## What is CourseLeaf?

- It is a suite of online applications that help manage the undergraduate curriculum and courses.
- There are three applications: CAT, CIM, and WEN.

### CAT
- Includes major/program overviews, course listings for academic year, and regulations
- Used to produce the YCPS

### CIM
- Propose new courses
- Edit existing courses (title, description, syllabus, format, etc.)
- Lists all active courses available in a subject
- Sortable by workflow and status

### WEN
- Offer/cancel courses for specific terms
- Edit times, instructors, and room information (term-specific information)
- See history of course offerings through Framer tool
After this workshop, a DUS working in CourseLeaf should:

- Understand how to navigate to CourseLeaf and access department information
- Have the ability to edit and submit a program description
- Have the ability to submit and approve a new course proposal
- Understand how to edit courses and approve course edits
- Know how to approve or request a multiple title

There are three main steps in the creation of the YCPS that use the three modules of CourseLeaf:

- The first step is editing or verifying your program or major description through CAT.
- The next step is proposing any new courses that will be taught or editing any existing courses that need to be changed for the next academic year. This is done through CIM.
- The final step is offering the courses to be taught for the next academic Year in WEN.

Please note that these steps do not necessarily have to done in order. All three modules are open and can be worked in simultaneously.
• CourseLeaf Resources Web page: http://www.yale.edu/sfas/registrar/CLresources.html
  • Includes FAQs, links, instruction guides, and related resources
• Departmental Registrar or DUS Assistant
• Future workshops
• Email: courseleaf@yale.edu

Important dates to keep in mind:

<table>
<thead>
<tr>
<th>Date</th>
<th>YCPS Milestones</th>
<th>Module(s) Used</th>
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</thead>
<tbody>
<tr>
<td>February 2, Mon.</td>
<td>CourseLeaf opened for 2015–2016 program and course information</td>
<td>CAT, CIM, &amp; WEN</td>
</tr>
<tr>
<td>February 23, Mon.</td>
<td>Updates due for departmental program descriptions in the YCPS</td>
<td>CAT</td>
</tr>
<tr>
<td>February-May</td>
<td>Identify and offer courses for the next academic year; Identify names of instructors, term, and meeting times; Edit existing courses as needed</td>
<td>CAT &amp; WEN</td>
</tr>
<tr>
<td>March 27, Fri.</td>
<td>Updates due for the &quot;Undergraduate Curriculum&quot; and &quot;Academic Regulations&quot; sections of the YCPS</td>
<td>CAT</td>
</tr>
<tr>
<td>April 30, Thurs.</td>
<td>Last day to submit new-course proposals to the CSC for inclusion in the initial publication of the YCPS</td>
<td>CIM</td>
</tr>
<tr>
<td>May 5, Tues.</td>
<td>Last day to activate courses and submit course changes for inclusion in the initial publication of the YCPS; WEN closes</td>
<td>WEN</td>
</tr>
<tr>
<td>July</td>
<td>Catalog is published online</td>
<td></td>
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</table>
CAT is used for producing the Yale College Programs of Study and includes each departments course offering for the academic year, major and program descriptions, and student regulations.

- Departments are responsible for updating the faculty listings.
- Significant changes to a major or major requirements require advance approval by the COM or CSC. By February 13, all intentions to change major requirements should e-mailed to Laurie Ongley.
- The deadline to submit edits and to approve content for the next YCPS is February 23.
- Go to: https://next.catalog.yale.edu/
- Click EDIT PAGE at top left and CAS log in
- Use A-Z INDEX to find program or major
Once on your program or major page, click EDIT PAGE at the top left.

A tool bar will open.

Click Page Body to edit the program of major overview.
• Clicking on the Page Body icon will open an editing window.
• Make any necessary edits to the content.
• YCPS editors will edit for style and format.
• The tool bar at the top is very similar to Word.
• Most course numbers will already be linked.
• If you need to add a new course number to the overview, use the Insert/Edit Database Field button in the tool bar to link courses.
• Courses that are linked will be able to be clicked by users in the final YCPS so that the user can see the course information.
When edits are finished, click OK to save and close the window.
• The changes will automatically save when the window closes.
When the window closes, the Start Workflow button will turn green at the bottom right of the screen.

Your work is saved. You may leave the page and return to work on it another time if you wish.

Only click Start Workflow when all changes are finished and the content is ready to be submitted.

Only DUSes should start the workflow.

Remember to Start Workflow by February 23.
If your program or major relates courses, it is recommended that you contact programs or majors that you relate courses with as early as possible to start building a list of courses you think will be included. A reminder will go out about relating courses in early May.

- Navigate to the courses tab.
- Either click Edit Courses on page or Courses on the tool bar.
A new window will open, showing any sections that exist for your course page, including related courses.

Scroll to the section for related courses.

Double click anywhere inside the Course Block.
A smaller window will appear.

You can add courses to the block by clicking New Course.

Remove a course by clicking on the course in the list to highlight it and then clicking Delete Course.

You can arrange courses by clicking a course to highlight it, and then use the Move Up or Move Down buttons.

Click OK to save and go back to the previous window.

Click OK again to save your related courses block and return to the Courses tab.

**Deadline for relating courses is May 11.**
CIM (Course Inventory Management) is used for proposing new courses and editing existing courses. Edits could include title or description changes, adding or removing multiple titles, or changing the format of a course. CIM should not be used for updating a term-specific information.

- Go to: [https://next.catalog.yale.edu/courseadmin/](https://next.catalog.yale.edu/courseadmin/)
In CIM you can:

• Search for and edit an existing course
  • Search by subject code only (e.g. AFAM)
  • Search by subject code and course number (e.g. ZULU 120)
• Search by title
• Use * for wildcard
• Propose a new course
• Sort results by Course Code, Title, Workflow, or Status (click the word to sort)
When you click Propose New Course, a course proposal form will appear in a new window. All fields surround by a red box are required, but please complete as much of the form as possible. Click the blue question mark icons for helpful information about each field.

The first step is to choose an Effective Term. This is the first term the course will be taught.

Next, enter the instructor’s NetID. If you do not know it, click the magnifying glass icon to search. If the instructor is new and does not yet have a NetID, enter STAFF (all caps).

Upload the syllabus by clicking Attach Files.

Enter the full course title.

Choose the subject code from the dropdown and enter the course number. If the number you are using has been used within the past 7 years, you will need to remove the number from the course it is attached to beforehand.

Add any multiple titles or graduate/professional school number that you would like to request (even if you have not received approval yet). If you do not know the number, use TBD. These requests follow a separate workflow process.

Enter the course description. The description should be 2-3 sentences. This is the description used in the YCPS, OCI, and YBB.
Enter the Expanded Description. This is the full-length description of the course and will not be used for the YCPS, OCI, or YBB. This description will be reviewed closely by the CSC in consideration of the course proposal.

Include a full list of the Principle Readings for the course.

Select the format of the course from the dropdown. The format selected here will determine which Yale College Standard Meeting Times will be available for the course when offered. Note that if Seminar is selected, the Instructor Permission Required box below will default to being checked.

- Note that the Permission Key and Preference Selection questions are for informational purposes only. If you plan to use a Permission Key or setup a Preference Selection site, please contact courseleaf@yale.edu.
Enter an Estimated Enrollment for the course. Try to be as accurate as possible. This number will be used for purposes of placing the class in an appropriately sized room.

Choose whether or not this course may be repeated for credit.

Meeting Pattern options will appear based on the Type of Instruction selected above.

The statement on academic integrity should explain how instructors will verify that students do not plagiarize, cheat on a test or examination, improperly collaborate on assignments, or submit the same essay to two instructors without the explicit consent of both. Each syllabus should repeat the academic integrity statement and also include a link to the Writing Center.

Include the average number of pages student will be required to read each week.

Indicate what course work will serve as graded midterm feedback.

Indicate what course work will serve as end-of-term work.
Select any Distributional Designations you would like to request for the course. No DDs are given automatically to any department; they must always be requested. Once a DD is checked, a new box will appear requesting justification. If a Foreign Language is selected, a second box will appear.

Describe how this course fits within the departmental curriculum.

Describe how this course differs from other courses that may be similar in or outside of the department.

Add any additional comments you may want the CSC to take into consideration while reviewing the proposal.

- You may click Save Changes and continue working on the proposal another time. Once the proposal is complete, click Save & Submit to start workflow.
This is a typical workflow for a course proposal. The workflow for edits to existing courses is very similar. Multiple Title requests follow a separate but parallel workflow so that MT approvals do not hold up the progress of the course. Once a course has been approved by the CSC and reaches the Banner stage of workflow, it is then available to be offered in WEN. Note that courses are not automatically offered, and it is the department’s responsibility to offer the course. Once a course is submitted to workflow, it can only be edited by the members of a given workflow group. It must either be rolled back for an edit to be made or else complete the workflow entirely.
Any faculty or staff support member is able to submit a course proposal. When the proposal is submitted, and email is generated and sent to the DUS of the primary department listed on the proposal. The email will contain a link to follow in order to approve the course. The email will direct the DUS to the Course Approve page.

- Once you log in, select your DUS role from the Your Role dropdown (e.g. HIST DUS).
- Note that it may take a few seconds to load.
- This is also a good place to see pending approvals if you cannot find the original email notification. The direct URL is: https://next.catalog.yale.edu/courseleaf/approve/
- If you do not see your role in the dropdown, you have nothing to approve.
After you select your DUS role, a list of all courses requiring your approval will appear. Select the course you wish to look at. You have the options of approving as is by clicking Approve, editing the course by clicking Edit, or sending the proposal back to the person who submitted it by clicking Rollback. You can also add a comment by clicking Add Comment. It is recommended that you add comments explaining your actions when rolling back or editing the course proposal.
The DUS will also receive email notifications for approving multiple title requests. As the DUS you will receive notifications to approve both requests for the addition of a multiple title from another department to your department and requests to add a number from your department as a multiple title to another department’s course. The email notification will take you to CIM for this approval. Simply follow the link in the email and click Approve. Add any comments as necessary. MT approvals should be made before the course reaches the Banner stage.
Courses that have completed workflow will be eligible for editing by clicking on Edit Course after finding the course in CIM.

A history of the course can be seen on the right. Click on any date listed to see details.

Some edits to courses require approval from the CSC. Either the title, description, or instructor may be changed without approval from the CSC. If two or more are changed within a year, however, CSC approval is required. Format changes and the addition of graduate or professional numbers also require CSC approval.

All changes are subject to editing.

Editing a course works exactly like offering a course. The same fields that are in a course proposal are available to be edited. Once you save and submit, the course will enter appropriate workflow.

If a course is in workflow, you may not be able to make changes. Contact courseleaf@yale.edu if you need to make changes to a course that is in workflow and you cannot make the edits through CIM.
To add a multiple title (MT) to or change the primary department on an existing course, you will also click Edit Course.

A new window will open that is identical to the course proposal form.

Add or change MTS as needed and click Save and Submit when done to start workflow.

The DUS of the primary department as well as the DUS and Chair of the secondary department will all need to approve the MT through CourseLeaf. Each person will receive an email notification prompting approval. If the person proposing the MT addition is one of the above roles, they will not need to approve.

It is recommended that you contact the primary or secondary department in advance before adding the MT. This both provides advance notice about the request and allows you to obtain the correct number to add in CourseLeaf.

If MTs are being added after the course has already been offered for a given semester (i.e., the course is already appearing on OCI), please notify courseleaf@yale.edu. An extra step is necessary to get the MT added to a course at that stage.

It is recommended that MTs be requested and approved prior to a course being offered.
How do the various course and curriculum management systems work together?

- Banner is the ultimate system of record.
- Once a course is approved through CIM, the data is transferred to Banner.
- Banner lets WEN know what courses are eligible for offering.
- Departments offer eligible course sections in WEN, and that information goes back to Banner. It also feeds to the course tab in CAT.
- Course section information in Banner feeds to OCI and YBB. There is a delay between when information is entered into Banner and when it is displayed in OCI and YBB.
- Banner information also feeds to ClassesV2. While the University Registrar's Office does not manage ClassesV2, it supplies the information to the system. Course sites are created automatically each night once a course has been offered and has an instructor.