing, and Inactivation)

- All forms will have the title of Course Change Request no matter the action being taken.
  - This is a delivered form name from our vendor.
Information Specific to CIM Courses (New and Editing Course Proposal Form)

1. Important areas to review on the form include the following:
   a. Pages Queue
      i. The queue of all the forms in a given workflow step
      ii. All Course Proposal Forms will start with following page name: /courseadmin
   b. Export to PDF
      i. Allows user to export the form to a PDF page
   c. New Course Proposal
      i. Type of form being submitted
         1. This title of the form is visible because this is a New CIM Courses/Course Proposal form being submitted.
         2. If the form is being used to edit an existing course, this title will not be present, and the Ecosystem will be present instead
            a. The Ecosystem shows all the pages in CAT where this course is referenced
b. Shred Proposal
   i. Allows a user to delete the request

e. Date Submitted
   i. The day the form was submitted and sent to the first step in the workflow

f. Viewing
   i. Matches the form that is selected in the Pages Queue/the name of the course

g. In Workflow
   i. The workflow steps for any given form
      1. If a step is in green - this means that step reviewed and approved the form
      2. If a step is in orange/yellow - this means the form is currently in that queue (color varies on computer monitors)
      3. If a step is in grey - this means the form has not gone to that step yet OR if a form was rolled back, the form has not yet returned to that step

h. Last edit
   i. Shows the last day/time edits were made to this form

i. Changes proposed by
   i. Shows the user who submitted the form

j. Approval Path
   i. Shows which users in which queues approved or rolled back a form and what day/time this action took place
Information Specific to CIM Courses (Inactivating Course Proposal Form)

1. Important areas to review on the form include the following:
   a. Pages Queue
      i. The queue of all the forms in a given workflow step
   b. Export to PDF
      i. Allows user to export the form to a PDF page
   c. Shred Proposal
      i. Allows a user to delete the request
   d. Course Inactivation Proposal
      i. This is the type of form being submitted
   e. Date Submitted
      i. The day the form was submitted and sent to the first step in the workflow
   f. Viewing
      i. Matches the form that is selected in the Pages Queue/the name of the course
   g. In Workflow
      i. The workflow steps for any given form
1. If a step is in green- this means that step reviewed and approved the form
2. If a step is in orange/yellow- this means the form is currently in that queue (color varies on computer monitors)
3. If a step is in grey- this means the form has not gone to that step yet OR if a form was rolled back, the form has not yet returned to that step

h. Last edit
   i. Shows the last day/time edits were made to the form
i. Changes proposed by
   i. Shows the user who submitted the form
j. Catalog Pages Referencing this course
   i. The Ecosystem shows all the pages in CAT where this course is referenced
k. Approval Path
   i. Shows which users in which queues approved or rolled back a form and what day/time this action took place
l. Justification for this inactivation request
   i. Part of form where user enters why course is being inactivated

Information Specific to CIM Programs (New, Editing, and Inactivation)

- All forms will have the title of Program Change Request no matter the action being taken
  o This is a delivered form name from our vendor
1. Important areas to review on the form include the following:
   a. Pages Queue
      i. The queue of all the forms in each workflow step
      ii. Academic Structure forms AND CIM Programs Edit forms (the information from the Degree Requirements tab for program pages) will start with following page name: /programadmin
   b. Export to PDF
      i. Allows user to export the form to a PDF page
   c. New Program Proposal
      i. This title is visible because this is a New CIM Program/ Academic Structure Form being submitted.
      ii. If the form is being used to an existing course, this title will not be present, and the Ecosystem will be present instead
         1. The Ecosystem shows all the pages in CAT where this program is referenced
   d. Shred Proposal
      i. Allows a user to delete the request
   e. Add Comment
      i. Allows a user to make a comment about the form; this is different from editing, as this is only commenting on the contents of the form itself
   f. Date Submitted
      i. The day the form was submitted and sent to the first step in the workflow

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g. Viewing
   i. Matches the form that is selected in the Pages Queue/the name of the program

h. In Workflow
   i. The workflow steps for any given form
      1. If a step is in green- this means that step reviewed and approved the form
      2. If a step is in orange/yellow- this means the form is currently in that queue (color varies on computer monitors)
      3. If a step is in grey- this means the form has not gone to that step yet
   i. Last edit
      i. Shows the last user to make edits to this form
   j. Changes proposed by
      i. Shows the user who submitted the form
   k. Program/Academic Structure Request
      i. The form itself
   l. Approval Path
      i. Shows which users in which queues approved or rolled back a form and what day/time this action took place

Information Specific to CIM Programs (Edit Degree Requirements in CAT)

1. Important areas to review on the form include the following:
   a. Pages Queue
i. The queue of all the forms in each workflow step

ii. Academic Structure forms AND CIM Programs Edit forms (the information from the Degree Requirements tab for program pages) will start with following page name: /programadmin

b. Export to PDF
   i. Allows user to export the form to a PDF page

c. Shred Proposal
   i. Allows a user to delete the request

d. Add Comment
   i. Allows a user to make a comment about the form; this is different from editing, as this is only commenting on the contents of the form itself

e. Date Submitted
   i. The day the form was submitted and sent to the first step in the workflow

f. Viewing
   i. Matches the form that is selected in the Pages Queue/the name of the program

g. In Workflow
   i. The workflow steps for any given form
      1. If a step is in green- this means that step reviewed and approved the form
      2. If a step is in orange/yellow- this means the form is currently in that queue (color varies on computer monitors)
      3. If a step is in grey- this means the form has not gone to that step yet

h. Last edit
   i. Shows the last user to make edits to this form

i. Changes proposed by
   i. Shows the user who submitted the form

j. Ecosystem
   i. Shows all the pages in CAT where this program page is referenced

k. Approval Path
   i. Shows which users in which queues approved or rolled back a form and what day/time this action took place
Information Specific to CIM Programs (Inactivating a Program through Academic Structure)

1. Important areas to review on the form include the following:
   a. Pages Queue
      i. The queue of all the forms in a given workflow step
      ii. Academic Structure forms AND CIM Programs Edit forms (the information from the Degree Requirements tab for program pages) will start with following page name: /programadmin
   b. Export to PDF
      i. Allows user to export the form to a PDF page
   c. Shred Proposal
      i. Allows a user to delete the request
   d. Program Inactivation Proposal
      i. This is the type of form being submitted
   e. Add Comment
      i. Allows reviewer to comment on the form
   f. Date Submitted
      i. The day the form was submitted and sent to the first step in the workflow
   g. Viewing
      i. Matches the form that is selected in the Pages Queue/the name of the program
   h. In Workflow
The workflow steps for any given form

1. If a step is in green- this means that step reviewed and approved the form
2. If a step is in orange/yellow- this means the form is currently in that queue (color varies on computer monitors)
3. If a step is in grey- this means the form has not gone to that step yet OR if a form was rolled back, the form has not yet returned to that step

i. Last edit
   a. Shows the last day/time edits were made to the form
j. Changes proposed by
   a. Shows the user who submitted the form
k. Catalog Pages Using this Program
   a. The Ecosystem shows all the pages in CAT where this course is referenced
l. Approval Path
   a. Shows which users in which queues approved or rolled back a form and what day/time this action took place
m. Final Catalog and Justification for this inactivation request
   a. Part of form submitted where user enters when the last time this program should be in a catalog and why the program is being inactivated

Additional Tips & Notes

- Be sure to click Approve when finished so the page or form advances through the workflow
- All changes are visible by default. Click Hide Changes to view only the final text. Changes are also viewable by user

Troubleshooting & Points of Contact

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<tr>
<th>Contact Name</th>
<th>Title</th>
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