

CourseLeaf Handbook

Introduction

CourseLeaf – From [Leepfrog Technologies](#), this software platform is designed for the management of curriculum inventories within institutions of higher education. In the spring of 2023, UM purchased and launched CourseLeaf to provide a streamlined process for managing our curriculum inventory, including the approval process for making changes to that inventory. The CourseLeaf system provides unprecedented opportunities for collaboration, communication, and innovation.

Email Notifications – With this platform, the process of getting multiple approvals on a curriculum proposal will be seamless and quick – no need to print out forms and carry them from building to building. However, the efficiency of this process is dependent upon close attention to CourseLeaf email notifications. Please note that due to the automated nature of these notifications they are easily confused as spam. The “from” name will be **CourseLeaf Curriculum Management**, and the subject line will begin with [CIM Courses], [CIM Programs], or [CIM Misc] depending upon the type of proposal being noticed. The subject line will also include information regarding the type of notice and to whom it is directed.

This Handbook – This document is designed to provide succinct information on how to navigate the CourseLeaf platform. As such, this handbook reflects the organizational structure of the CourseLeaf platform, including the naming conventions used within the platform.

This handbook is NOT intended to be a guide to the **curriculum approval process**. Please refer to the following resources for more information:

Faculty Senate curriculum approval processes:

- [Faculty Senate - curriculum page](#)
- [Faculty Senate Procedure 201.00 - Curriculum Overview](#)
- [Faculty Senate Procedure 201.30 - Criteria for Evaluating Curriculum Changes](#)

OCHE Level I, Level II, and RTP approval processes:

- [Office of the Provost - Curriculum page](#)
- [MUS - Academic Affairs Procedural Guidebook](#)

Table of Contents

INTRODUCTION	1
FACULTY SENATE CURRICULUM APPROVAL PROCESSES:	1
OCHE LEVEL I, LEVEL II, AND RTP APPROVAL PROCESSES:	1
COURSELEAF LINKS	3
1. COURSE INVENTORY MANAGEMENT	4
NEW COURSES	4
EDITING COURSES.....	7
2. PROGRAM MANAGEMENT	9
NEW PROGRAMS.....	9
<i>Choose from the following options:</i>	10
EDITING PROGRAMS	11
<i>Choose from the following options:</i>	12
3. MISCELLANEOUS REQUEST MANAGEMENT	13
REQUEST TO PLAN (RTP).....	13
RENEWAL OF GENERAL EDUCATION DESIGNATION (INCLUDING WRITING COURSES).....	13
<i>Choose from the following options:</i>	14
4. PAGES PENDING APPROVAL	15

CourseLeaf Links

Prior entering the CourseLeaf platform, determine what is to be accomplished using the [resources](#) listed in the introduction for guidance.

CourseLeaf is accessed through **FOUR different entry points** based upon what changes are being proposed:

- 1) Course Inventory Management – <https://umt-next.courseleaf.com/courseadmin/>
 - a. Propose new courses (new GenEd designation may be selected within each proposal)
 - b. Propose substantive changes to existing courses (adding the GenEd designation may be selected within each proposal)
- 2) Program Management – <https://umt-next.courseleaf.com/programadmin/>
 - a. Propose new programs (including degrees, majors, minors, certificates, etc.)
 - b. Propose substantive changes to existing programs
- 3) Miscellaneous Request Management – <https://umt-next.courseleaf.com/miscadmin/>
 - a. Propose a Request to Plan (RTP) – (for new programs and units)
 - b. Submit RENEWAL of general education designation forms
- 4) Pages Pending Approval – <https://umt-next.courseleaf.com/courseleaf/approve/>
 - a. Rollback – to reject proposal and add comments/justification
 - b. Approve – to sign off on the proposal and move it forward in the process

Please note – Each of the four entry points will ask for the UM single sign-on authentication similar to all UM online processes. On first sign-on, a second authentication will appear – just click on the center of the screen.

The screenshot shows the NetID Login interface. At the top, there is a dark red header with the "NETID LOGIN" logo on the left, and "Accessibility" and "406-243-HELP(4357)" on the right. Below the header, a security warning states: "For your security, please close your web browser when not in use." The main login area contains two input fields: "NetID" and "Password". The "NetID" field has a "What is my NetID?" link below it. The "Password" field has an "I don't know my password!" link below it. A "Sign In" button is located below the password field. To the right of the input fields, there is a "Service Provider Logo" section for "CourseLeaf" by "Leapfrog Technologies CourseLeaf". At the bottom of the page, there is a dark red footer with the "UNIVERSITY OF MONTANA" logo on the left, and links for "Change Password", "Change Security Question", and "Duo Options" on the right. A green banner at the bottom of the page promotes Duo multi-factor authentication, stating "University of Montana is now offering multi-factor authentication(MFA) with Duo Security. Simple to use, with convenience options, Duo is more secure than using a password alone. Opt-in to enable Duo for your NetID account today!" and includes a "Learn More" link.

1. Course Inventory Management

This area of CourseLeaf provides options to propose new courses, make changes to existing courses, and propose new general education and writing courses.

New Courses

To propose a NEW course, begin with the green "Propose New Course" button.



Course Inventory Management

You are logged in as mb190101e [Help](#)

Search, edit, add, and inactivate courses.

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with "MATH", *MATH everything that ends with "MATH", and *MATH* everything that contains "MATH". The system searches the Course Code, Title, Workflow step and CIM Status.

Quick Searches provides a list of predefined search categories to use.

Archive History -OR-

Course Code	Title	Workflow	Status
CSTN 107	Joinery	Common Course Nu...	added
ECNS 410	Health Economics and Policy	Common Course Nu...	added
HSTA 417	Drayer & Civil Rights	HIST Chair	edited

A new window will open where information can be entered from scratch into the blank fields (all required fields are outlined in red):



Course Inventory

New Course Proposal

Subject Code Course Number

Effective Term

Short Title 30 characters remaining

Course Long Title 100 characters remaining

Department

College

Academic Level

Credits

Repeatable Yes No

Prerequisites

OR → the fields can be pre-filled with information from an existing course. For this option, begin with the green “Propose New from Existing Course” button.



Course Inventory

New Course Proposal

Propose New from Existing Course



Subject Code	Select...	Course Number	<input type="text"/>
Effective Term	Select...		
Short Title	<input type="text"/> 30 characters remaining		
Course Long Title	<input type="text"/> 100 characters remaining		
Department	Select...		

A search window will open with drop-down menus for College and Subject, revealing a list of the current courses available.

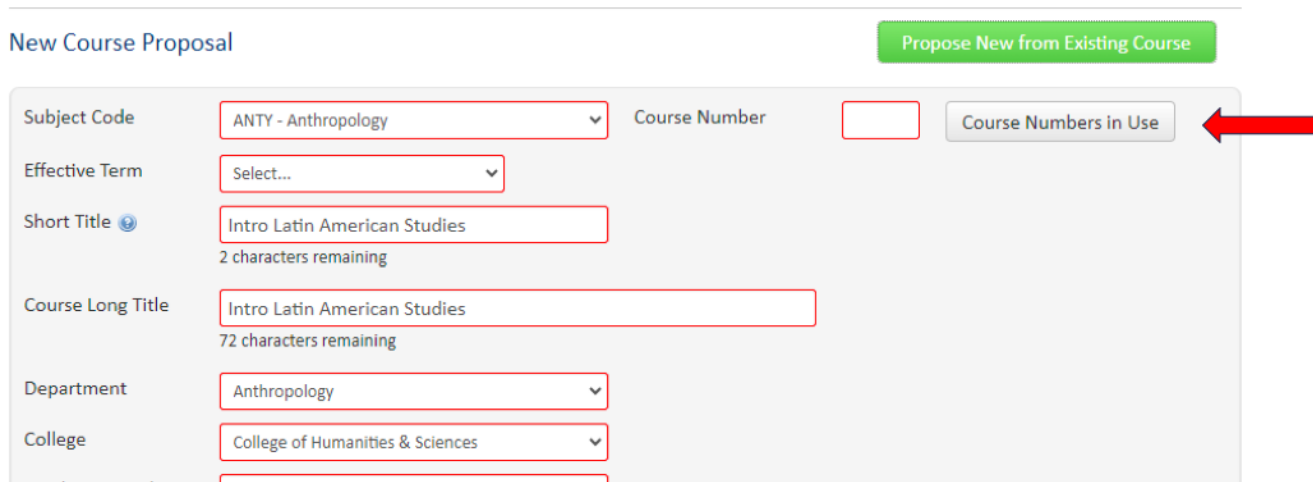
The screenshot shows a search window titled "CourseLeaf - Select CourseSt..." with a URL of "umt-next.courseleaf.com/courseleaf/course...". The search window displays a list of courses under the category "College Humanities & Sciences" and "Anthropology (ANTY)". The list includes courses such as ANTY 101H, ANTY 102H, ANTY 103H, ANTY 103X, ANTY 104, ANTY 122S, ANTY 124, ANTY 126, ANTY 133H, ANTY 133X, ANTY 141, ANTY 141H, and ANTY 150X. Below the list are buttons for "Quick Add:", "Add Course", "Add Selected", and "Close".

The main form in the background is titled "New Course Proposal" and has a green "Propose New" button. The form fields are: Subject Code (Select...), Course Number (input), Effective Term (Select...), Short Title (input, 30 characters remaining), Course Long Title (input, 100 characters remaining), Department (Select...), Academic Level (Select...), and Credits (input).

Select an appropriate/similar course to use as the template for the new course. The fields will fill with the existing information – each field should be carefully checked and edited to match the new proposal.

To avoid duplication when choosing a course number, be sure to check the list of existing course numbers by clicking the “Course Numbers in Use” button.

Course Inventory



The screenshot shows a web form titled "New Course Proposal". At the top right, there is a green button labeled "Propose New from Existing Course". Below this, the form contains several input fields: "Subject Code" (dropdown menu with "ANTY - Anthropology" selected), "Course Number" (empty text box), "Effective Term" (dropdown menu with "Select..." selected), "Short Title" (text box with "Intro Latin American Studies" and "2 characters remaining" below it), "Course Long Title" (text box with "Intro Latin American Studies" and "72 characters remaining" below it), "Department" (dropdown menu with "Anthropology" selected), and "College" (dropdown menu with "College of Humanities & Sciences" selected). To the right of the "Course Number" field is a button labeled "Course Numbers in Use", which is highlighted with a red arrow pointing to it from the right.

Once all of the fields have been filled, including uploading a syllabus at the “Attach Syllabus” green button, changes can be saved with the “Save Changes” button at the bottom of the form. This allows the proposer to return to the proposal and make further changes or edits prior to submission.

When the proposal is complete to the satisfaction of the proposer, click the green “Start Workflow” button at the bottom of the window to begin the approval process. This will trigger an email notification to the first approver in the process, requesting them to examine the proposal and provide either their comments/concerns via the “Rollback” button, or their approval via the “Approve” button.

Editing Courses

This area of CourseLeaf also provides the opportunity to make changes to existing courses. (This does NOT include General Education designation renewals [aka: rolling review] – see [Miscellaneous Request Management](#) below.)

[[Editorial Catalog Changes](#) that do not require approvals are not currently being processed through CourseLeaf – these should be emailed directly to [Troy Morgan](#), Associate Registrar.]

To make changes to an existing course, begin by searching for the specific course. Follow the instructions on the screen to successfully use the search function:

Course Inventory Management

You are logged in as mb190101e [Help](#)

Search, edit, add, and inactivate courses.

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with "MATH", *MATH everything that ends with "MATH", and *MATH* everything that contains "MATH". The system searches the Course Code, Title, Workflow step and CIM Status.

Quick Searches provides a list of predefined search categories to use.

Archive History - OR -

Course Code	Title	Workflow	Status
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Select the course from the list that appears and then click the green "Edit Course" button on the right-hand side.

English Archive History - OR -

Course Code	Title	Workflow	Status
ENLI 271	Least Know About English		deleted
ENLI 312	Structure of Modern English		deleted
ENLI 314	History of English Language		deleted
ENLT 383	Modern English Poetry 1900-45		deleted
ENT 446	Spec Topics English Educ		deleted
ENT 541	English Teaching Workshop		deleted

[Preview Workflow](#)

Viewing: **EASL 450 : Advanced English for Academic Purposes I:**

Written Production

English as an Academic Second Language (EASL)

A new window will open with all the fields pre-filled with the current course information. Each field should be examined and edited as needed to complete the proposed change.

As with a new course, a syllabus should be uploaded at the “Attach Syllabus” green button.

At the bottom of the page, choose from “Save Changes” in order to return to the proposal to make further edits prior to submission, or “Start Workflow” when the proposal is ready to begin the approval process.

To terminate or delete a course from the catalog, begin by searching for the course as above. Select the course and then click the red “Terminate” button. A new window will open. Complete the information requested and click “Start Workflow” to begin the approval process.

The screenshot displays a course management interface. At the top, there is a search bar containing the text "*English*", a green "Search" button, and checkboxes for "Archive" and "History". To the right of these are a "- OR -" separator, a green "Propose New Course" button, and a "Quick Searches..." dropdown menu. Below this is a table with the following data:

Course Code	Title	Workflow	Status
COM 101	English Composition		deleted
COM 145T	English Composition		deleted
EASL 250	Intermediate English for Academic Purposes I: Written Production		
EASL 251	Intermediate English for Academic Purposes II: Spoken Production		
EASL 450	Advanced English for Academic Purposes I: Written Production		
EASL 451	Advanced English for Academic Purposes II: Spoken Production		

Below the table, there is a red "Terminate" button with a red arrow pointing to it from the left. To its right are three buttons: "Export to PDF" (with a PDF icon), "Export to Word" (with a Word icon), and a green "Edit Course" button. Further right is a red "Preview Workflow" link. Below these buttons, the text "Viewing: **EASL 250 : Intermediate English for Academic Purposes I: Written Production**" is displayed. At the bottom, a scrollable area shows the text "English as an Academic Second Language (EASL)".

2. Program Management

This area of CourseLeaf provides options to propose new programs and make changes to existing programs.

New Programs

To propose a new program, begin with the green "Propose New Program" button.

The screenshot shows the 'Program Management' page of the University of Montana. At the top left is the University of Montana logo. The page title is 'Program Management'. In the top right corner, it says 'You are logged in as mb190101e' with a 'Help' link. Below the title, there is a search bar with a 'Search' button, a 'History' checkbox, and a '- OR -' separator. The 'Propose New Program' button is highlighted with a red circle. To the right of the button is a 'Quick Searches...' dropdown menu. Below these elements is a table with the following columns: 'Number of Program', 'Program Name', 'Workflow', and 'Status'. The table contains four rows of data:

Number of Program	Program Name	Workflow	Status
1	Associate of Arts		
2	Associate of Arts with concentration in Psychology		
3	Associate of Arts with concentration in Communication Studies		
4	Associate of Arts with concentration in Professional Communication		

A new window will open. The first field is a drop-down menu for the different types of new program proposals available. The type of program selected in this menu will determine what fields will appear below based upon the procedural and approval requirements for the specific type of program being proposed.

The screenshot shows the 'New Program Proposal' form in the University of Montana system. At the top left is the University of Montana logo. The page title is 'Program Management'. Below the title, there is a 'New Program Proposal' section with a 'Propose New from Existing Program' button. The 'Request Type' dropdown menu is open, showing the following options:

- Select...
- Level 2 (after RTP): New programs (#11)
- Level 1 (OCHE approval): New minor within existing major (#8)
- Level 1 (OCHE approval): New temporary CAS/AAS (#10)
- Level 1 (OCHE notice): New BAS/AA/AS area of study (#3)
- Level 1 (OCHE notice): New/revised/terminated certificate <30 credits (#2)
- Dual Degree (internal approvals only IF the two degrees are existing)

Below the dropdown menu, there are several input fields: 'Effective Catalog Edition', 'Program Title', 'CIP Code', and 'Campus'. The 'CIP Code' field has a 'Find...' button below it.

Choose from the following options:

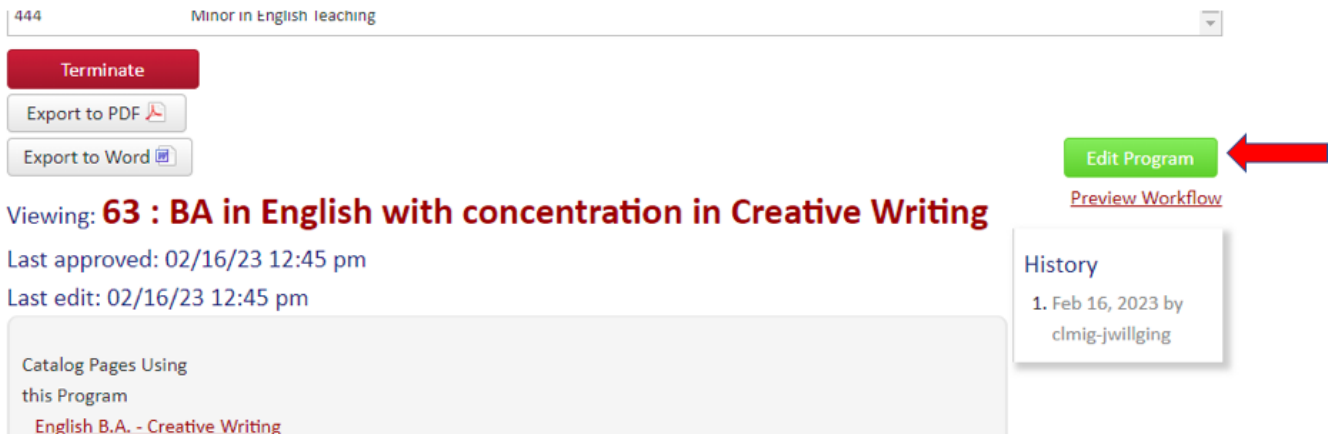
- **Level 2 (after RTP): New programs** – this creates a new undergraduate or graduate degree program (these are the Level II documents that require OCHE approval and must come AFTER the Request to Plan has been approved by BOR – see *Miscellaneous Request Management* below for the RTP form - #11 in the MUS handbook.)
- **Level 1 (OCHE approval): New minor w/in existing major** – (requires Level 1 approval from OCHE - #8 in the MUS handbook.)
- **Level 1 (OCHE approval): New temporary CAS/AAS** – this is the first step to creating a new associates degree program (requires Level 1 approval from OCHE - #10 in the MUS handbook.)
- **Level 1 (OCHE notice): New BAS/AA/AS area of study** – this creates a concentration within the BAS/AA/AS programs (requires notification to OCHE - #3 in the MUS handbook.)
- **Level 1 (OCHE notice): New/revised/terminated certificate <30 credits** – this is for all actions regarding campus certificates (requires notification to OCHE - #2 in the MUS handbook.)
- **Dual Degree** – this creates a program where two existing degrees may be pursued simultaneously as opposed to consecutively (no OCHE submission.)

Once all of the fields have been filled, including uploading all required supporting documents, changes can be saved with the “Save Changes” button. This allows the proposer to return to the proposal and make further changes or edits prior to submission.

When the proposal is complete to the satisfaction of the proposer, click the green “Start Workflow” button to begin the approval process. This will trigger an email notification to the first approver in the process, requesting them to examine the proposal and provide either their comments/concerns via the “Rollback” button, or their approval via the “Approve” button.

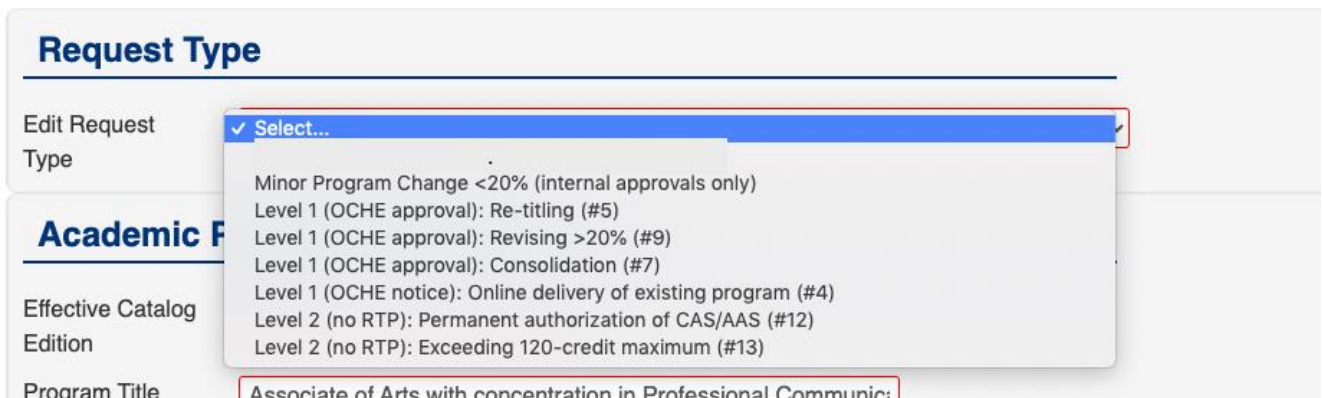
Editing Programs

This area of CourseLeaf also provides opportunity to make changes to existing programs. Begin by following the instructions on the search function to find the specific program you plan to change, select the program and then click the green "Edit Program" button on the right-hand side.



The screenshot shows a user interface for editing a program. At the top, there is a search bar containing "444" and "Minor in English teaching". Below the search bar are three buttons: "Terminate" (red), "Export to PDF" (with a PDF icon), and "Export to Word" (with a Word icon). To the right, there is a green "Edit Program" button with a red arrow pointing to it, and a red "Preview Workflow" link below it. The main content area displays "Viewing: 63 : BA in English with concentration in Creative Writing" in red text, followed by "Last approved: 02/16/23 12:45 pm" and "Last edit: 02/16/23 12:45 pm". Below this is a box titled "Catalog Pages Using this Program" with the entry "English B.A. - Creative Writing". On the right side, there is a "History" box showing "1. Feb 16, 2023 by clmig-jwillging".

A new window will open. The first field is a drop-down menu for the different types of changes available. The type of change selected in this menu will determine what fields will appear below based upon the procedural and approval requirements for the specific type of change being proposed.



The screenshot shows a "Request Type" dropdown menu. The menu is open, displaying a list of options. The first option is "Select..." with a checkmark. The other options are: "Minor Program Change <20% (internal approvals only)", "Level 1 (OCHE approval): Re-titling (#5)", "Level 1 (OCHE approval): Revising >20% (#9)", "Level 1 (OCHE approval): Consolidation (#7)", "Level 1 (OCHE notice): Online delivery of existing program (#4)", "Level 2 (no RTP): Permanent authorization of CAS/AAS (#12)", and "Level 2 (no RTP): Exceeding 120-credit maximum (#13)". The background shows a form with fields for "Edit Request Type", "Academic F", "Effective Catalog Edition", and "Program Title".

Choose from the following options:

- **Minor program change** – this is for change of less than 20% (no OCHE submission.)
- **Level 1 (OCHE approval): Re-titling** – changing the title of a program, minor, option/concentration, or certificate – (requires Level 1 approval from OCHE - #5 in the MUS handbook.)
- **Level 1 (OCHE approval): Revising** – this is for change of more than 20% (requires Level 1 approval from OCHE - #9 in the MUS handbook.)
- **Level 1 (OCHE approval): Consolidation** – consolidating two or more existing programs (requires Level 1 approval from OCHE - #7 in the MUS handbook.)
- **Level 1 (OCHE notice): Online delivery of existing program** – offering an existing program via distance/online delivery – (requires notification to OCHE - #4 in the MUS handbook.)
- **Level 2 (no RTP): Permanent authorization of CAS/AAS** – this is the second step in establishing a new associates degree program (requires Level II approval from OCHE, but no RTP - #12 in the MUS handbook.)
- **Level 2 (no RTP): Exceeding 120-credit maximum** – (requires Level II approval from OCHE, but no RTP - #13 in the MUS handbook.)

To terminate a program or place it into moratorium, after selecting the program from the search menu, click the red “Terminate” button. A new window will open with the required fields and a green “Save and Start Workflow” button at the bottom. (Moratorium requires Level 1 notification to OCHE - #1 in the MUS handbook. Termination requires Level 1 approval from OCHE - #6 in the MUS handbook.)

3. Miscellaneous Request Management

Request to Plan (RTP)

- Please email a signature document with department chair, college dean, and any other impacted programs as a supporting document directly to [Megan Burns](#), Academic Policy Manager in the Office of the Provost.

Renewal of General Education Designation (including Writing courses)

- Please upload the completed renewal document (including signatures of department chair and college dean), syllabus, assessment reports & data, and any other required supporting documents.

This area of CourseLeaf houses several forms that fall outside the typical approval path (workflow) from either courses or programs, including RTP's and GenEd Rolling Review.

Please note that some new programs require the initial, pre-planning step called a "Request to Plan" or RTP. Only after the RTP has been approved by the Provost, President, and BOR can the Level II forms be submitted for consideration by the committees and the Senate.

In addition, this is where the rolling review for General Education Designation, including Writing Courses, can be found. While new courses seeking General Education Designation should be submitted in the [Course Inventory Management](#) area, renewals are submitted here.

Select the appropriate "request type" from the drop-down menu. This will prompt the system to open the required fields and upload/attach buttons.

Miscellaneous Request Management

Miscellaneous Request

Request Type	✓ Select... Request to Plan (RTP): New programs or units (#11 & #14) Renew GenEd or Writing designation (internal approvals only) Level 2 (after RTP): New/change to academic or administrative unit (#14) Level 2 (after RTP): New/change to center or research unit (#14) Level 2 (no RTP): Re-titling a unit (#15)
Title	

[Cancel](#) [Save Changes](#) [Admin Save](#) [Start Workflow](#)

Choose from the following options:

- **Request to Plan (RTP): New programs or units** – this is the first step to creating a new academic program or unit (requires BOR approval - #11 & #14 in the MUS handbook.)
- **Renew GenEd or Writing designation (internal approvals only)** – this is for Rolling Review submission, as well as submission of assessment reports and data for courses with provisional status – no OCHE approval.
- **Level 2 (after RTP): New/change to Academic or Administrative Unit** – these are the Level 2 forms used after the RTP is approved (requires OCHE approval - #14 in the MUS handbook.)
- **Level 2 (after RTP): New/change to Center or Research Unit** – these are the Level 2 forms used after the RTP is approved (requires OCHE approval - #14 in the MUS handbook.)
- **Level 2 (no RTP): Re-titling a unit** – this is for retitling centers, research units, academic units, or administrative units – these are the Level 2 forms (requires OCHE approval, no RTP - #15 in the MUS handbook.)

4. [Pages Pending Approval](#)

This area of CourseLeaf will most commonly be accessed by the link that approvers (chair, dean, committees, senate, and provost) will receive in an email notification from the CourseLeaf platform. Due to the automated nature of these email notifications they are easily confused as spam. The “from” name will be **CourseLeaf Curriculum Management**, and the subject line will begin with [CIM Courses], [CIM Programs], or [CIM Misc] depending upon the type of proposal being noticed. The subject line will also include information regarding the type of notice and to whom it is directed.

From: CourseLeaf Curriculum Management <courseleaf@notify.courseleaf.com>
Sent: Monday, July 24, 2023 5:14 PM
To: FacultySenate@mso.umt.edu
Subject: [CIM Misc] Review Request: Faculty Senate

There is a proposal that requires your review and approval before it can continue forward in the system including

Approvers can also access the list of proposals in the approval queue via [Pages Pending Approval](#).

The upper left-hand box will contain the list of proposals waiting in the approval queue. When one of the proposals is selected (or when the link in the notification email is clicked), the proposal will appear in the lower half of the screen.

On the right-hand side, the workflow and approval path will appear showing the current status of the proposal.

The approver has the option to reject the proposal by using the red “Rollback” button. A window will open requiring the approver to state their reasons for the rollback. The proposal may be rolled back to any previous step. This action will trigger an email notification for the person to whom the proposal is rolled back.

The approver also has the option to approve the proposal by clicking the green “Approve” button. This action will trigger an email to the next person in the workflow. If the approver wishes to add comments to the proposal, they should use the green “Add Comment” button *prior* to approving. **Please remember that clicking this “Approve” button is equivalent to signing the document.**

It is currently recommended to disregard the blue “Edit” button. If the approver feels that edits should be made to the proposal, they should use the “Rollback” button and provide their suggested edits to the proposer in their rollback justification.

For questions and to provide feedback, please contact [Troy Morgan](#) in the Registrar’s office, or [Megan Burns](#) in the Provost’s office.