

Accessing Lumen to Edit Proposals

Please follow the instructions below in order to **edit/approve/rollback a course or program proposal as a Workflow step approver** in Lumen. This editing window has “CourseLeaf” at the top of the page.

See KB for more information: <https://kb.wisc.edu/lumen/78922>

1. After a course or program proposal has been submitted to workflow, you should receive an email notification from Lumen. You can use the link provided to enter the Lumen CourseLeaf window or you can use this link: <https://next-guide.wisc.edu/courseleaf/approve/>

2. The link above will take you to the Lumen CourseLeaf site. **Bookmark this location for future access.**

3. See the Lumen CourseLeaf window below:

Select your approver role here.

The screenshot displays the Lumen CourseLeaf interface. At the top left is the COURSELEAF logo. The main header area includes 'Pages Pending Approval', 'Filter List', 'Refresh List', and a 'Your Role:' dropdown menu. A black arrow points to this dropdown menu. Below the header is a table with columns 'PAGE' and 'USER'. The 'PAGE' column contains 'Loading...' and the text 'Select a proposal to edit from this box.' To the right of the table is a 'Page Info' sidebar with tabs for 'Page Info', 'Workflow Status', 'Attached Files', and 'Revision History'. The 'Page Info' tab is active, showing fields for Title, Last Update, Template, Page Authors, Workflow, College, and Department. At the bottom of the page is a blue 'PAGE REVIEW' bar with buttons for 'Hide Changes', 'View Changes By: All Changes', 'Edit', 'Rollback', and 'Approve'.

The proposal will load here.

Select your approver role (see black arrow.) Please note that users with multiple approver permissions will need to select the correct role in order to see courses in their queue.

Select the proposal you wish to edit in the Page/User window. Once selected, the bottom portion of the page (Page Review) will contain the proposal.

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3. Possible actions include:

Select the blue “**Edit**” button to make edits.

Select the red “**Rollback**” button to roll the course back to the most recent workflow step.

Select the green “**Approve**” button to approve the course and send it forward in Workflow to the next approval step.



Edit button will pull up an additional window where you can make edits to the proposal.

EX: Course Proposal



Course Inventory

Editing: **COURSE NUMBER: COURSE TITLE**

[Click here before filling out this form.](#)

Proposal contact information:

This can be changed if someone else should be contacted with questions about the content of this proposal. The person who clicks the Start Workflow button is the proposer of the course and will receive workflow notifications regardless of who is listed here.

Name E-mail Phone

Type of approval

Course ID 001731

Basic Catalog Information

[Open help page with question by question information.](#)

The blue button next to each question links to the help information for that specific question.

First Available

Term ⓘ

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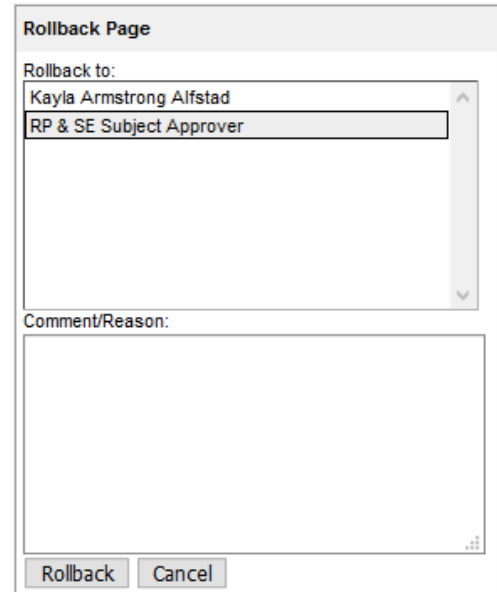
Rollback button will send the proposal back to a previous step in Workflow.

Please note that sending the proposal back to the initiator removes the proposal from Workflow. It must be edited in the Lumen Proposal System and sent back into Workflow.

The name of the proposal initiator will be displayed in the top box.

You can make rollback comments in the bottom box.

Press “rollback” to send the comment and the proposal back to the initiator or the department approver.



The screenshot shows a dialog box titled "Rollback Page". It contains a "Rollback to:" section with a list of names: "Kayla Armstrong Alfstad" and "RP & SE Subject Approver". Below this is a large text area labeled "Comment/Reason:". At the bottom of the dialog are two buttons: "Rollback" and "Cancel".

Approval button moves the proposal forward to the next step in Workflow. After approving the proposal, it will “disappear” from the window in CourseLeaf.

4. Additionally, you can make a comment to a proposal by clicking the green “Add Comment” button located on the top right corner of the proposal.



Comments will be visible to all Workflow approvers at the bottom of the proposal page.

Reviewer
Comments