



User Guide

University of Montana

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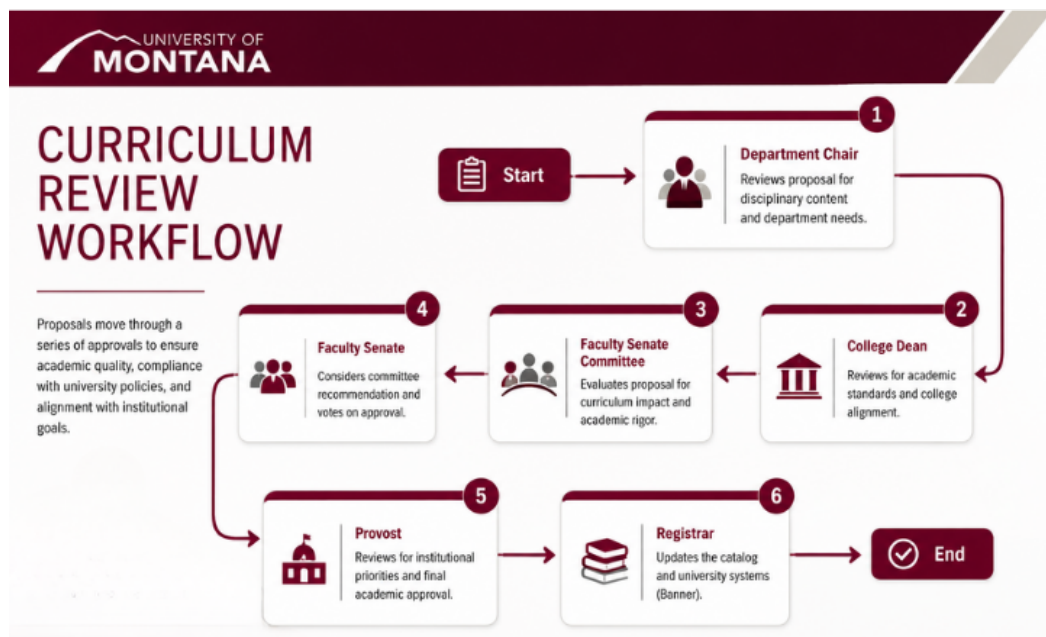
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Introduction

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 –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.

CourseLeaf 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:



Curriculum Approval Process Resources

- Curriculum Review - [Website](#)
- Faculty Senate Procedures – [Website](#)
- [MUS - Academic Affairs Procedural Guidebook](#)

CourseLeaf Links

CourseLeaf can be accessed through four different entry points, depending on the type of proposal being submitted. Please note that each of the four entry points will ask for your UM Single Sign-On (SSO) authentication:

NETID LOGIN

Accessibility 406-243-HELP(4357)

For your security, please close your web browser when not in use.

NetID

Password

What is my NetID?

I don't know my password!

Sign In

COURSELEAF

CourseLeaf

Leapfrog Technologies CourseLeaf

Duo Now Available!

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!

Learn More

Course Inventory Management – <https://umt-next.courseleaf.com/courseadmin/>

- Propose new courses (new General Education designation may be selected within the proposal)
- Propose modifications to existing courses (General Education designation may be selected within the proposal)

Program Inventory Management – <https://umt-next.courseleaf.com/programadmin/>

- Request to Plan (RTP) – New Programs
- Propose new programs (including degrees, majors, minors, certificates, etc.)
- Propose modifications to existing programs

Miscellaneous Request Management – <https://umt-next.courseleaf.com/miscadmin/>

- Request to Plan (RTP) – Centers/Institutes
- Renew General Education or Writing Designation
- Ad-Hoc Requests
- Articulation Agreements

Approve Page – <https://umt-next.courseleaf.com/courseleaf/approve/>

- Approve – approve the proposal and move it forward in the review process
- Rollback – send proposal back to any step of the approval workflow, must add comments.

Course Inventory Management

Course Inventory Management is used to create, modify, and terminate courses within the University catalog. Users will use this section when proposing new courses or making changes to existing courses.

New Courses

To propose a NEW course, begin with clicking the green “Propose New Course” button.



Course Inventory Management

You are logged in as ef240672e  [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
AAST 225	Race, Inequality & Education		edited
ANTY 468	Archaeology and Collections Practicum	ASCRC	added
ANTY 556	Historical Archaeology	Graduate Council	added

A new window will open. Course information can be entered in the blank fields (required fields are outlined in red):



Course Inventory

New Course Proposal

Course Information

Subject Code

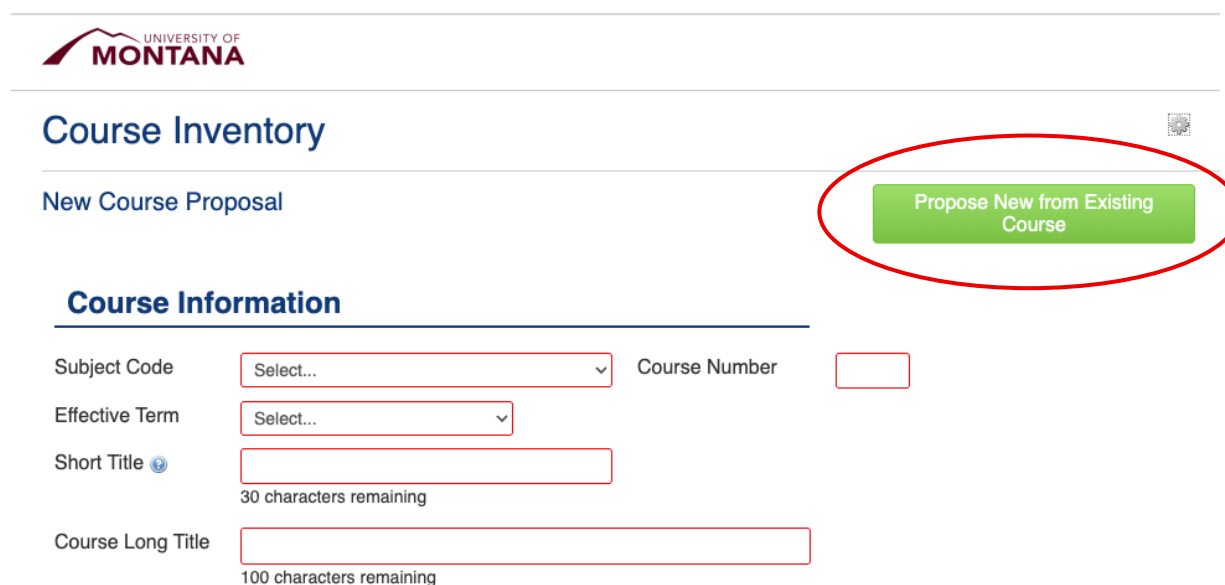
Course Number

Effective Term

Short Title
30 characters remaining

Course Long Title
100 characters remaining

Or the fields can be pre-populated with information from an existing course. For this option, click the green “Propose New from Existing Course” button.



UNIVERSITY OF MONTANA

Course Inventory

New Course Proposal

Propose New from Existing Course

Course Information

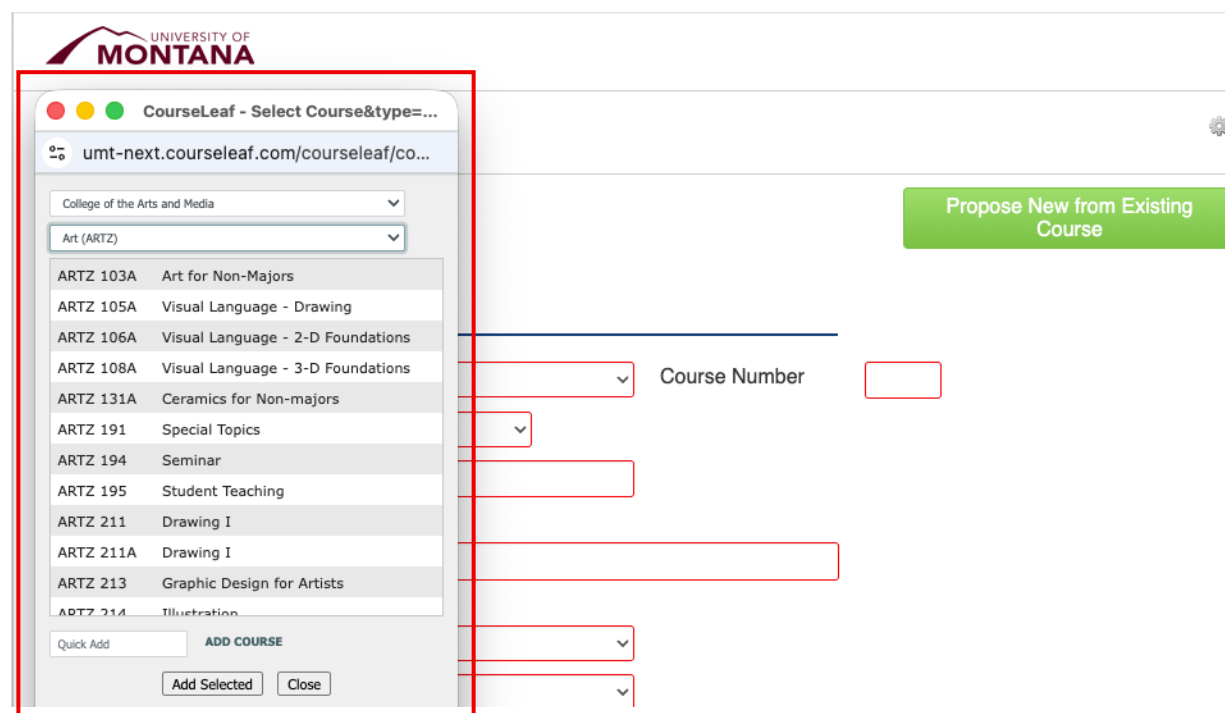
Subject Code Course Number

Effective Term

Short Title 30 characters remaining

Course Long Title 100 characters remaining

A search window will open, Select the corresponding College and Subject code from the list of current courses:



UNIVERSITY OF MONTANA

CourseLeaf - Select Course&type=...

umt-next.courseleaf.com/courseleaf/co...

College of the Arts and Media

Art (ARTZ)

ARTZ 103A	Art for Non-Majors
ARTZ 105A	Visual Language - Drawing
ARTZ 106A	Visual Language - 2-D Foundations
ARTZ 108A	Visual Language - 3-D Foundations
ARTZ 131A	Ceramics for Non-majors
ARTZ 191	Special Topics
ARTZ 194	Seminar
ARTZ 195	Student Teaching
ARTZ 211	Drawing I
ARTZ 211A	Drawing I
ARTZ 213	Graphic Design for Artists
ARTZ 214	Illustration

Quick Add

Add Selected Close

Propose New from Existing Course

Course Number

Select an appropriate/similar course to use as the template for the new course. The fields will populate with the existing information. Each field should be carefully reviewed to match the new course 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

New Course Proposal

[Propose New from Existing Course](#)

Course Information

Subject Code

ARTZ - Art

Course Number

[Course Numbers in Use](#)

Effective Term

Select...

Short Title

The Art of Digital Photography

0 characters remaining

Course Long Title

The Art of Digital Photography

70 characters remaining

[Propose New from Existing Course](#)

A secondary screen will open displaying all active and deleted courses with that same subject code:



Course Inventory

New Course Proposal

[Propose New from Existing Course](#)

Course Information

Subject Code

ARTZ - Art

Course Number

[Course Numbers in Use](#)

Effective Term

Select...

Short Title

The Art of Digital Photography

0 characters remaining

Course Long Title

The Art of Digital Photography

70 characters remaining

[Propose New from Existing Course](#)

Course Numbers In Use for ARTZ - Art

Active

deleted

Course Code	Title
ARTZ 103A	Art for Non-Majors
ARTZ 105A	Visual Language - Drawing
ARTZ 106A	Visual Language - 2-D Foundations
ARTZ 108A	Visual Language - 3-D Foundations
ARTZ 131A	Ceramics for Non-majors
ARTZ 191	Special Topics
ARTZ 194	Seminar
ARTZ 195	Student Teaching
ARTZ 211	Drawing I
ARTZ 211A	Drawing I
ARTZ 213	Graphic Design for Artists
ARTZ 214	Illustration
ARTZ 221	Painting I
ARTZ 221A	Painting I

Once all fields are filled out, attach a copy of the course syllabus by clicking the green “Attach File” button. The proposal can be saved by clicking the “Save Changes” button at the bottom of the form, allowing the proposer to return to the proposal to make any edits before submitting for review.

When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process. This will notify the person on the first step of the workflow to review the proposal.

Cancel

Save Changes

Start Workflow

Editing Existing Courses

To propose changes to an existing course, begin by searching for the course. Follow the instructions on the Course Inventory Management window to successfully use the search function, type in the subject code, or the subject code and course number (e.g., ARTZ or ARTZ 384).

NOTE: Editorial Catalog Changes that do not require approvals can be processed through CourseLeaf or can be emailed to [Troy Morgan](#), Associate Registrar. Please refer to [Faculty Senate Procedure 210.30.3 Editorial Catalog Changes](#), for a detailed list of what is considered an editorial change.

Course Inventory Management

You are logged in as ef240672e [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.

ARTZ

Search

☐ Archive - OR - ☐ History

Propose New Course

Quick Searches...

Course Code	Title	Workflow	Status
ARTZ 103A	Art for Non-Majors		deleted
ARTZ 105A	Visual Language - Drawing		
ARTZ 106A	Visual Language - 2-D Foundations		deleted
ARTZ 108A	Visual Language - 3-D Foundations		
ARTZ 131A	Ceramics for Non-majors		
ARTZ 191	Special Topics		
ARTZ 194	Special Topics		

Select the course from the list then click the green “Edit Course” button on the right side of the window.

☐ Archive - OR - ☐ History

Course Code	Title	Workflow	Status
ARTZ 371	Printmaking II		
ARTZ 372	Printmaking II- Lithography		deleted
ARTZ 380	Data Arts		deleted
ARTZ 383	Analog Photography		
ARTZ 384	Photography II: Theory, Criticism, and Practice		
ARTZ 385	The Art of Digital Photography		deleted
ARTZ 388	Alternative Process Photography		deleted

[Preview Workflow](#)

Viewing: **ARTZ 384 : Photography II: Theory, Criticism,**

A new window will open with the current course record. Select the request type from the “Edit Request Type” dropdown menu and make edits directly to the fields on the form.

Course Inventory

Editing: **ARTZ 384: Photography II: Theory, Criticism, and Practice**

Request Type

Edit Request Type

Select...
Substantive Change
Editorial Change

Course Information

Subject Code
Course Number

Effective Term

Short Title

A revised syllabus should be uploaded using the green “Attach File” button. Click “Save Changes” in order to return to the proposal to make further edits prior to submission, or “Start Workflow” to start the review process.

Terminating Existing Courses

To propose termination or deletion of a course from the catalog, begin by searching for the course as above. Select the course from the list and click the red “Terminate” button on the left side of the window.

☐ Archive ☐ History - OR -

Course Code	Title	Workflow	Status
ARTZ 371	Printmaking II		
ARTZ 372	Printmaking II- Lithography		deleted
ARTZ 380	Data Arts		deleted
ARTZ 383	Analog Photography		
ARTZ 384	Photography II: Theory, Criticism, and Practice		
ARTZ 385	The Art of Digital Photography		deleted
ARTZ 388	Alternative Process Photography		deleted

[Preview Workflow](#)

Viewing: **ARTZ 384 : Photography II: Theory, Criticism,**

A secondary window will open. Complete the form and click the green “Start Workflow” button to begin the review process.



Inactivating: **ARTZ 384**

End Term

Justification for this request

Program Inventory Management

Program Inventory Management is used to create, modify, and terminate programs within the University catalog. Users will use this section when proposing new programs or making changes to existing programs.

Request to Plan (RTP) – New Programs

Consultation with the Office of the Provost is required prior to submitting a Request to Plan for a new program.

New Program Proposal Propose New from Existing Program

Request Type

Form Type Request to Plan (RTP): New Programs

Have you consulted with the Office of the Provost about this Request to Plan?
☐ Yes ☐ No

New Programs

To propose a NEW program (degrees, majors, minors, certificates, etc.), begin with clicking the green “Propose New Program” button.

Search, edit, add, and inactivate programs.

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 Program Code, Title, Workflow step and CIM Status.

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

Search ☐ History - OR - Propose New Program Quick Searches...

Number of Program	Program Name	Workflow	Status
1	Associate of Arts		
2	Associate of Arts with concentration in Psychology	ASCRC	deleted

A secondary window will open. Select one of the forms from the “Form Type” dropdown menu.

New Program Proposal Propose New from Existing Program

Request Type

Form Type ✓ Select...
Request to Plan (RTP): New Programs
Level I & Level II Requests

NOTE: Only one option may be selected per proposal. If you are proposing multiple changes include them in the proposal summary and ensure you are submitting all required forms for each request type.

Select one: Select...

For Level I and Level II Requests select one of the following options:

- Level I (OCHE Notice):
 - Withdrawing a Postsecondary Educational Program from Moratorium
 - Establishing a Campus Certificate < 29 Credits
 - Establishing a B.A.S./A.A./A.S. Area of Study
- Level I (OCHE Approval):
 - Establishing a New Minor where there is a Major
 - Consolidating Existing Postsecondary Educational Programs
 - Establishing a Temporary C.A.S. or A.A.S. Degree Program
- Level II (after RTP):
 - Establishing a New Postsecondary Educational Program
- Level II (OCHE Approval):
 - Permanent Authorization for a Temporary C.A.S. or A.A.S. Degree Program

Program Management

The screenshot shows the 'New Program Proposal' form. A red oval highlights the 'Request Type' dropdown menu, which is open, showing a list of options. The options are:

- Select...
- Level I (OCHE Notice): Withdrawing a Postsecondary Educational Program from Moratorium
- Level I (OCHE Notice): Establishing a Campus Certificate <29 Credits
- Level I (OCHE Notice): Establishing a B.A.S./A.A./A.S. Area of Study
- Level I (OCHE Approval): Establishing a New Minor where there is a Major
- Level I (OCHE Approval): Consolidating existing Postsecondary Educational Programs
- Level I (OCHE Approval): Establishing a Temporary C.A.S. or A.A.S. Degree Program
- Level II (after RTP): Establishing a New Postsecondary Educational Program
- ✓ Level II (OCHE Approval): Permanent Authorization for a Temporary C.A.S. or A.A.S. Degree Program

The form also includes a 'Form Type' field, a 'NOTE: Only one option...' warning, and a 'Propose New from Existing' button.

Attachments

Please complete and attach the appropriate OCHE form(s) to accompany this proposal. All required forms can be found on the

The proposal can be saved by clicking the “Save Changes” button at the bottom of the form, allowing the proposer to return to the proposal to make any edits before submitting for review.

When the proposal is complete, including uploading all required OCHE forms and supporting documents, click the green “Start Workflow” button at the bottom of the form to begin the review process.

The screenshot shows the bottom of the form with three buttons: a red 'Cancel' button, a grey 'Save Changes' button, and a green 'Start Workflow' button.

Editing Existing Programs

To propose changes to an existing program, begin by searching for the program. Follow the instructions on the Program Inventory Management window to successfully use the search function.



Program Management

You are logged in as ef240672e  [Help](#)

Search, edit, add, and inactivate programs.
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 Program Code, Title, Workflow step and CIM Status.
Quick Searches provides a list of predefined search categories to use.

☐ History - OR -

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

Select the program and click the green “Edit Program” button on the right side of the window.

Number of Program	Program Name	Workflow	Status
114	BFA in Game Design and Interactive Media		
115	BFA in Theatre with concentration in Design and Technology		
116	BFA in Theatre with concentration in Acting for Film and Theatre	Degree Works	edited
117	BFA in Theatre with concentration in Musical Theatre Performance	Degree Works	edited
118	BFA in Art		
119	BFA in Media Arts		

Terminate

Export to PDF 

Export to Word 

Edit Program

Preview Workflow

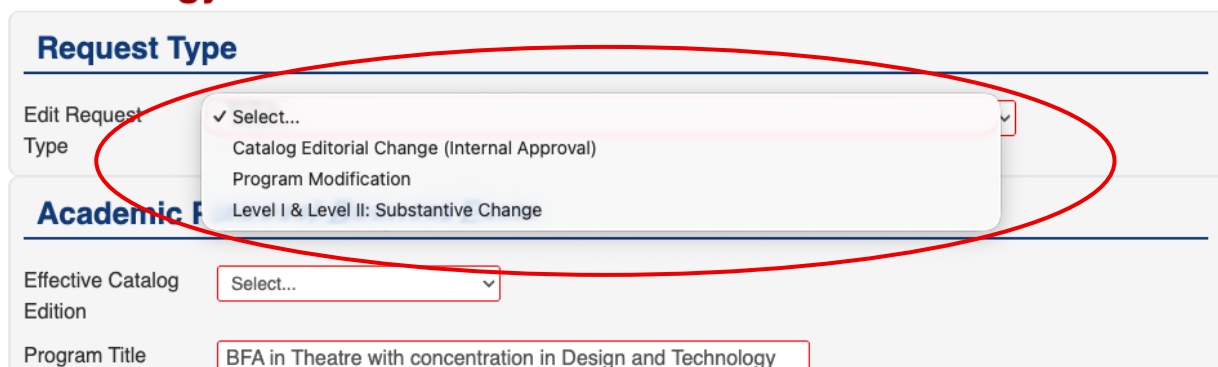
Viewing: **115 : BFA in Theatre with concentration in Design and Technology**

History

1 Feb 16, 2023 by

A secondary window will open. Select a form from the “Edit Request Type” dropdown menu.

Editing: **115: BFA in Theatre with concentration in Design and Technology**



Request Type

Edit Request Type

- ✓ Select...
- Catalog Editorial Change (Internal Approval)
- Program Modification
- Level I & Level II: Substantive Change

Academic I

Effective Catalog Edition: Select...

Program Title: BFA in Theatre with concentration in Design and Technology

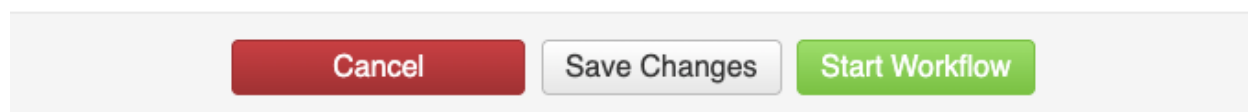
NOTE: Editorial Catalog Changes that do not require approvals can be processed through CourseLeaf or can be emailed to [Troy Morgan](#), Associate Registrar. Please refer to [Faculty Senate Procedure 210.30.3 Editorial Catalog Changes](#), for a detailed list of what is considered an editorial change.

For Level I & Level II: Substantive Change Requests select one of the following options from the “Type of Request” dropdown menu:

- Level I (OCHE Approval):
 - Consolidating Existing Postsecondary Education Program
 - Re-Titling an Existing Postsecondary Education Program
 - Revising Postsecondary Educational Program > 20%
- Level I (OCHE Notice):
 - Offering Existing Postsecondary Educational Program via Distance or Online Delivery
- Level II (no RTP):
 - Exceeding 120-Credit Maximum for Baccalaureate Degree
 - Permanent Authorization of a Temporary C.A.S. or A.A.S. Degree Program

The proposal can be saved by clicking the “Save Changes” button at the bottom of the form, allowing the proposer to return to the proposal to make any edits before submitting for review.

When the proposal is complete, including uploading all required OCHE forms and supporting documents, click the green “Start Workflow” button at the bottom of the form to begin the review process.



Cancel Save Changes Start Workflow

Terminating Existing Programs

To propose termination or moratorium of a program, begin by searching for the program as above. Select the program from the list and click the red “Terminate” button on the left side of the window.

☐ History - OR -

Number of Program	Program Name	Workflow	Status
114	BFA in Game Design and Interactive Media		
115	BFA in Theatre with concentration in Design and Technology		
116	BFA in Theatre with concentration in Acting for Film and Theatre	Degree Works	edited
117	BFA in Theatre with concentration in Musical Theatre Performance	Degree Works	edited
118	BFA in Art		
119	BFA in Media Arts		

[Preview Workflow](#)

Viewing: **115 : BFA in Theatre with concentration in**

A secondary window will open. Complete the form and click the green “Save and Start Workflow” button to begin the review process.



Program Termination/Moratorium Form

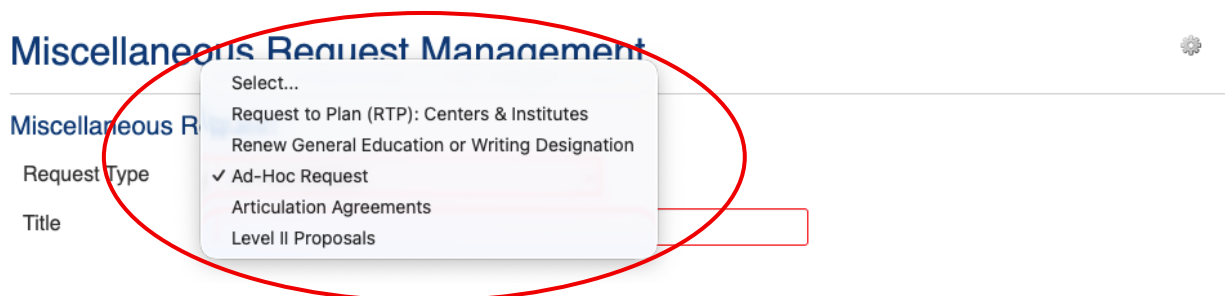
Inactivating: **115: BFA in Theatre with concentration in Design and Technology**

Please consult the **Office of the Provost's curriculum guidelines** before submitting this form. Once this form is submitted, it will be automatically routed to your Department Chair, Dean, Faculty Senate, and the Provost for review. The form will be returned to you if any changes are required.

Is this program
being terminated or
placed in
moratorium?

Miscellaneous Request Management

The Miscellaneous Request Management section contains forms for requests that fall outside the standard CourseLeaf proposal workflows. Start by selecting the appropriate form from the “Request Type” dropdown menu.

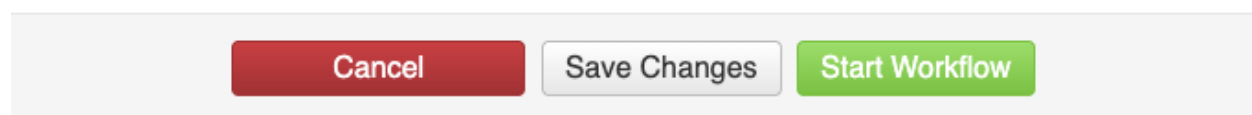


The screenshot shows the 'Miscellaneous Request Management' page. A red circle highlights the 'Request Type' dropdown menu, which is open and showing the following options: 'Select...', 'Request to Plan (RTP): Centers & Institutes', 'Renew General Education or Writing Designation', '✓ Ad-Hoc Request', 'Articulation Agreements', and 'Level II Proposals'. The 'Ad-Hoc Request' option is currently selected. Below the dropdown is a text input field for 'Title'.

Request to Plan (RTP) – Centers/Institutes

Consultation with the Office of the Provost is required prior to submitting a Request to Plan for a new Center or Institute. Ensure all forms and supporting documents required by OCHE are attached to the proposal.

When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process.



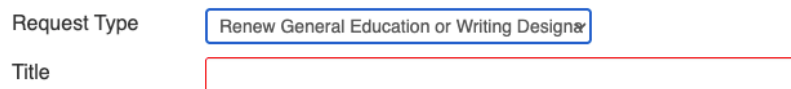
The screenshot shows the bottom of the form with three buttons: a red 'Cancel' button, a grey 'Save Changes' button, and a green 'Start Workflow' button.

Renew General Education or Writing Designation

This form is used to submit the renewal form for all General Education designations (including writing designations).

Miscellaneous Request Management

Miscellaneous Request



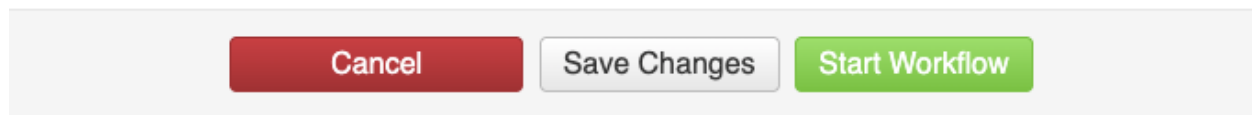
The screenshot shows the 'Miscellaneous Request' form. The 'Request Type' dropdown menu is set to 'Renew General Education or Writing Designation'. Below it is a text input field for 'Title'.

Please include the following in the proposal title: Course Prefix, Course Number, Course Name, and Rolling Review. For GenEd, what Group is being reviewed, for Writing whether it is a WAC or WID review.

Example: ANTY 122S: Race and Minorities – Rolling Review: Social Sciences
ANTY 254X: Archaeological Wonders of the World – Rolling Review: WAC

Once all fields are filled out, attach a copy of the course syllabus by clicking the green “Attach File” button. The proposal can be saved by clicking the “Save Changes” button at the bottom of the form, allowing the proposer to return to the proposal to make any edits before submitting for review.

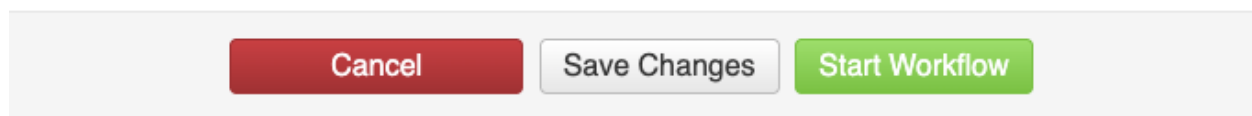
When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process:

A horizontal bar containing three buttons. From left to right: a red button with the text "Cancel", a light gray button with the text "Save Changes", and a green button with the text "Start Workflow".

Articulation Agreements

This form is used to submit Affiliation Agreements, Articulation Agreements, and Memorandum of Understanding (MOU). Attach a copy of the agreement including contact information for the partnering institution.

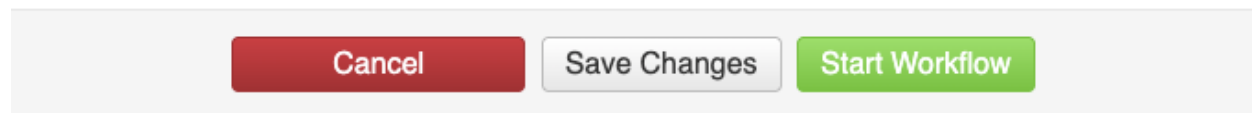
When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process:

A horizontal bar containing three buttons. From left to right: a red button with the text "Cancel", a light gray button with the text "Save Changes", and a green button with the text "Start Workflow".

Level II Proposals

This form is used to propose changes to academic or administrative units and centers/institutes. Ensure all forms and supporting documents required by OCHE are attached to the proposal.

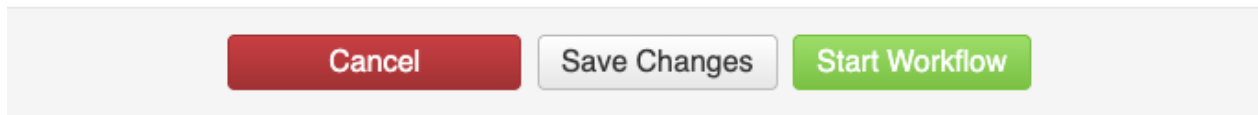
When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process:

A horizontal bar containing three buttons. From left to right: a red button with the text "Cancel", a light gray button with the text "Save Changes", and a green button with the text "Start Workflow".

Ad-Hoc Requests

This form is used to propose any academic change that fall outside the existing CourseLeaf request forms. Attach any supporting documents and ensure there is a contact person listed on the proposal.

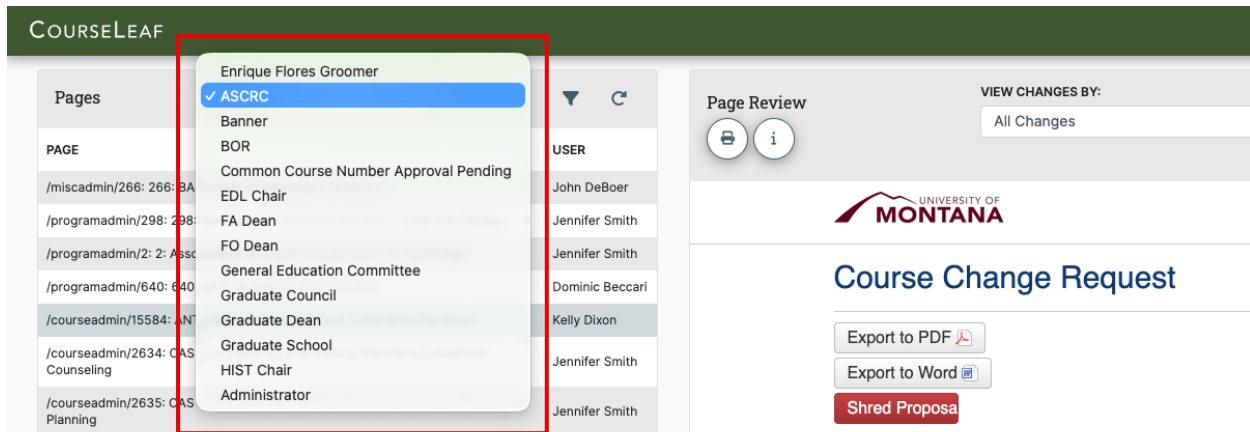
When the proposal is complete, click the green “Start Workflow” button at the bottom of the form to begin the review process:

A horizontal bar containing three buttons. From left to right: a red button with the text "Cancel", a light gray button with the text "Save Changes", and a green button with the text "Start Workflow".

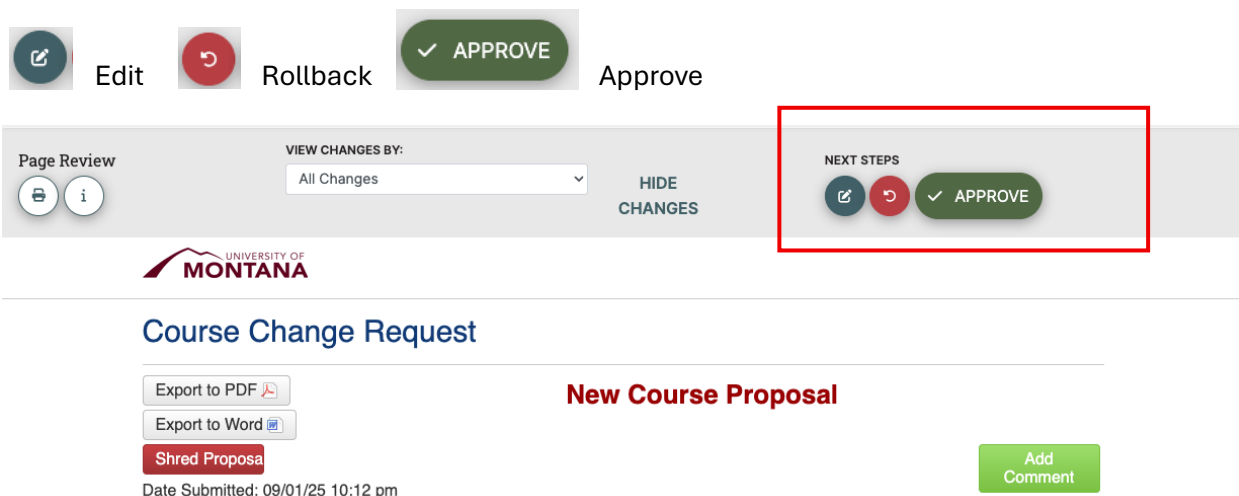
Cancel Save Changes Start Workflow

Approve Page

This page is used to review, approve, or rollback proposals throughout the workflow. Department Chairs, Committee Chairs, College Deans, Administrators, and other users assigned to a workflow step will receive an email notification with a link to this page. To begin, select your role from the Role dropdown menu in the upper left corner of the window. Only roles for which you have approval privileges will be displayed. Once you have selected your role, you can review the proposals awaiting your action.



Once a proposal is selected, you will be able to review it. Using the three buttons on the top right of the window, an approver will be able to:



Need assistance? If you have questions about CourseLeaf, proposal routing, workflow, or curriculum forms, please contact [Enrique Flores Groomer](#), Program Manager for Curriculum and Faculty Senate.