Directions for Workflow Approvers

A workflow in the CourseLeaf Console will route to an approver when it is at their step in the approval process. The approver will get an email notification from CourseLeaf [CIM Programs] or CourseLeaf [CIM Agreements]. The email subject line will state: Action Required. This lets the approver know what type of change (program or agreement) has routed to them and that they need to review and approve it.

Approval Process

☐ The approver should:
- Open the email;
- Navigate to the appropriate CourseLeaf Console using their Page Pending Approval link in the email;
- Review content in the Page Review window. Any changes to content will be shown in red and green - red for deleted text and green for new text.
- Click the Edit button to make changes to the page, if applicable.
- Rollback the page to a previous approver and add comments about why the page has been rolled back, if applicable.
- Click approve to send to the next step in the workflow.

If an approver does not receive an email notification or accidentally deletes an email from Courseleaf, they can click on the link provided below. The link will take them to the Approve Pages portion of the Console. At the top of the page, they should select their role from the Your Role dropdown. Once the role is selected, all proposals sitting at their step will appear in their Pages Pending Approval window. Select the proposal for approval and follow the approval process steps above.

https://next.catalog.utsa.edu/courseleaf/approve/

Note: If there are two people in one role (e.g. two individuals listed as the curriculum committee chair), either can approve the proposal. Whomever acts on the proposal first will see the proposal. After it is approved, it will no longer be visible to the other individual from their link in the automated email or from the link provided above. In order to view it, they would have to log into CourseLeaf and search for the proposal by keyword.

Roles

Roles in CourseLeaf workflows are pre-set based on entities at UTSA that need to review and/or approve new programs or agreements and changes to existing programs or agreements. Roles include, but are not limited to: SACSCOC Accreditation Liaison, Academic Innovation, Enrollment Marketing, Institutional Research and Analysis, Department Curriculum Committees/Chairs (UG or Grad), Department Chair, College Financial Lead, College Associate Deans (UG or Grad), Dean, Academic Affairs Financial Lead, Registrar, Admissions and Financial Aid, Advising Center, UG Vice Provost, Senior Vice Provost and Dean for Graduate School, Graduate Council, University Curriculum Committee/Chair, Faculty Senate/Chair, Academic Affairs, Catalog Editor, Library, Global Initiatives, Collaborating Chair and Collaborating Dean.

FYI Only Steps

Some roles in the workflow are FYI only. FYI roles will receive an email notification; however, the subject line of the email will state that no approval is necessary or no action is required in CourseLeaf. However, those in FYI roles most likely need notification because they are on a committee that needs to see these types of changes or in an area that needs to follow up with their own actions when this change is approved.