# CAT CHEAT SHEET:
Instructions for Working with CAT

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Overview

The big picture
The CourseLeaf system includes Course Inventory Management (CIM) and Catalog (CAT), which enables universities to manage their curriculum and degree requirements in addition to an Academic Catalog. The courses and programs managed through CIM feed into the Catalog. The KU Lawrence and KUMC campuses have a shared CourseLeaf system, but each campus manages its own entries with Lawrence being the final approver and the publisher for the Academic Catalog.

The Academic Catalog is a collection of all policies and details for academic programs. Under each larger category of the Schools, there is a general page for each department. This department page has a description of the department as well as contact information. Within each department, there is another page for each program offered. Those program pages generally have five tabs: Overview, Admissions, Degree Requirements, Plan of Study, and Technical Standards.

Students, faculty, and staff will refer to the policies and degree requirements of the Academic Catalog as a contract with the students. The semester that a student enters their program binds them to their program’s degree requirements as outlined in the catalog. Additionally, the Office of Graduate Studies has a comprehensive section outlining academic policies related to graduate academic work. Therefore, it is important to have the most accurate information possible when updating the Catalog.

This cheat sheet provides an overview of the Academic Catalog structure as well as instructions for accessing, editing, and approving Catalog pages.

Timeline and workflow
Each Academic Catalog is valid on a fall through summer cycle. For example, the 2018-2019 Academic Catalog begins in fall semester 2018 and goes through spring and summer semester 2019. Each Academic Catalog is archived for reference purposes. It is important to note that when there is a potential issue with an academic plan or policy, the departments and the Office of Graduate Studies will reference the catalog for the semester that the student entered their program. The catalog archives are usually included as a hyperlink at the bottom of the degree requirements tab of a page under Other years’ catalog. The archived catalogs can also be found here:

https://catalog.ku.edu/archives/

Typically the Catalog is opened on September 1st (or the first working day of September) for editing by the relevant users. The Office of Graduate Studies begins the workflow for each catalog page, sending the pages to the departments for editing. At this time, the Catalog editors across the campuses have access to edit their respective pages.

There is a workflow associated with approval of the Catalog pages. However, the Catalog workflow is different than the workflow for CIM Courses and Programs approvals. It is important for departments to be familiar with the differences of the workflows for their department. Typically, the department’s Chair is not included in the Catalog workflow. That said, consulting with Chairs is encouraged throughout the process of updating catalog pages. This consultation would be an internally designed step rather than a step in the system’s workflow.
All Catalog pages are due to the Office of Graduate Studies by the first Friday of January. At that time, the Catalog pages are reviewed by staff and the Dean in the Office of Graduate Studies. If there are issues, the pages may be rolled back to the department for review. The department is then responsible for editing and continuing the workflow to return the page to the Office of Graduate Studies. Reminders will be sent for outstanding pages.

The Registrar’s Office at KUMC gives the final approval of each page before sending to KU Lawrence. All pages from KUMC are ultimately reviewed by The KU Lawrence Registrar’s Office. Their office officially publishes the Catalog on April 1st (or the first working day of April) each year.

More details are included later regarding a typical workflow and the users associated with each role.

Catalog page structure and terms
Pages are the umbrella structure within the Catalog. There are individual pages for each department and each program. Within a page, there are sub-parts to the page, which are known as tabs.

On a typical program page, there are five tabs: Overview, Admissions, Degree Requirements, Plan of Study, and Technical Standards.

Key contacts for the CourseLeaf system
For questions or concerns regarding the CourseLeaf system, contact the following individuals at KUMC. Those who contact the Lawrence office will be redirected back to the KUMC office.

Carrie Scala  
Associate Registrar, Registrar’s Office  
cscala@kumc.edu

Val Abbott  
Sr. Coordinator, Office of Graduate Studies  
vabbott@kumc.edu
Getting Started

Links to CAT system
It is recommended to save or bookmark the CAT links for easy access in the future.

- Academic Catalog
  - https://next.catalog.ku.edu/
- Approval Page
  - https://next.catalog.ku.edu/courseleaf/approve/

Obtaining a CourseLeaf ID
Each user will need a KU-Lawrence ID and password to access the system. Please contact Carrie Scala (cscala@kumc.edu) or Val Abbott (yabbott@kumc.edu) for assistance with obtaining a user ID from KU-Lawrence.
Catalog home page
The following link enables access to edit in the Catalog. The top left corner displays the Edit Page button that will activate editing tools on the pages for which the user has permission to update (i.e., your department’s pages).

https://next.catalog.ku.edu/

The Academic Units listed on the left side bar list all units across the Lawrence, Edwards, Wichita, and KUMC campuses.

On the far right side of the homepage are Related Links for additional information on services and academic policies.

![Image of the Catalog home page](image_url)

Academic Units
There are five key Academic Units for the KUMC users.

1. Health Professions. This contains all programs under the School of Health Professions.
2. Medicine (M.D. & Graduate Degrees). This contains all graduate programs under the School of Medicine as well as the M.D. program. However, the M.D. program is not something that is managed through the Office of Graduate Studies.
3. Nursing. This contains all programs under the School of Nursing.
4. Medical Center Campus Interdisciplinary Studies. This contains the Health Informatics programs.
5. Office of Graduate Studies, Medical Center Campus Students. This contains all policies and regulations specific to graduate students at the KUMC campus.

By selecting one of the Academic Units, a home page for the respective School opens and typically has an School overview as well as a listing of all departments and affiliated programs that are offered. Each department has an overview and a comprehensive list of all courses that are offered.

After selecting an Academic Unit, the name will appear in red text.
This screenshot shows the departments and programs that are listed under the Academic Unit, Medicine (M.D. & Graduate Degrees), or the School of Medicine. The red text indicates the level that is being viewed.
Department pages
Each department page has two tabs: **Overview** and **Courses**. The **Overview** is an opportunity for the department to list information about their mission, faculty, research efforts, accreditation, achievements, etc. The **Courses** tab is fed from CIM Courses and includes a comprehensive listing of courses associated with that department. Links to external sites can be included on the **Overview** tab only.

The red text shows the breadcrumb to the page that is being displayed. Below the department are the individual pages for each of the programs that are offered in that department. In the example below, there is a Master of Science in Cancer Biology as well as the Doctor of Philosophy in Cancer Biology.

![Department of Cancer Biology Overview](image)

This screenshot shows the Overview tab of the Cancer Biology department.
Editing department page content

Typically a department’s admin and/or graduate director has permission to edit the department page. Following are the steps to edit the **Overview** tab of a page.

1. At the top left corner of the department page, select **Edit Page** (the tan button with the red circle).

2. Two tan bars show up on the screen. The one at the top is a toolbar with buttons to assist with editing the pages. The one at the bottom includes information about the workflow for that page.

3. To edit the **Overview** tab, select **Page Body** on the top toolbar.

4. This opens a window titled **Page Body**. There are editing and formatting options (similar to those found in Word) available in this window. Any changes will be tracked in red for text removed and green for text that is added.
5. When finished editing, select **OK** at the bottom of the window. This returns the user to the page.

**NOTE:** The courses page cannot be edited as the tab is fed by CIM Courses. Any changes to courses must be made through the CIM Courses portal and go through the CIM approval workflow. After changes are approved, the changes will be reflected on the Courses tab of the respective Catalog page.

**Editing the Contact Info box**

1. At the top left corner of the department page, select **Edit Page** (the tan button with the red circle).

2. Two tan bars show up on the screen. The one at the top is a toolbar with buttons to assist with editing the pages. The one at the bottom includes information about the workflow for that page.
3. Select **Address Contact** on the top toolbar.
4. This opens a window titled **Address Contact**.

![Address Contact window](image)

5. Select **Dept** from the box at the top left of the window.
6. This will populate the fields with the department information that is already there. If any editing is done, select OK.

7. If there are additional individuals’ names listed in the Contact Info section, these can be edited using the same process but starting with Individual Contact on the top toolbar.
   a. This opens a window titled Individual Contact, which can be edited.
   b. New individuals can be added by selecting New Item. The Move Up and Move Down buttons near the top of the window enable the user to change the order of the individual contacts that are being displayed.

Viewing the workflow of a Catalog page
To view the workflow for a specific page, the steps are similar to those for editing the page.

1. At the top left corner of the department page, select Edit Page (the tan button with the red circle).

2. Two tan bars show up on the screen. The one at the top is a toolbar with buttons to assist with editing the pages. The one at the bottom includes information about the workflow for that page.
3. Select the **Workflow** hyperlink on the bottom bar. It is under **Page Owner(s)**. The hyperlink is in navy font, so it initially does not look like a hyperlink.

4. A new window titled **Preview Workflow** opens and lists those associated with each role in the workflow. The lines in bold are the role with the members for each role listed below.

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**Program pages**

Each program has its individual Catalog page and typically that page has five tabs:

1. **Overview**. Departments have an opportunity to explain their program including information, such as program background, research initiatives, faculty, etc.
2. **Admissions**. These are the admissions requirements that are specific to the program.
3. **Degree Requirements.** These are the specific courses and other required components of the program.

   **NOTE:** Changes to content on this tab must go through CIM Program and its related workflow.

4. **Plan of Study.** This page contains a general or typical plan of study for the program.

5. **Technical Standards.** The core content is provided by the University’s Office for Academic Accommodations and is standardized across all programs.

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This screenshot shows the Overview tab of the Cancer Biology department along with the other five tabs.

**Overview tab**

The **Overview** tab is an opportunity for the program to showcase its unique qualities and features. It could be used as a marketing tool for student recruitment. On this tab, it is also acceptable to link to the department’s website and/or accreditation or professional organizations.

**Admissions tab**

When reviewing each program page, the Office of Graduate Studies ensures that the minimum requirements for admissions are included. Departments can of course be stricter with their admissions requirements. The Basic Science departments have standardized Admissions requirements, and any changes must be vetted through the IGPBS oversight committee.

**Degree Requirements tab**

This tab is populated by whatever is in CIM Program, so no editing for this tab is done through the Academic Catalog. Please allow enough time to make changes to degree requirements as they do go through Graduate Council.
Plan of Study tab
This tab includes a typical plan of study for that program, which is helpful for advising and reference purposes. By building a plan of study, a student can view the course load each semester, the usual amount of time to completion, and the course descriptions. Selecting a course from the plan of study creates a small pop-up that includes the course prefix and number, course name, credit hours, a description, and the classification (lecture, thesis, etc.). An example of the pop-up window is shown below.

![Typical Plan of Study](image)

The expectation is just to have one “typical” plan of study on here as a visual aid for students and their mentors/advisors. However, there are ways to note and demonstrate variances in a plan of study. As one option, the user could create two separate charts for Track A/B of the plan of study, explaining the differences of each. Alternatively, the user can use a footnote system within the charts and write out the legend below the charts.

Technical Standards tab
The bulk of this tab’s content is standardized and provided by the University’s Office for Academic Accommodations. If there are program-specific restrictions that need to be included, those can be noted in this tab, but it is advised to consult with the Office of Academic Accommodations before making any amendments.
Editing program page content

Typically, a department’s admin and/or graduate director has permission to edit the program page. Following are the steps to edit the Overview tab of a page. The same steps can be followed for each tab.

1. At the top left corner of the department page, select **Edit Page** (the tan button with the red circle).

2. Two tan bars show up on the screen. The one at the top is a toolbar with buttons to assist with editing the pages. The one at the bottom includes information about the workflow for that page.

3. To edit the **Overview** tab, select **Page Body** on the top toolbar.

4. This opens a window titled **Page Body**. There are editing and formatting options (similar to those found in Word) available in this window. Any changes will be tracked in red for text removed and green for text that is added.
5. When finished editing, select **OK** at the bottom of the window. This returns the user to the page.

These steps can be repeated for each of the tabs. To navigate to the next tab, select the title with the pencil next to it from the top toolbar. This will be toward the right of the page. An example for the **Admissions** tab is shown below.

The blue arrows enable navigation to all of the other options that are available on the toolbar. As the screenshot above shows, the blue arrows are needed to navigate to the page body for the **Plan of Study** and **Technical Standards** tab.
Approval Portal

Catalog approval can be found through the following portal:

https://next.catalog.ku.edu/courseleaf/approve/

1. When a proposal is ready for a user’s review, the user will receive an email notification. The email will contain a link directing the user to the specific course or program that needs to be reviewed. Below is an example email:

Valerie:

The catalog has pending changes for your review, please visit:
https://next.catalog.ku.edu/courseleaf/approve/?role=KUMC%20Registrar
to review pages and provide your feedback. Doctor of Philosophy in Therapeutic Science

If a program is currently in CIM workflow, to see the requested changes, please visit the degree requirements page for this program at next.catalog.ku.edu

If you have questions or need information regarding this email, please reply to this email (catalogeditor@ku.edu) or contact your school level editor at the contact information below:

CLAS: Rachel Schwien rschwien@ku.edu
Architecture & Design: Barb Seba bseba@ku.edu
Business: Tammy Barta tbtarta@ku.edu
Education Undergraduate: Tiffany Edmonds tedmonds@ku.edu Education Graduate: Kim Huggett khuggett@ku.edu Engineering Undergraduate: Dawn Shew dshew@ku.edu Engineering Graduate: Anna Paradis aparadis@ku.edu Health Professions: Terry Erisman terisman@kumc.edu School of Law: Vicki Palmer vpalmer@ku.edu School of Medicine: Carrie Scala cscala@kumc.edu School of Nursing: Katharine Agnew kagnew@kumc.edu

Thank you.

-- CourseLeaf

2. Select the hyperlink under the first Please visit to go to the Approval portal.
   a. The page will look like this after logging in:
3. Toward the top of the page, there is a drop-down menu titled **Your Role** with your user name displaying in the box. Click the drop-down menu to select the appropriate Catalog role.

4. After selecting the correct role, all of the Catalog pages awaiting approval will appear.

5. Each page can be selected for review. The one that is selected is highlighted in blue.

6. Each selection will display the original text with red strikethrough and/or green text. The red strikethrough shows things that were removed. The green text shows things that were added.
   a. If it is a new course or program, there are no color changes.

7. For each page, there are three options. These are the three buttons on the far right side of the screen. **Approve** should only be selected after the page is reviewed; it is the user’s way of saying this is ready to move on.
   a. **Edit.** Make changes to the page.
   b. **Rollback.** Move the page to a previous role in the workflow. You will have to write a brief note about why you are rolling it back.
   c. **Approve.** Approve the page for the next reviewer in the workflow.
Other

Workflows
Workflows are fairly standard across departments. They involve one to two levels of approval within a department before returning to the Office of Graduate Studies. Very rarely are the department Chairs included in the workflow because the bulk of the content that is used in the Academic Catalog has been vetted by the Chair through CIM approval processes. Finally, the office of Graduate Studies sends the approved pages to the Office of the Registrar.

The Office of Graduate Studies begins the Catalog review cycle by selecting Start Workflow. Graduate Directors and/or administrators are usually the first step after Graduate Studies begins the workflow. The user(s) associated with the first role will receive an email prompting them to review the page. This can be done through the Academic Catalog portal or Approve pages. Because at least one person associated with each role/level must approve the page, the administrator coordinating these efforts may have to send reminders within their department to prompt action.

When the department is done with their approvals, the pages have two steps in the Office of Graduate Studies. The first, **KUMC Graduate Studies Editor**, is completed by Marcia Jones and/or Val Abbott. The second, **KUMC Graduate Studies Approver**, is completed by Dean Werle.

The pages then go to the KUMC Registrar for final review before ending the workflow with the Catalog Editor on the Lawrence campus.

**NOTE:** It is also important to remember that the updates to the Degree Requirements tab happens ONLY in CIM Program. The CIM workflow is different than the Catalog workflow because the CIM workflow includes more layers, including the Chair and school-level approvals. Adherence to timelines requires careful planning by departments for approval for degree requirements.

Printing course or program content
When on an individual catalog page, all of the page content can be downloaded as a PDF.

1. From the top toolbar, select **View as PDF**. This is toward the right side of the screen.

2. A pop-up window open with a comprehensive PDF that includes the content from each of the tabs. The tabs titles become section headers in the PDF document.
This is a helpful way to print all of the content if individuals would prefer to edit on paper and then transfer the edits to the Catalog system.