Introduction to CourseLeaf

Agenda:
1:00-1:10pm – Introductions
1:10-1:50pm – Presentation
1:50-2:00pm – Questions

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After this course, you will know:
• the three applications that make up CourseLeaf.
• what each of the three applications are used for.
• who uses CourseLeaf.
• how to navigate CourseLeaf and access information.
• how faculty propose new courses and how new courses are reviewed and existing courses are edited.
• how CAT is used to create publications.
• how classes are offered for each semester.
• how to navigate the Approve Page.
• how CourseLeaf interacts with other systems at Yale.
**What is CourseLeaf?**

- It is a suite of online applications used to manage curriculum and courses.
- There are three applications: CAT, CIM, and WEN.

<table>
<thead>
<tr>
<th>CAT</th>
<th>CIM</th>
<th>WEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes major/program overviews, course listings for academic year, and regulations</td>
<td>Propose new courses</td>
<td>Offer/cancel course sections for specific terms</td>
</tr>
<tr>
<td>Used to produce multiple publications for Yale College and the Graduate School of Arts and Sciences</td>
<td>Edit existing courses (title, description, syllabus, format, etc.)</td>
<td>Edit times, instructors, and room information (term-specific information)</td>
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<tr>
<td></td>
<td>Lists all active courses available in a subject</td>
<td>See history of course offerings through Framer tool</td>
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Who uses CourseLeaf?

- DUSes and DGSes
- FAS Faculty
- Department registrars and DUS/DGS Assistants
- Department Chairs
- Yale College Dean’s Office
- Graduate School Dean’s Office
- University Printer’s Office
- University Registrar’s Office
Each publication has a unique workflow process which may include some of the following steps:

- Updating or verifying your content
- Editing
- Dean approval
- Contract/archival copy publication

Departments are responsible for updating the faculty listings and entering changes to requirements, major, degree program, regulations, etc.

For Yale College only: Significant changes to a major or major requirements require advance approval by the Committee on Majors.
There are three main steps in the creation of the Bulletin and Catalog that use the three modules of CourseLeaf:

• Edit or verify your degree program, requirements, major description, policy section, etc. through CAT
• Propose any new courses or edit any existing courses for the next academic year through CIM
• Offer the courses to be taught for the next academic year in WEN

• These steps do not necessarily have to be done in order. All three modules can be worked in simultaneously if all are open.
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.
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)
• Note: a new CIM form will be introduced after spring break
When you click Propose New Course, a course proposal form will appear in a new window.

All fields surrounded 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.

Note: for Graduate Courses, please wait to use the new form that is coming after spring break.
When you get to the end of the form, you may click Save Changes and continue working on the proposal another time. Once the proposal is complete, click Save & Submit to start workflow.
Existing courses are 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.

All changes are subject to editing from the University Registrar’s Office or University Printer’s Office.

Editing a course is similar to proposing a new course. The same fields that are in a course proposal form are available to be edited. Once you save and submit, the course will enter appropriate workflow.

If a course is already 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.
All course proposals and edits require an approval process through workflow. Once submitted to workflow, a course can only be edited by the members of a given workflow group.

When workflow is started, each step appears on the right of the CIM record. Green=approved; Yellow=current stage; Gray=pending.

If you click on any step in the workflow, you will be able to e-mail the person responsible for approving that step.

You will also see the Approval Path, which will let you know who approved each step and when.

Once a course reaches the Banner stage, it will then be available for offering through WEN. Courses are not automatically offered; it is the responsibility of a department to offer the course.

Note: workflow will vary based on whether the course is a graduate course, undergraduate course, or both.
WEN is used for offering particular courses for individual terms. WEN is used for term-specific information such as the instructor names(s) and the meeting pattern. WEN is also used by departments for entering pre-assigned room locations.
• Terms are arranged in three columns: Historical, Current, and Future
• Depending on the time of the year, only certain terms will be available for editing.

<table>
<thead>
<tr>
<th>Historical</th>
<th>Current</th>
<th>Future</th>
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<tbody>
<tr>
<td>2014 Academic Year</td>
<td>2013 Academic Year</td>
<td>2016 Academic Year</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>Fall 2012</td>
<td>Fall 2015</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>Spring 2013</td>
<td>Spring 2016</td>
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<tr>
<td>2012 Academic Year</td>
<td>2011 Academic Year</td>
<td></td>
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<tr>
<td>Fall 2011</td>
<td>Fall 2010</td>
<td></td>
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<tr>
<td>Spring 2012</td>
<td>Spring 2011</td>
<td></td>
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<tr>
<td>2010 Academic Year</td>
<td>2009 Academic Year</td>
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<tr>
<td>Fall 2009</td>
<td>Fall 2008</td>
<td></td>
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<tr>
<td>Spring 2010</td>
<td>Spring 2009</td>
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<td>2008 Academic Year</td>
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<td>Fall 2007</td>
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<td>Spring 2008</td>
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- Find your department or program in the list.
- Double click the department/program to open.
- There is a course and section count for each department/program.
If it is the first time opening a new term, the page will be blank. Whether or not any courses have been offered for a particular term, you will always be able to find all courses available for offering by clicking the box at the top right corner next to “Show courses with no sections.”

Clicking the box will show you all courses that are available for offering.
Double clicking on a course title will display **X** and **+** icons. When you click the **+** icon, a new window appears for adding section offering information.

- As courses are offered they will appear on your department or program page in WEN.
- These offerings can be updated after being added.
- It is only possible to offer and edit courses that are primary in your department or program.
At various times, you will receive system generated emails directing you to the Approve Page. This is an administrative webpage used for approving course proposals and edits as well as pages you are responsible for in the various publications produced by CAT, including the Grad Bulletin.

- Always make sure to select your role from the dropdown at the top right.
- From this page you can edit, rollback, or approve courses and pages pending your approval.
How do the various course and curriculum management systems work together?

- Banner is the ultimate system of record.
- Once a course is approved in 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, which then 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 and Canvas. While the University Registrar's Office does not manage these systems, it supplies the information that generates course sites.
Thank you for attending!

Here are some resources for additional information, training, and help:

• CourseLeaf Resources webpage: [http://registrar.yale.edu/staff/system-support/courseleaf-resources](http://registrar.yale.edu/staff/system-support/courseleaf-resources)
  - Includes FAQs, links to each application, instruction guides, and other resources
  - Note: grad-specific resources will be added in the coming weeks
• More workshops will be announced and offered for each specific application.
  - CAT Workshops are scheduled for next week.
  - Register at [http://registrar.yale.edu/cat-workshop-registration](http://registrar.yale.edu/cat-workshop-registration)
    - Tuesday, Feb 14, 10:00-11:00am, HLH17 111
    - Thursday, Feb 16, 2:00-3:00pm, HLH17 111
• Email: [courseleaf@yale.edu](mailto:courseleaf@yale.edu)

Questions?