COURSELEAF 10 – DASHBOARD

The CourseLeaf Dashboard is a new hub to help facilitate a centralized, more personalized user experience.

Dashboard features include:

- Powerful narrowing, sorting, and filtering options for end users (page owners, schedulers, proposal initiators, and approvers) to quickly find what they need.

- A thermometer to sort items by status

- Simpler approval interface

The below view represents what an end user would see on the Dashboard.

When clicking on the person icon, it will display the name of the user as well as the role(s) of which that person is a member.

The **person icon** in the upper right corner provides the following information:

Logged in as – This displays the user's ID.

Current Roles – Any role the person holds or manages will appear in this area.

COURSELEAF MODULE CARDS

Under the top navigation there are cards displaying the CourseLeaf modules based on what is installed on the editing site (NEXT).
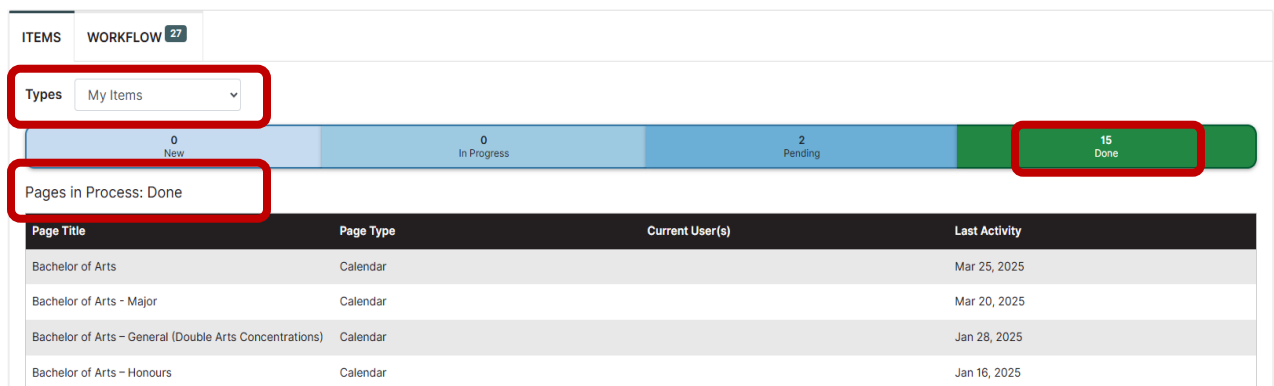
ITEMS TAB

On the Dashboard **Items** tab, adjacent to the Workflow tab, sits below the Module Cards on the Dashboard. Both tabs display Module information customized for the logged-in user.

By default, the **Items** tab shows **My Items** in the **Types** field and represents everything the user initiated. The **Snapshot** (thermometer) indicates the number of items in different status categories by color. The status categories are defined as follows:

- **New** or **Not Yet Started** – Items (such as calendar pages, courses, or programs) that have been newly created but not submitted to workflow
- **In Progress** or **Modified** – Items that have been edited but not submitted to workflow
- **Pending**, **Workflow Started**, or **In Workflow** – Items that are currently in workflow
- **Done** – Items that completed all the workflow steps and are fully approved.

The table defaults to list all the items in **Done** status.

If the user clicks on a different status, such as **Pending** in the screenshot below, the table will display only those items the user initiated that match the thermometer category.
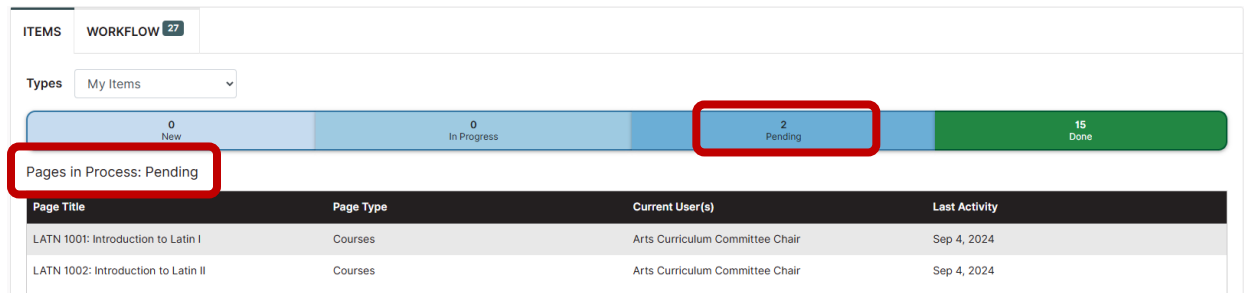
WORKFLOW TAB

The **Workflow** tab sits to the right of the Items tab. If a person has items in workflow there will be a number indicating how many on the tab. Because **My roles** is selected under the **Role** dropdown, the **Filters Applied** immediately under shows the list of all the role names of the logged-in individual.

Page Title	Type	Term	Submitter	Approver	Submitted	Modified
FREN 3500: Indigenous Lit. in French	Courses	2025-2026		Arts Curriculum Committ...	Oct 2, 2024	Oct 3, 2024
PHIL 1000: University Education	Courses	2026-2027		Arts Curriculum Committ...	Feb 14, 2025	Mar 21, 2025
ENGL 2460: Indigenous Media/Literature	Courses	2025-2026		Arts Curriculum Committ...	Oct 2, 2024	Oct 2, 2024
SPAN 2000: Latin American Studies II	Courses	2026-2027		Arts Curriculum Committ...	Feb 25, 2025	Feb 25, 2025
CRIM 4600: Honours Thesis Research Prep	Courses	2026-2027		Arts Curriculum Committ...	Mar 7, 2025	Mar 10, 2025

Columns in the table right below the Filter are defined as follows:

- **Page Title:** Title of the item in workflow
- **Type**: Module the item in workflow is from
- **Term:** Calendar the item in workflow is from
- **Submitter:** Initiator of the changes that are in workflow
- **Approver:** Role or user who needs needs to act on the item
- **Date Submitted:** Date the item began its approval path
- **Modified:** Date the item was last updated or approved

An end user can also view queues of other roles they don't have. In the below example, the user does not hold the role selected, *Science Faculty Executive*, but it will display in the **Filters Applied** area.

If a person doesn't want to see a role represented, they can click on the "X" next to that role. The resulting list of workflow items will update to remove items for that role.

When clicking a line item in the **Workflow** tab a pop-up window displays.

This **Approval** screen shows a gray header across the top that includes action items after review.

From left to right, the band has the following:

- **Print -** The printer icon will display a preview window to print the page. The **Filter by:** dropdown in the middle applies to the printed document. Therefore choosing *All Changes* will print red/green markup, and choosing *Hide Changes* will show only the proposed final version.

- **Page Information -** The small "i" icon displays the following about an item:
  - **Title** - This would display the following based on module: catalog page (CAT), course or program proposal (CIM), scheduling unit or section (CLSS).
  - **Last Update** - This is the date the item was last updated
  - **Template** - Module the item belongs to
  - **Page Authors** - Item's author(s)

- o **Workflow** - This will display the step in workflow for a CAT pages only.
- o **College** - College the item belongs to
- o **Department** - Department the item belongs to, if applicable

Page Information ✕

- **Title:** PHIL 1000: University Education
- **Last Update:** Mar 21, 2025, 2:37 PM
- **Template:** cim
- **Page Authors:** any
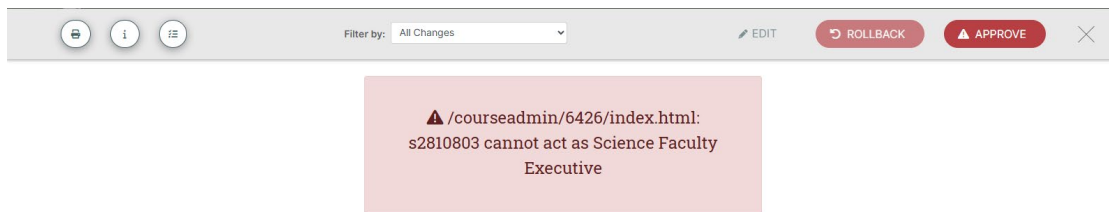- **Workflow:**
- **College:** AR
- **Department:** Philosophy
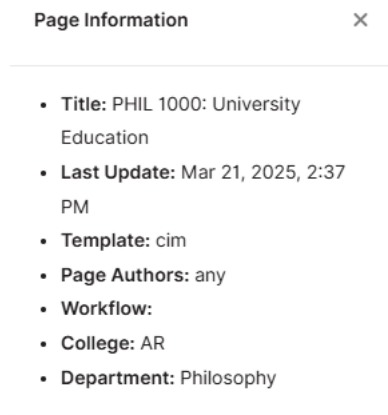
- **Workflow** – This icon, allows a reviewer to see the steps in the workflow that are completed and pending.

- **Filter By:** – Allows a reviewer to view who made what changes to an item. Selecting *Hide Changes* removes the red/green markup from view on the page. *All Changes* allow for the approver to view all of the red and green markup from all users.

- **Edit** – Allows review of the item in workflow. For CIM proposals, the proposal opens in a new window, and for Calendar pages, the Edit Toolbar appears.

- **Approve** – Clicking Approve allows the item being reviewed to move to the next step in workflow and be removed from the logged-in user's Workflow queue.
  - o If a user is not authorized to review an item and clicks **Approve**, it will generate a pop-up box saying that that person cannot act in that role.

smu-ca-update-cl10.dev9.leepfrog.com says

/courseadmin/6426/index.html: s2810803 cannot act as Science Faculty Executive

OK

When clicking OK to acknowledge the pop-up, the Approval Screen will show a similar message.

⚠ /courseadmin/6426/index.html:
s2810803 cannot act as Science Faculty
Executive

- **Rollback** – Rollback to send it back to any step in the workflow, with a comment/reason.

- **Comment/Reason** – The text box used to add in Comments/Reasons to save to the workflow. This field is required when using the Rollback option.

- **Close "X"** – Closes the Approval Screen and returns the user to the CourseLeaf