ĀTM | **TEXAS A&M**
U N I V E R S I T Y

# Texas A&M University Catalogs Quick Step Guide for Updates

The Texas A&M University catalogs are housed and updated through a proprietary online workflow system created by Leepfrog Technologies® entitled CourseLeaf CAT. To obtain access to update catalog content, permission must be obtained by the leadership in your office, department or college. Please contact us if you need help ascertaining who that content approver might be.

## What information can be edited during the catalog update process?

### General Information
All general information (e.g., narrative content that does not contain program requirements) in the catalogs may be updated when the catalogs go live for edits in September. This includes the information contained in the preliminary sections of the catalogs concerning admission, financial aid, services, etc.  This also includes any narrative information included in a department or college Overview Tab.

### Narrative Information for Departments and Colleges
Narratives in Overview Tabs can be updated via the site nextcatalog.tamu.edu.  Degree information contained in the catalogs' Program or Additional Requirements Tabs is imported from the Curricular Approval Request System (CARS) and *cannot* be edited through the site nextcatalog.tamu.edu.  Because all academic requirements are imported from CARS, they must be submitted through CARS by the deadline.

## What information cannot be edited during the catalog update process?

### Can courses or academic requirements be updated through the catalog editing system? — No
Course information contained in the catalogs is imported from COMPASS and cannot be edited through the site nextcatalog.tamu.edu. Courses and changes to courses must be submitted through CARS course forms and are imported into the University catalogs upon approval.  Program requirements must be submitted and edited via CARS program forms and are imported into the University catalogs upon approval.

### Can faculty data be updated through the catalog editing system? — No
Faculty information is updated by Faculty Affairs and is provided to our office for the catalogs in a single, static file for upload before the catalogs are published.  Updates must be addressed with that office.

## How is new content added to catalogs?  How is inactivated content removed from catalogs?
Programs and courses are added to and removed from the University catalogs by the Curricular Services staff.

### How do I obtain access to make updates to catalog content?

To make updates in the University Catalogs, you must obtain access and a workflow assignment. Each section of catalog content has a specific workflow trail that takes it through the appropriate offices for updates.

- To gain access to General Information use the [CourseLeaf CAT Account Form for General Information](#).
- To gain access to information for an academic department or college, contact a college representative listed [here](#).

### When I obtain access, what does that mean?

When access to update the University Catalogs is given, you are assigned a place in workflow. This workflow will be assigned to you as an individual using your name, or it will be assigned to you by role. Workflow functions are the same no matter how you are assigned.

### There are two functions in workflow. What is the difference between an Owner Role and an Approver Role?

- The Owner Role is assigned to individuals reviewing content first in workflow. This role submits the content into workflow.
- The Approver Role is issued to individuals reviewing the content after the owner. This individual may make additional changes, push the changes that have been made by approving the content forward in workflow, or rolling content back if it is deemed unacceptable or needs further revision.
  - o Department-level content is reviewed by the department and then at the dean's level, before moving to completion. Graduate catalog content is reviewed by the Graduate and Professional School before publishing.

NOTE: Individuals can hold multiple roles at the owner and/or approver level.

### Now that I have been assigned a role, what steps do I take?

### Page Owners

Locate the email sent from our office referencing catalog updates. The first email is sent in September, and reminder emails are sent monthly until each page has started workflow.

1. In these emails, an excel file with spreadsheets containing role assignments and catalog pages with corresponding workflow are attached. Workflow assignments are made by name or Role (i.e., Joe Aggie or ACCT Owner UG).
2. Open the Owner Workflow and Roles spreadsheet.
3. Find your assigned role(s) in the Roles tab by completing a search using the Find All function. Sometimes individuals are assigned multiple roles/pages within different capacities.
4. Highlight each entry that populates.
5. Go to the Workflow tab in the spreadsheet.

6. Again, search by your name *and* any roles you have been assigned by using the Find All function.
7. Highlight each entry that populates.
8. Once all your pages are identified and highlighted, you might want to consider utilizing the sort command in order to group your pages together for easy reference.
9. Open your internet browser. We suggest Chrome or Microsoft Edge.
10. The left-hand column in your Workflow spreadsheet contains links to each page. Click the URL link to go to the assigned page for updates. If for any reason the link is broken, copy the URL from the spreadsheet and paste it in the browser address field.
11. You will be prompted to log into the catalog editing site by using your NetID. The CAS authenticated system is case sensitive.
12. When your catalog page appears in the browser, click on the Edit Page icon in the upper-left corner.
13. Top and bottom toolbars should appear.
14. Click the Page Body button with the pencil icon in the top toolbar or on the page, and the editing window should appear.
15. Update the content and click OK. (Do not click Start Workflow here, if the option appears.)
16. If your page has tabs, select the appropriate tab name displayed in the top toolbar so that the correct editing window appears for that text--you may need to use the arrows to scroll left or right.
17. Review your changes.
18. Once you are done editing, press the green Start Workflow button in the bottom toolbar to submit your page to the next person in workflow. You must click the Start Workflow button for each page you are assigned in the spreadsheet.

## Page Approvers

Each time a page is ready for you to review and approve, you should receive a CourseLeaf automated email notification. Open the email and click on the link provided. It will take you to the Approver's Console.

You may log in to the Approver's Console https://nextcatalog.tamu.edu/courseleaf/approve at any time.

1. In the Approver's Console, your name will appear in the "Your Role" drop down menu at the top of the page. This indicates you are logged in to the system. For your items to appear in the "Pages Pending Review" window, you must select your role or your name from the drop-down menu.
2. If your role or name does not appear in the "Your Role" drop-down menu, there is nothing in your queue to approve at this time. Check back again later. Remember, assigned content will not appear all at once. Pages will trickle in as completed in the step preceding yours.
3. After selecting your role or name, pending items will appear in the "Pages Pending Review" window.
4. Select an item in the list.
5. The changes for that page will appear in the section below with red and green markup. Green will indicate new content added and red strikethrough will indicate deleted content.
6. You may make alterations to the page by clicking the Edit button, then clicking the Page Body button in the tool bar that appears.
   a. You may also have tabs that you need to select and update content in. Select each tab name in the tool bar to access the content.
7. Once your changes are complete, click the Save Changes button.
8. After reviewing your changes and you are ready to move the page forward, click Approve.
9. In addition to approving the page, you also have the option to click the Rollback button and return this content to a previous step in the workflow, if you feel it is necessary. Most Approvers utilize this function only if they are requested to do so by a person who advanced the page accidentally.
10. If you have several pages to approve, repeat these steps. You must approve each page, even if there are no changes.

## Reminders

**To find your assigned roles:**

1. Open the workflow spreadsheet attached to the reminder emails sent from our office monthly.
2. Find the Roles tab and open it.
3. Use the Search All function and search for your last name.

**To find your assigned workflow:**

4. Open the workflow spreadsheet attached to the reminder emails sent from our office monthly.
5. Find the Workflow tab and open it.
6. Use the Search All function and search for your role.
7. Highlight the items.
8. Use the Search All function and search for your name.  (Content can be assigned to an individual. )
9. Highlight the items.

Once you have found the content you are responsible for, you might want to keep a list for reference, especially if you are responsible for a large amount of information and want to keep track of each section.

- Content for Page Owners can be reviewed and submitted into workflow immediately.
- Content for Approvers will become available at various times based on when it was reviewed and submitted by the owner. You will be notified by email when to go to the console to review it.
- You may go to https://nextcatalog.tamu.edu/courseleaf/approve at any time.

*Please visit our website for more information on catalog training.*
**https://registrar.tamu.edu/curricular-services/catalog**
**catalog@tamu.edu**
**Curricular Services, Office of the Registrar**
**(979) 845-8201**