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## CourseLeaf Help

Welcome to CourseLeaf Help. Please use the navigation or search field to help you find tutorials, step by step instructions for using CourseLeaf tools, and tips and tricks for efficiently managing your CourseLeaf software.

This site is dedicated to providing tutorials, tips, and answers to common questions about CourseLeaf and will continue to be updated and improved as more content is produced.

### Help Site Updates

- CourseLeaf CAT Release Notes

# CourseLeaf

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- Browsers (p. 4)
- CourseLeaf Console
- Data Flow
- DBLeaf
- Migrate Programs from CAT to CIM (p. 46)
- Placing CIM Programs in CAT (p. 47)
- Reporting
- Showing Differences (Red/Green Markup) (p. 5)
- Web Site Accessibility (p. 5)

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## Overview

Use the links above to learn about some of the features and benefits of CourseLeaf products.

## Browsers

### Overview

An internet browser is the piece of software that displays and allows for edits of all CourseLeaf products. CourseLeaf supports:

- Internet Explorer (<http://windows.microsoft.com/en-us/internet-explorer/download-ie>) (9, 10, and 11). Internet Explorer must not be in compatibility mode.
- Microsoft Edge (<https://www.microsoft.com/en-us/windows/microsoft-edge>)
- Mozilla Firefox (<https://www.mozilla.org/en-US/firefox/new>) (versions 10+)
- Google Chrome (<http://www.google.com/chrome>) (versions 20+)
- Apple Safari (<https://www.apple.com/safari>) (versions 5+)

Uploading files requires Adobe Flash Player version 9+, and CourseLeaf does not use Java or any other 3rd party plugins.

## Troubleshooting Browser Issues

If you experience an issue with CourseLeaf, it may be an issue with the browser. Before contacting CourseLeaf support, please take the following troubleshooting steps.

1. Ensure you are using a supported browser (see list above). To find your current browser version, look for the menu item in the browser toolbar that says "About ...". In all current browsers the menu items appear on the far upper-right corner.
2. If you are using a supported browser, try using the CourseLeaf feature in another supported browser.
3. Check the Known Browser Issues of this documentation to see if this issue is already known and a work-around is stated.
4. If the feature works in the other supported browser, try completely uninstalling the malfunctioning browser then reinstalling and trying the feature again.
5. If the problem persists after reinstalling contact your on-campus CourseLeaf contact who will contact CourseLeaf support. Please note the time and date of the issue, the browser used and the exact url of the page with the problem.

## Known Browser Issues

### Chrome

#### Anchors

Anchors may be set with the anchor tool, but a link to that anchor is not available.

Workarounds:

- use another supported browser.
- create a link manually in the "Source" tool. The link should be set in the source tool as follows: `<a href="#the-name-of-the-anchor">The Link phrase</a>`

## Make Link a Parent

An error is shown on clicking Apply

"Error -- please alert Leepfrog support at clhelp@leepfrog.com: TypeError: undefined is not a function"

when the "Make this link a parent" check box is selected.

Workarounds:

- use another supported browser.

## Web Site Accessibility

### Overview

Web accessibility is an inclusive practice designed to ensure that all users can access and interact with web sites. When web sites are correctly designed and edited, all users can have equal access. Below you will find some best practices for ensuring that your CourseLeaf catalog site is managed with accessibility in mind.

### Considerations

1. Use the numbered and bullet list tools (p. 11) in the Page Body Editor.
  - This allows users with screen readers to identify an ordered list from plain text.
2. Use the Format Options (p. 11) to appropriately nest your headings.
  - If Heading 1 corresponds to the title on your page, start headings in your Page Body Editor with Heading 2
  - Sub headings of Heading 2 should be Heading 3 etc.
3. If you use images in your catalog, be sure to include image text.

## Showing Differences (Red/Green Markup)

### Overview

Showing Differences, or Red/Green Markup, is available throughout CourseLeaf to show the differences between the last approved content and the current edited content, red for deleted text, green for new text. A blue bar also indicates a change in a table that cannot be displayed with red/green mark-up. It is also used in some specific situations to show the differences between the SIS and the data in CourseLeaf.

Junior Year		
Fall		
<del>CHEM 470</del>	<del>Thermodynamics &amp; Kinetics</del>	<del>3</del>
<u>CHEM 454</u>	Inorganic Chemistry II	3
<u>CHEM 454L</u>	Inorganic Chemistry II Laboratory	1
<u>CHEM 466</u>	Fundamentals of Physical and Biophysical Chemistry	4
<u>CHEM 443</u>	Instrumental Analysis III - Chromatography/Mass Spectrometry <sup>3</sup>	2

## All Changes

When viewing All Changes in the approval screen or when viewing the Show Differences tool in CourseLeaf CAT, the differences being shown are from the last approved content and the current edits. With this in mind, there are some things to consider:

1. If your catalog completes multiple workflows for one catalog edition the red/green mark-up will only show the differences from the last approval and the current edits, not all changes from the last catalog.
2. The red/green mark-up does not show all of the individual changes that may have taken place in the midst of the approval process. That is if one person deleted a word and the next person added the same word back, it will not appear as a deletion and an addition, it will just appear as normal text. Nothing actually changed from last approved content and the current edits.

## **View Changes Per Editor**

In the approval screen the View Changes by drop down menu lists all editors in the order in which they edited the content. and select an editor whose changes you wish to review. The changes seen here are changes the selected author made compared to the document they received from the previous editor.

*Note: some changes can be made in the catalog that are not readily visible, such as a change to keywords or page description. It may appear that the editor made no changes when in reality they did make a change, just not one that can be seen.*

# CourseLeaf Catalog (CAT)

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- Administrators
  - A-Z Index
  - Annual Checklist
  - Catalog Console
  - CourseLeaf API
  - Edit Navigation
  - Error Messages
  - Filters
  - Manage Tabs
  - Owners and Workflow
  - Publishing
  - Site Map
  - SiteSearch
- Borrowed Content (p. 8)
- Inline Course (p. 9)
- Page Body Editor
  - Cut, Copy, Paste, Delete (p. 9)
  - Edit HTML Source (p. 10)
  - Find, Replace, Reveal (p. 10)
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  - Faculty List (p. 32)
  - Graphic (p. 33)
  - Set Up (p. 34)
  - Show Differences (p. 36)
  - View as PDF (p. 36)

## Borrowed Content

### Overview

Borrowed Content is content which is edited on one catalog page and displayed on another catalog page. Both pages with the borrowed content are published and visible in your live catalog as opposed to shared content pages in your /shared/ directory which do not get published. For more information about shared content, see Shared Content.

Borrowed Content can be displayed either in a new tab, which is created through Manage Tabs , or in an existing tab on the page.

**NOTE: Turning on borrowed content will result in slower republishing times.**

### How to Insert Borrowed Content

1. Open the page body editor on the page that needs the borrowed content
2. Place cursor in the page body where the Borrowed Content should appear
3. Click Insert/Edit Formatted Table
4. Select Borrowed Content
5. Click OK
6. Select the Page Path or Title drop down, and begin entering part of the path (e.g., /undergraduate/programs) or title of the page from which to borrow
7. Choose the page from which to borrow in the drop down results
8. Click OK
9. Select the tab to appear in the Tabs in selected Page drop down.
  - The items in this drop down will correspond with the Tab ID on the target page.
10. Click OK

### How to Update Borrowed Content

#### Option 1

To refresh an individual page using borrowed content with the latest edits from the target page, do the following:

1. Navigate to the page with borrowed content
2. Click Edit to open the tool bar
3. Click the Set Up tool
4. Click OK

**Note:** this will rebuild the page, however a page that has a status of Done or Not Yet Started will be put into Editing and the Start Workflow button will turn green (if it wasn't already).

#### Option 2

To refresh an individual page using Rebuild Subdirectory on the console, do the following:

1. Navigate to the CourseLeaf Console
2. Click the Republish Subdirectory tool
3. Republish the subdirectory of the target page

**Note:** When published, the page borrowing content will display the last approved content of the target page.

#### Option 3

To refresh all borrowed content in your catalog, do the following:

1. Navigate to the CourseLeaf Console
2. Click the Republish Site tool

**Note:** Republishing your site could take a few minutes. Always use caution when republishing site while your Next Catalog Site is updating your Live Site. Please see Republish Site for more information.

### How to Remove Borrowed Content

1. Open the page body editor on the page that needs the borrowed content



2. Click the piece of borrowed content to select it
3. Press delete on your keyboard
4. Click OK

## Inline Course

### Overview

Inline Course is a tool used to link a course listed within a body of text in your page body editor back to the course database. This is done to create a Course Bubble with additional information about the course on your catalog page.

### How to Insert an Inline Course

1. Click Edit Page
2. Click Page Body or the pencil icon corresponding to the tab on which you want to insert the inline course
3. Type in a course code
4. Highlight the course code
5. Click Insert/Edit Database Field or press Ctrl+D (as a shortcut) to link the course code back to the source

**Note:** If the course code does not link back to the source, a red box will appear around the course. Check to make sure the correct course code has been entered which may be case and/or spacing sensitive.

### How to Insert an Inline Course with the Course Picker

1. Click Edit Page
2. Click Page Body or the pencil icon corresponding to the tab on which you want to insert the inline course
3. Click in the page body where the course should display
4. Click Insert/Edit Database Field
5. Choose a College and/or Department, then click a course from the Course Picker
6. Choose a format
7. Click OK

### How to Edit an Inline Course

1. Click Edit Page
2. Click Page Body or the pencil icon corresponding to the tab on which you want to insert the inline course
3. Double-click the blue box around the course
4. Choose a new format or a different course
5. Click OK

## Page Body Editor

### Cut, Copy, Paste, Delete

#### Page Body Editor Buttons and Keyboard Shortcuts

- Copy selected text (Ctrl+C)
- Cut selected text to paste elsewhere (Ctrl+X)
- Paste copied or cut text (Ctrl+V)
- Paste as plain text, removing original formatting
- Paste from Microsoft Word
- Delete selected text

### How to Copy and Paste Text

A user can easily move text into the Page Body from another document, such as Microsoft Word or WordPerfect.

1. Open the toolbar
2. Open the page body editor for the page you want to work on

3. In the source that you want to copy from, select the content to copy
4. Right click and select Copy or use (Ctrl+C) on your keyboard
5. Place your cursor in the Page Body Editor where you would like to paste your text
6. Right click and select Paste or use (Ctrl+V) on your keyboard
7. Click OK to save your changes

**Note:** Tables may not be copied and pasted from any source. Tables must be created with the Table Editor (p. 18). This is because the mobile version of the catalog and the PDF that is created require strict control on table forms.

## Helpful Tips:

Blue boxes that surrounds any specified content may be copied and pasted into another page body editor. Click on the box, and copy (Ctrl+C), then navigate to the page to paste to and open the page body editor, then paste the blue box.

## Edit HTML Source

### How to Edit Source Code

For users who are familiar with HTML, CourseLeaf provides a source tool to format the web site text via HTML.

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Source button in the toolbar
4. The text screen will display HTML tags. Edit content as desired
5. Return to the original interface by clicking the Source button again
6. Click OK to save your changes

## Find, Replace, Reveal

### Page Body Editor Buttons and Keyboard Shortcuts

- Find / Replace a phrase (Ctrl+F)
- Show Blocks
- Select All (Ctrl+A)

### How to Find Text

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Find/Replace button
4. Type the desired word to search for into the **Find What** field
5. Select the appropriate Find Options:
  - Match case will only find words that have the same capitalization as the Find What field
  - Match whole word will only find complete words rather than parts of a word
  - Match cyclic will start the search from the position of the cursor, then return to the top of the page and search down the page again
6. Click Find

### How to Replace Text

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Find/Replace button
4. Select the Replace tab
5. Type the desired word to replace into the **Find What** field
6. Type the replacement word into the **Replace** field
7. Select the appropriate Find Options
  - Match case will only find words that have the same capitalization as the Find What field
  - Match whole word will only find complete words rather than parts of a word

- Match cyclic will start the search from the position of the cursor, then return to the top of the page and search down the page again
8. Click Replace to replace each instance of the word individually, or click Replace All for the system to automatically replace every instance of the found word on the page

Note: The Find and Replace function will find items in blue boxes but will not replace those items. Items in blue boxes must be replaced manually.

## How to Show Block / Reveal Formatting

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Show Blocks button to reveal the formatting tags being applied to the page text

Revealed formatting is identified by its HTML tag:

- P - Paragraph
- H1, H2, etc. - Heading levels, with H1 being the highest heading level, H2 being the next highest heading level, and so on
- Div - Generic text container

## How to Select All

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Select All button (Ctrl+a) to highlight everything inside the Page Body

## Format Text

### Page Body Editor Buttons and Keyboard Shortcuts

Highlight the text that is to be formatted and click the desired formatting button. Click the button again to undo formatting.

- Bold (Ctrl+B)
- Subscript text
- Underline (Ctrl+U)
- Superscript text
- Italicize (Ctrl+I)
- Align left (Ctrl+L)
- Align right (Ctrl+R)
- Center (Ctrl+E)
- Justify
- Numbered list
- Bulleted list
- Block quote
- Increase Indent
- Decrease Indent
- Define text format - Header, paragraph, etc.
- Define text style

## Format

You will notice that the page body editor does not come with a font or font size selector. This is because your font and font size have been pre-determined by your institution's style guide. You can use the Format drop down to select from your institution's pre-defined headings and font styles.

## Accessibility Considerations

Leapfrog recommends using the format tool to nest your headings appropriately. This means starting your page with either a heading 1 or heading 2. Heading 1 often corresponds to the title of your web page. If this is the case, you will want to start your page body headings with heading 2. Sub-headings of heading 2 should be heading 3 and so on. Nesting your headings appropriately ensures that users accessing your catalog with a screen reader can easily understand the format and layout of content on the page. It also makes your PDF visually easy to follow.

## How to Add Headings

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Place your cursor on the text that you want to format
4. Click the Format drop down menu
5. Click the format that you want
6. Click OK to save your changes

## Helpful Tips for using Headings

Headings should be properly *nested*. That is, every page should follow a logical structure of headings, and not jump around. I.e., Heading 3's should be under a Heading 2, Heading 4's under Heading 3, and so on. Headings that are not nested in this way will not meet most ADA compliance standards. CourseLeaf does not require that this nesting take place, but it is best practice. Further, since the title of a page is Heading 1, there should never be another Heading 1 used in a page body.

## Bulleted Lists

It is important to use the Numbered list or Bulleted list button when creating lists rather than typing numbers or adding bullet characters manually. This will preserve formatting that is consistent across the entire site and the various platforms and browsers used by viewers. When copying from a word processing document, ensure that lists are pasted in this fashion. They will likely need to be manually styled after copy/pasting into the Page Body editing environment.

If a list item should include more than one paragraph, consider using a line break at the end of a paragraph rather than a return. A line break is entered by holding shift while pressing enter on the keyboard.

Lists may have nested lists as well. For instance, in an outline, the first level may have sub-levels. In CourseLeaf the first item in a list or sublist may not be indented, but subsequent items may be indented to make sublists.

## How to Create a Bulleted List

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Type the text for a list item, then click the Numbered list tool
4. Press return to move to the next item in the list
5. Type the text for the sublist item.
  - The text will be on the same level as the first item. Click the Increase indent tool or press tab on the keyboard to move the item into a sublist.
6. Repeat as necessary. To move an item out to a containing list, use the Decrease indent tool.
7. Click OK to save your changes

## Links

### Overview

When creating links, keep in mind how the link will be displayed in the print (non-web) versions of the catalog. Links such as ...in Biology, click here. should not be used, since you cannot click in the print version of the PDF. Instead, consider rephrasing your link to say something like ...in Biology, refer to Biological Sciences. This will be more clear in the different contexts of the catalog (web, pdf, etc...).

When the PDF is generated, links outside the catalog will appear in parentheses after the linked text. Links in the catalog will display the page number for that link (if the page is included in the PDF) or the web link to that page will appear in parentheses.

### How to Create Links

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text or image that is desired to be turned into a hypertext link
4. Click the Insert/Edit Link button
5. Type the destination web address into the text box labeled **URL**
  - To link to a website or another page outside of the catalog, simply type `http://somepage.com`. *For example: `http://google.com`*
  - For links to pages within the catalog, use the relative url by entering the portion of the URL following `.com` or `.edu`. *For example, to link to this page a user would enter: `/cat/page-body/links`*

6. To open the link in a new window, click the check box next to Open in a New Window
7. Click OK
8. Click OK on the Page Body Editor to save your changes

## How to Link to an Email Address

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text or image that is desired to be turned into a hypertext link
4. Click the Insert/Edit Link button
5. Type mailto: into the text box labeled **URL**
6. Immediately following mailto: type the email address with no spaces. *For example, mailto:jsmith@gmail.com*
7. Click OK
8. Click OK on the Page Body Editor to save your changes

**Note:** Using a mailto: link will open a blank email addressed to the linked address in the user's default mail client when the user clicks the hyperlink

## How Link to an Anchor

An anchor link allows users to jump to a specific part of the webpage by clicking on a link.

**Note:** Anchor links within tabs on another page cannot be a linked.

### Place the anchor:

1. Place the cursor where an anchor should be added and click the Anchor button.
  - You should not highlight text to set the link. Simply click where in front of the text that should have the anchor.
2. Give the anchor a name
  - Try to give it one that relates to the content so users know which anchor to link to when a link is created
  - Do not use spaces
  - Only use \_ and - if you need to use special characters
3. Click OK

This anchor will now be available as a link destination

### Link to the anchor:

1. Type and highlight the desired link text
2. Click the Insert/Edit Link button
3. Click the Insert/Edit Link to an Anchor option, select the desired anchor from the drop down list, and click OK

## How to Upload a Document and Add a Link

It is generally not advised to upload documents to the catalog unless the document will be updated and maintained in the catalog. If the document is already available from another site, you might consider linking to it instead.

If you decide to upload a document, take the following steps:

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text or image that is desired to be turned into a hypertext link
4. Click the Insert/Edit Link button
5. Select Upload A New File and click the Browse button
6. Navigate to the file you wish to upload, select it, and click Open. The file name you selected will appear next to the Browse button.
7. Click OK to upload the file and add it to the page body.

File uploads are page specific. To use the same file in multiple locations consider uploading it on one page, then creating a link to that document. For instance, to link to a page called document.pdf on the /undergraduate page, the link would point to /undergraduate/document.pdf.

## How to Unlink

1. Open the toolbar

2. Open the page body editor for the page you want to work on
3. Highlight the hypertext link to unlink
4. Click the Remove Link button
5. Click OK
6. Click OK on the Page Body Editor to save your changes

## Links in the PDF

Links display in the PDF version of the page differently than the web version in a few significant ways.

1. Text that is linked to an external website will print the URL in parentheses after the text
  - Linked Text (<http://www.externaldomain.com>)
2. Text that is linked to an internal (catalog) page when that linked catalog page appears in the PDF will print the page number of the linked page in parentheses
  - Linked Text (p. xx)
3. Text that is linked to an internal (catalog) page when that linked catalog page does not appear in the PDF will print the URL of the linked page in parentheses
  - Linked Text (<http://livecatalogsite.edu>)
4. An external link in the page body editor will print in the PDF without parentheses only if the URL and the text on the page both start with <http://>.
  - <http://www.externaldomain.com>
  - If the text link in the page body editor does not begin with [http](http://) then it will appear in the PDF as [www.externaldomain.com](http://www.externaldomain.com) (<http://www.externaldomain.com>).

## Helpful Tips

1. Choose a link style to use throughout your catalog, and stick with it
  - Linked Text (<https://google.com>)
  - <http://www.google.com>
2. Remember that your catalog will be archived for future reference.
  - Since websites change over time, consider what you are linking to and if it is worth building inside the catalog so that it can be archived too
  - For example, linking to an external web page about tuition and fees will not be useful when users are clicking the link in your archived catalog and are being directed to the most current information about tuition and fees
3. Be cognizant of the language used around your links
  - Words like click here should not be used, since you cannot click in the print version of the PDF. Instead, consider using words like "refer to" or "please visit"

## Manage Selected Content

### Overview

- Manage Selected Content (Admin only)

Manage Selected Content is a tool in the Page Body Editor that allows you to easily move content from one place in the catalog to another. You can use this tool to create new pages, create new page tabs, move content to existing page tabs, create shared content, or migrate content into CIM Programs.

### How to Open the Page Body Editor

The first step to managing selected content is accessing the page body editor.

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the content you want to manage
4. Click the Manage Selected Content tool
5. From the drop down, choose the content to create

**Note:** *There is no undo for this feature.*

### How to Create a New Page

This choice will move the selected content out of this editor and onto a new catalog page.

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text that should be made into a new page. This may include plain text, headers, blue boxes, or anything else displaying in the page body editor. *Note: If selecting a blue box, the entire blue box will be shared.*
4. Click the Manage Selected Content tool
5. Choose New Page from the Selection Destination Content Type drop down
6. Click OK
7. Enter a title for the new page name in the Name field
8. Enter the URL for your new page. The URL that you choose will indicate the directory that the new page will be created in. For example if I use / undergraduate/biology I will be creating a new Biology page in the Undergraduate section of my catalog. Or /graduate/biology/ba will create a new Biology BA page in the Biology Section of the Graduate Catalog
9. Click OK

You can now navigate to the new page you have created and use the Set Up (p. 34) tool to complete page set up.

## How to Move Content to a New Page Tab

This choice will move the selected content out of this editor and into a new tab on the page.

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text that should be made into a new tab. This may include plain text, headers, blue boxes, or anything else displaying in the page body editor. *Note: If selecting a blue box, the entire blue box will be shared.*
4. Click the Manage Selected Content tool
5. Choose New Page Tab from the Selection Destination Content Type drop down
6. Click OK
7. Enter a title for the new tab in the Name field. Any additional fields should be left blank.
8. Click OK

A *Success* box will appear when the operation is complete. Click OK and then be sure to Click OK on the Page Body Editor to completely save the change.

## How to Move Content to an Existing Page Tab

This choice will move the selected content out of this editor and into an existing tab on the page.

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text that should be moved to an existing tab. This may include plain text, headers, blue boxes, or anything else displaying in the page body editor. *Note: If selecting a blue box, the entire blue box will be shared*
4. Click the Manage Selected Content tool
5. Choose Existing Page Tab from the Selection Destination Content Type drop down
6. Click OK
7. Choose the tab to move the content to. Choose from the drop down whether to append it to the end of the tab or at the beginning of the tab
8. Click OK

A *Success* box will appear when the operation is complete. Click OK and then be sure to Click OK on the Page Body Editor to completely save the change.

## How to Move Content to a New Shared Page

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Highlight the text that should be made into shared content. This may include plain text, headers, blue boxes, or anything else displaying in the page body editor. *Note: If selecting a blue box, the entire blue box will be shared.*
4. Click the Manage Selected Content tool
5. Choose New Shared Page from the drop-down
6. Click OK
7. Enter a name for the new shared page in the Name field.

*Note: The name entered will be that name that displays in the list of shared content when looking to insert it into the page. This will not populate the Title in the Set Up step for the new shared page.*

8. Press the tab key on the keyboard to auto-fill the URL field.

*Note: The URL field will be built off of the path /shared/ plus the Name field. It can be changed, however the URL must always start with /shared/.*

9. The page owner and workflow will be filled with the owner and workflow for the current page. This may be changed at this time or later.

10. Click OK. A Progress note will appear showing the content has been created. The content will now be in a blue box called Other Content.

## How to Move Content to a New CIM Program

Migration of CIM Programs may be accomplished with the Manage Selected Content tool as well. See Migrating Programs from CAT to CIM for more information.

## Remove Formatting

### Page Body Editor Button

- Remove formatting

### How to Remove Formatting

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Select the text that needs to have formatting removed
4. Click the Remove Formatting button
  - This tool does not affect numbered or bullet lists, heading formatting, or indenting

*Note: When copying and pasting from Microsoft Word, only the styled text will be pasted. If text is not styled with Word's style feature or the Bold, Italics, or Underline tool in Word, it will be pasted as plain text.*

## Special Characters & Horizontal Rules

### Page Body Editor Buttons

- Insert a horizontal line
- Add a special character

### How to Add a Special Character

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Place your cursor where you want to add the special character
4. Click the Special Character button.
5. This will open the Special Character window. Select the desired character.
6. Click OK to save your changes

### How to Insert a Horizontal Line

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Place your cursor where you want to insert the line
4. Click the Insert Horizontal Line button
5. Click OK to save your changes

## Undo & Redo

### Page Body Editor Buttons and Keyboard Shortcuts

- Undo last action(s) (Ctrl+Z)
- Redo last action(s) (Ctrl+Y)



## Undo Redo Changes

1. Open the toolbar
2. Open the page body editor for the page you want to work on
3. Click the Undo button (Ctrl+Z)
4. Click the Redo button (Ctrl+Y) to restore the last action
5. Click OK to save your changes

## Shared Content

### Overview

Shared Content is a tool within CourseLeaf used to display the same information on multiple pages while editing in a single location. Shared content on a catalog page goes through workflow independently from the rest of the content on the catalog page. There are two scenarios where shared content may be a helpful tool:

1. If there is a block of information owned by a department, unit, or area that needs to be displayed on several catalog pages. For example, a social justice statement that is owned by the department of social justice and that needs to appear on multiple catalog pages. Or a general education curriculum block that needs to be displayed on multiple pages. Creating shared content for these scenarios means that the social justice statement and general education requirements can be updated in one location and pushed out to all of the pages that need it.
2. If there is one catalog page that has sections of content that need to be maintained by different departments. For example, a page called Student Services with sections on it for Libraries, Human Resources, Admissions, and Technology. Each of these sections needs to be updated by a different department so moving them into shared content will allow for each section to have its own independent workflow while remaining on the page for Student Services.

### Things to Note

1. Creating shared content creates a new page for the content that you are sharing. The content is then shared from the new page to any pages that you choose to share it on. This means that shared content has its own owners and workflow.
2. You can create categories for your shared content to allow end users to easily insert shared content onto their catalog pages and makes finding specific pieces of shared content easier. For more information about Shared Content Categories, please see Shared Content Categories.
3. There is also a tool called Borrowed Content. Borrowed content is not put onto a new page. It is embedded directly from a currently existing page to another. This means that Borrowed Content does not have owners and workflow that are separate from the page that it is embedded from. For more information, please see Borrowed Content (p. 8),

## How to Create Shared Content Using Existing Catalog Content

1. Navigate to the page in the catalog that has the **existing** content to be shared
2. Click Edit Page
3. Open the Page Body editor
4. Highlight the text that is to be shared content
5. Click Manage Selected Content
6. In the drop-down box, select New Shared Page as the content type
7. In the **Name** field, type the desired title of which to represent the page
  - Push Tab on the keyboard to automatically generate a URL in the **URL** field OR In the **URL** field, type in the URL by only putting - /shared and then the name of the page. *For example: /shared/createsharedpages*
8. There is an option of assigning Owners/Workflow at this time, but it is not required
9. Click OK to make changes and to return to the Page Body screen
10. The shared text will appear in a blue box in the Page Body
11. The shared text will appear in a grey box on the page itself, but the grey box is only visible when the CourseLeaf toolbar is open
12. Click OK when finished to save any changes that were made

## How to Edit Shared Content

1. Click Edit Page
  - With the toolbar open, there should be a grey box around the shared content
2. Click the pencil icon next to the Shared Content to edit
3. An editing window will open with the Shared Content to allow changes to be made
4. Click Start Workflow if you are completely finished making edits to your shared content

- You must start workflow on shared content as well as the page on which it is placed
5. Click OK to save your changes and come back at a later date to finish

## How to Edit Shared Content from Shared Directory

1. Navigate to the shared directory
  - i.e.: [nextcatalog.yourschool.edu/shared](http://nextcatalog.yourschool.edu/shared)
2. Click on the link for the shared page you want to edit
3. This shared page may be edited like any other page.
  - Note: the /shared directory is never published. All content in the /shared directory must be inserted on a page to publish.
4. Click OK to save your changes

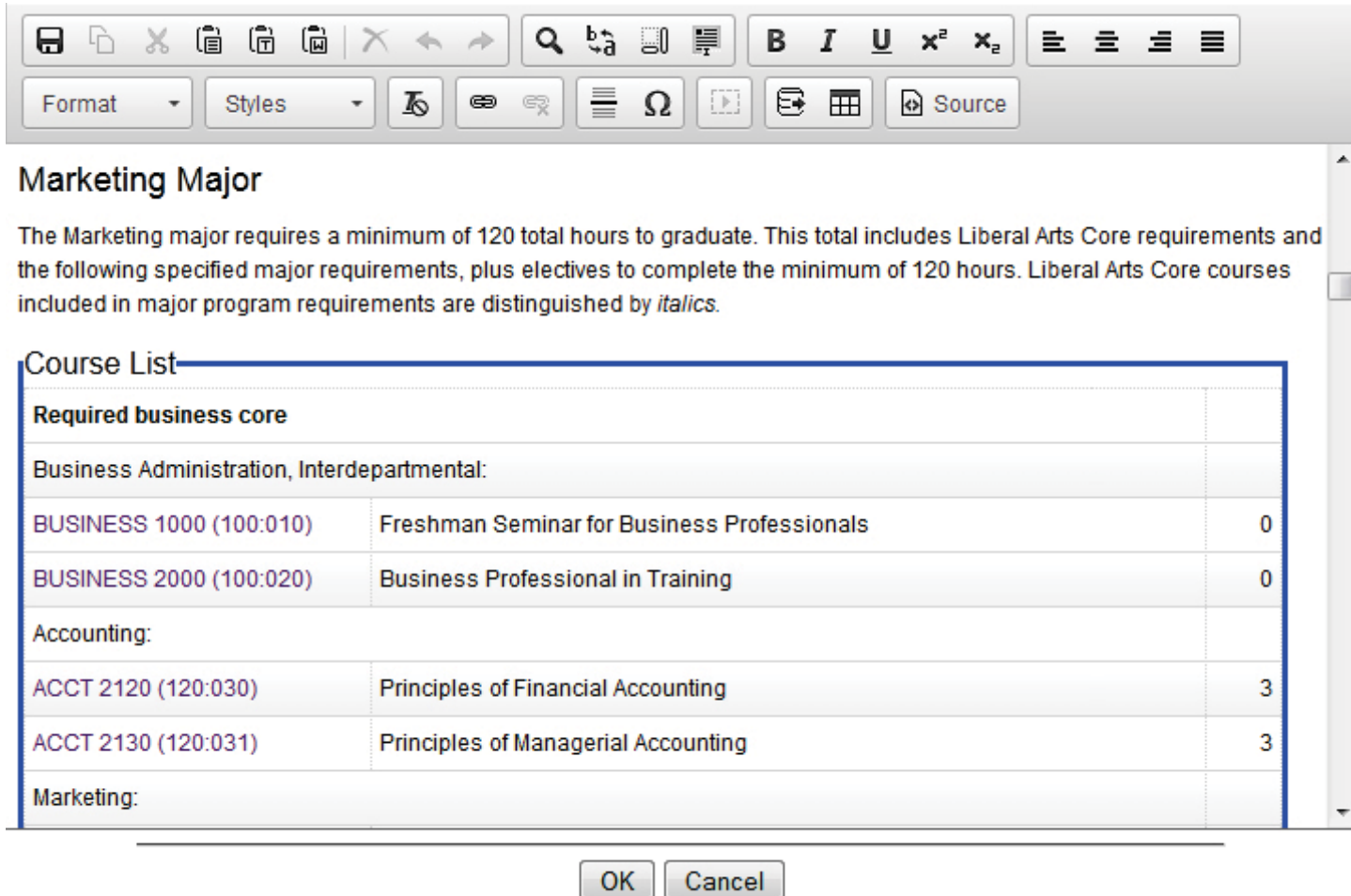
## How to Insert Shared Content

1. Navigate to the page in the catalog desired to insert the shared content
2. Position the cursor where the content should be placed
3. In the CourseLeaf toolbar up above, click on the Edit/Insert Formatted Table button
4. In the drop-down box, select Other Content
5. Select the title of the shared content that was previously created and wish to input
6. Click OK
7. The shared text will appear in a blue box in the Page Body
8. Click OK to save changes

## Tables

To simplify table creation, CourseLeaf pre-determines how particular sets of data should be output on the page, and allows the editor to simply enter and arrange the data. This process ensures that the desired output is achieved while maintaining the integrity of the data.

When a formatted table has been inserted, the page body editor will display a blue border around the content. To edit the contents of this table, simply double click within the blue border.



**Marketing Major**

The Marketing major requires a minimum of 120 total hours to graduate. This total includes Liberal Arts Core requirements and the following specified major requirements, plus electives to complete the minimum of 120 hours. Liberal Arts Core courses included in major program requirements are distinguished by *italics*.

**Course List**

Required business core		
Business Administration, Interdepartmental:		
BUSINESS 1000 (100:010)	Freshman Seminar for Business Professionals	0
BUSINESS 2000 (100:020)	Business Professional in Training	0
Accounting:		
ACCT 2120 (120:030)	Principles of Financial Accounting	3
ACCT 2130 (120:031)	Principles of Managerial Accounting	3
Marketing:		

OK Cancel

Example of formatted table in the page body editor.

## Types of Formatted Tables

- Course Lists (p. 20)
- Plan of Study Grids (p. 27)
- Footnotes (p. 24)
- Course Blocks (p. 19)
- Shared Content (p. 17)
- Pre-Defined Tables (p. 29)

## Helpful Tips:

Tables from outside sources may not be pasted into CourseLeaf. Formatting carried over from word processing programs rarely translate into proper HTML markup. All tables must be built with the Formatted Tables editor.

## Course Descriptions

### Overview

Course Description tables allow a user to specify which course descriptions to display on a catalog page. Individual courses can be selected using the Course Descriptions (Per Course), and groups of courses with the same subject code can be selected using Course Descriptions (Per Department).

### How to Add Course Descriptions (Per Course)

1. Navigate to the page you'll be editing
2. Click the Edit page link

3. Place cursor in the page body where the Course Description table is to be placed
4. Click Insert/Edit Formatted Table
5. Select Course Description (Per Course) from the drop-down list and click OK
6. Click New Course
7. Use the course picker and double click on courses to add them.
  - Or use the Quick Add field to enter the subject and number of the course you want to add
8. Click OK
9. Click OK in Page Body to save your changes

**Note:** Courses added using Course Descriptions per course do not automatically get removed from the Course Description table when they become inactivated in SIS.

## How to Add Course Descriptions (Per Subject)

1. Navigate to the page you'll be editing
2. Click the Edit page link
3. Place cursor in the page body where the Course Description table is to be placed
4. Click Insert/Edit Formatted Table
5. Select Course Description (Per Subject) from the drop-down list and click OK
6. Use the picker to select the subject you want to add
7. Click OK
8. Click OK in Page Body to save your changes

**Note:** Courses will automatically be added and removed from the Course Descriptions per Subject table when courses are added, removed, or made inactive in SIS.

## Course Lists

### Overview

A Course List is a type of table within CourseLeaf. Courses in a Course List are linked back to data exported from your SIS in order to provide immediate access to course information. A course list provides information in a pre-formatted table structure and is different from a Plan of Study Grid (p. 27) in that it does not require the selection of a year or term. Course lists are primarily used to display Program of Study requirements (Majors, minors, certificates, etc.) and are customized from institution to institution.

### Course List Fields

The fields within the course list table allow editors to assign specific information to individual courses.

The screenshot shows the 'Course List' interface. On the left, a list of courses is shown with columns for 'Select Course to Add to List', 'Move Selected Course in/out of Course List', 'Courses Currently in Course List', and 'Auto Sum Hours Within Course List'. The 'Sum Credits' checkbox is checked. On the right, a detailed view of a selected course (HIST 111) is shown, with fields for Comment, Sequence, Cross Reference, Hours, Or Class, and Footnote. Below these fields are checkboxes for 'Indent' and 'Area Header', and buttons for 'Move Up', 'Move Down', 'OK', and 'Cancel'. A table on the right shows a list of courses with their titles and credit hours, totaling 30 credits.

HIST 101	History of Western Civilization	3
HIST 102	United States History (See Instructor) <sup>1</sup>	3
	and HIST 111 <sup>2</sup> and The American Military <sup>4</sup>	3
HIST 103	The 20th Century	3
HIST 104 / 113 <sup>3</sup>	World History	3
HIST 105	European History * <sup>6</sup>	3
	or HIST 112 <sup>5</sup> Modern Britain	
HIST 106	Asian History	3
<b>Select from following: <sup>8</sup></b>		3
<sup>7</sup> HIST 107	African American History	
HIST 108	Technology and Civilization	
HIST 109	History of Science	
<b>Total</b>		<b>30</b>

- Comment** - A comment will be displayed in parentheses after the course title
- Sequence** - Sequence will display two courses with an ampersand (&) indicating that these two courses must be taken in conjunction with each other.
- Cross Reference**- A cross reference course describes a course that is the same course content offered under different course numbers
  - For instance, if credit is given at both the undergraduate and graduate level.
  - Another example is a course that is offered by different departments for credit.
- Hours** - The hours field is automatically populated with the credit hours assigned to the course in your student information system.
  - You can change these as necessary.
- Or Class** - This will display two courses with the word "or" indicating that either course may be taken to meet the requirement.
- Footnote** - Only the footnote symbol is entered in the course list, then add a Footnote table (p. 24) after the course list in the Page Body.
- Indent** - The item will be indented to the right, the credit hours will be suppressed from displaying, and credit hours will be suppressed from adding to your Total Credits. You may also use the hotkey Alt+I to select this check box.
  - For example, a Comment Entry of "Select one of the following:" may proceed a list of indented courses. This allows users to see all of the options, without adding the credit hours of each course to the Total Credits.
- Area Header** - The item will be styled as a header within the table. You may also use the hotkey Alt+A to select this check box.
  - This option is typically used to logically group courses within a Course List.
  - For example grouping "Elective Courses" separately from "Required Courses".

*Note: Multiple course codes may be added in the Sequence, Cross Reference or Or Class fields, separated by a comma. To include an ampersand (&) in an Or Class, include the ampersand. For instance, to display ACCT 101 OR ACCT 102 & ACCT 103, put ACCT 102 & ACCT 103 in the Or field of the ACCT 101 course.*

## How to Add a Course List

- Open the toolbar and click Edit Page
- Place cursor in page body where the course list is to be placed
- Click Insert/Edit Formatted Table
  - Note:* using Ctrl+T keyboard shortcut will also bring up the Insert/Edit Formatted Table interface
- Select Course List from drop-down menu
- Click OK
- Insert courses
  - Select **College** and **Department** from drop-down menus. *Note: The left hand column will populate the Course Inventory, or a list of courses to choose from to add to a list based on the College and Department selected. The right hand column is the courses used to build the list.*
  - Option 1

- i Select a course from Course Inventory.
    - ii Click (>>) button to add a course to the list.
  - c. Option 2
    - i Double-click a course from Course Inventory.
  - d. Option 3
    - i Enter a course code into **Quick Add**.
    - ii Click Add Course.
7. Click OK in the Course List editing screen to close the Course List screen and refresh the Page Body. Click OK when finished to save any changes made.

## How to Remove a Course from a Course List

1. Open the toolbar and click Edit Page
2. Double click on the course list containing the course you want to remove
3. Select the course you want to remove
4. Click (<<) button to remove a course from the list
5. Click OK in the Course List editor to save your change back to the Page Body editor
6. Click OK on the Page Body editor to save all of your changes

## How to Reorder a Courses in a Course List

1. Open the toolbar and click Edit Page
2. Double click on the course list containing the courses you want to reorder
3. Select the course to move
4. Click Move Up or Move Down to change the order of the course
5. Click OK in the Course List editor to save your change back to the Page Body editor
6. Click OK on the Page Body editor to save all of your changes

## How to Add a Comment Entry

A comment entry is anything in your Course List that is not a course. Comment entries are often used to create headers within your table or to relay instructions like "Choose one of the following".

1. Open the toolbar and click Edit Page
2. Double click on the course list to which you want to add your comment entry
3. Select in right list where **Comment Entry** is to be placed
4. Click Add Comment Entry. A text window will open.
5. Enter text to be placed in course list.
6. Click OK in the Course List editor to save your change back to the Page Body editor
7. Click OK on the Page Body editor to save all of your changes

*Note: If a course code (e.g. ENGL 101) is found in a comment entry, the course code will display the course bubble as all other course codes in the course list.*

## Helpful Hints

### Comment Entries that Mimic Course Entries

To make a comment entry that will mimic a course entry, such as any free elective with a course number that begins ENG, add a comment and enter ENG XXX::Free elective in ENG. The double colon (::) between the XXX and *Free elective* will force the part before the double colon to be entered in column 1 and the part after the double colon to be entered in column 2.

Comment: HIST 1XX::100 Level History Course

Sequence:

#### Course List

<a href="#">POLS 041</a>	U.S. Government and Politics	4
<a href="#">INTL 113</a>	World Geography for the Social Sciences	4
<a href="#">HIST 130</a>	History of California	3-4
<a href="#">HIST 021</a>	United States History II	3-4
<a href="#">HIST 020</a>	United States History I	4
<a href="#">ECON 051</a>	Economic Principles and Problems	3
HIST 1XX	100 Level History Course	
Total Units		22

### Display One Set of Hours and Use Different Hours in Total Calculation

This only works in course list tables. This does not work in plan grids.

**Course List**
✕

Arts and Sciences ▼  
 Biology (BIOL) ▼  
**BIOL 106 Environmental Biology Lab**  
 BIOL 107 Biotechnology and Society  
 BIOL 111 General Biology  
 BIOL 112 General Biology  
 BIOL 115 Principles of Biology  
 BIOL 117 Introductory Physiology  
 BIOL 122 Human Sexuality  
 BIOL 124 The Human Environment  
 BIOL 193 Special Topics  
 BIOL 193A Special Topics  
 BIOL 215 Cell-Biology for Pre-Pharmacy  
 BIOL 219 The Living Cell  
 BIOL 221 Ecology And Evolution  
 BIOL 230 Human Anatomy and Physiology 1  
 BIOL 231 Human Anatomy and Physiology 2  
 BIOL 233 Anatomy and Physiology  
 BIOL 235 Human Physiology

>>
<<

**Major Requirements**

 BIOL 101 General Biology  
 BIOL 102 General Biology  
**BIOL 103 General Biology Laboratory**  
 BIOL 104 General Biology Laboratory  
 BIOL 105 Environmental Biology

Sum Hours

Comment:

Sequence:

Cross Reference:

Or Class:

Hours: 1-2::2

Footnote:

Indent
 Area Header

Move Up
Move Down

Quick Add:  Add Course  
Add Comment Entry

OK Cancel

1. Open the Course List by double clicking inside the blue box
2. Select the course with the hours you want to manipulate
3. In the Hours field, put :: after the hours to display
4. After the :: put the hours to be used in the calculation

Example:

3-4::4 This tells the system to display 3-4 in the table but add 4 for the total at the bottom of the table.

## Footnotes

### Overview

Footnotes have two parts within CourseLeaf, a footnote indicator (<sup>12\*</sup>) and a footnote table. Footnote indicators go next to the text or course item, and footnote tables are used to articulate footnotes. Footnote indicators and entries in the footnote table are not automatically linked. This means that when a new indicator is added an entry must also be added to the table. Likewise, if an entry in the table is deleted, the indicator must also be deleted.

### How to Insert a Footnote Indicator within Text

1. Place cursor in the page body editor where the footnote indicator is to be placed
2. Type the number, or use the Insert Special Characters (Omega) tool to add the footnote symbol
3. Highlight the character and click the Superscript tool
4. Click OK to save the page



## How to Insert a Footnote Indicator in a Course List or Plan Grid

1. Create a course list or plan grid or open the table editor
2. Click on the course that should have the indicator
3. Enter the indicator in the footnote field
4. Click OK to save the table
5. Click OK to save the page

## How to Insert a Footnote Table

1. Place cursor in the page body where the footnote table is to be placed
2. Click Insert/Edit Formatted Table
3. Select Footnotes from the drop-down menu and click OK
4. In the Footnotes editor, click New Footnote.
5. Enter the footnote symbol
6. Enter the footnote content
7. Repeat to add more footnotes as necessary
8. Click OK to save the table
9. Click OK to save the page

## How to Edit or Delete a Footnote

1. Double-click the footnote table blue box
2. Select the footnote indicator
3. Enter the footnote content OR Click Delete
4. Click OK to save the table
5. Click OK to save the page

**Note:** Be sure to also edit the corresponding footnote entry in your footnote table.

## Formatted Content from Data

### Overview

CourseLeaf can format content, called structured content, from a data source. That data source may be a data feed from an outside system, a dbLeaf, or from an uploaded data source like a spreadsheet. The format of that content is pre-determined per institution. Commonly faculty information is drawn from a data source in this way.

### How To Add Structured Content to a Page

1. Place cursor in the page body where the content is to be placed
2. Click Insert/Edit Formatted Table
3. Select the appropriate item from the drop-down menu (e.g.: Faculty) and click OK
4. Complete the form as necessary.
5. Click OK to add the content to the page.
6. Click OK to save the page.

### How To Delete Structured Content from a Page

1. Click on the blue box around the content to select.
2. Press the delete button on your keyboard.
3. Click OK to save the page.

### How to Update Structured Content on a Page

After updating the data source it will be necessary to republish the pages that contain that content. A page may be republished by clicking the Setup tool and clicking OK. To redraw structured content to all pages, Refresh the System.

## On This Page Navigation

### Overview

On This Page Navigation automatically generates a list of anchor links, which allow users to jump to a specific part of the page.

### On This Page Navigation Fields

On This Page Navigation
X

**Title**

**Elements to Link**

 H2
 

**Tabs to Show Links**

 Overview
 

**Show Tab Name**

**Nest Links**

**Sort Alphabetically**

**Max items Before Depth Drop**

1. **Title:** Identify the title heading above the link list
2. **Elements to Link:** Identify each heading level which should display in the anchor list
3. **Tabs to Show Links:** Identify which tabs should display in the anchor list
4. **Show Tab Name:** Identify the tab organization. Should the name of each tab display as a heading above the anchors from that tab
5. **Nest Links:** Identify the indentation style. When selected sub headings will be indented.
6. **Sort Alphabetically:** Identify the ordering of links. Should items display in alphabetical order or in the order they appear on the page
7. **Max items Before Depth Drop:** Identify the number of total links for display before removing all nested links a certain depth. This is useful when linking to all headings on a page would produce a long list of anchor links. If you'd like a maximum of ten links, place "10" in the Max items Before Depth Drop field. Links will display based on the hierarchy of their heading level. (i.e., if there are 12 links on a page: two H2, six H3, and four H4, and the depth drop is set to 10. Then all H2 and H3 headings will display, and all of the H4's will be dropped).

## How to Add On This Page Navigation

1. Open the toolbar and click Edit Page
2. Place cursor in page body where the links are to be placed
3. Click Insert/Edit Formatted Table
  - Note: using Ctrl+T keyboard shortcut will also bring up the Insert/Edit Formatted Table interface
4. Select On This Page Navigation from drop-down menu
5. Click OK
6. Select the field options for display
7. Click OK to generate the structured content
8. Click OK in the page body editor to save

## How to Edit On This Page Navigation

1. Open the toolbar and click Edit Page
2. Double click on the On This Page Navigation
3. Edit the field options
4. Click OK to generate the structured content
5. Click OK in the page body editor to save

## Plan of Study Grids

### Overview

Plan of Study Grid is a type of table within CourseLeaf used to articulate a suggested sequence of required courses. Courses in a Plan of Study Grid are linked to a central database in order to provide immediate access to course information. A Plan of Study Grid provides information in a pre-formatted table structure and is different from a Course List (p. 20) in that it articulates course sequencing. Plan of Study Grids are primarily used to display the sequencing of Programs of Study (Majors, minors, certificates, etc.).

### Plan Grid Fields

Plan of Study Grid fields allow editors the ability to better describe individual courses. Select a course in the right list to edit the fields for the selected course.

The screenshot shows the 'Plan Grid' dialog box. It is divided into three main sections: 'Select Course to Add to List', 'Move Selected Course in/out of Plan Grid', and 'Courses Currently in Plan Grid'. The 'Courses Currently in Plan Grid' section contains a list of courses with their titles and credit hours. Below this list are fields for 'Comment', 'Sequence', 'Cross Reference', 'Hours', 'Or Class', and 'Footnote'. There are also 'Move Up' and 'Move Down' buttons. At the bottom, there are 'OK' and 'Cancel' buttons. A legend at the bottom of the page explains the numbered callouts: 1. Enter Course Code to Add to Plan Grid, 2. Click to Enter a Comment Line, 3. OK to Submit Page, 4. Cancel to Exit.

HIST 101	History of Western Civilization	3
HIST 102	United States History (See Instructor) <sup>1</sup>	3
	and HIST 111 <sup>2</sup> and The American Military <sup>4</sup>	3
HIST 103	The 20th Century	3
HIST 104 / 113 <sup>3</sup>	World History	3
HIST 105	European History * <sup>6</sup>	3
	or HIST 112 <sup>5</sup> Modern Britain	
HIST 106	Asian History	3
<b>Select from following:</b>		3
<sup>7</sup> HIST 107	African American History	
HIST 108	Technology and Civilization	
HIST 109	History of Science	
<b>Total</b>		<b>30</b>

1. **Comment** - A comment will be displayed in parentheses after the course title

2. **Sequence** - Sequence will display two courses with an ampersand (&) indicating that these two courses must be taken in conjunction with each other
3. **Cross Reference**- A cross reference course describes a course that is the same course content offered under different course numbers
  - For instance, if credit is given at both the undergraduate and graduate level
  - Another example is a course that is offered by different departments for credit
4. **Hours** - The hours field is automatically populated with the credit hours assigned to the course in your student information system
  - You can change these as necessary
5. **Or Class** - This will display two courses with the word "or" indicating that either course may be taken to meet the requirement
6. **Footnote** - Only the footnote symbol is entered in the course list, then add a Footnote table (p. 24) after the course list in the Page Body

## How to Insert a Plan of Study Grid

1. Click Edit Page
2. Open the page body editor
3. Place cursor in page body where you would like to insert the Plan of Study Grid in the Page Body
4. Click Insert/Edit Formatted Table
5. Select Plan of Study Grid from the drop down menu
6. Enter the course information
7. Click OK to save your table
8. Click OK to save your changes

## How to Add a Course to a Plan of Study Grid

1. Click Edit Page
2. Open the page body editor
3. Double click anywhere within the blue line around the Plan of Study Grid
4. Insert courses
  - a. Select **College** and **Department** from drop-down menus.
    - **Note:** *The left hand column will populate the Course Inventory, or a list of courses you can choose from to add to your grid based on the College and Department selected. The right hand column is where you move the courses to build the grid.*
  - b. Select **Year** and **Term** to insert course.
  - c. Select in the right hand list where the new course is to be inserted (the course will be placed under the selected course).
  - d. Option 1
    - i. Select course from **Course Inventory**.
    - ii. Click (>>) button to add a course to the grid.
  - e. Option 2
    - i. Double-click course from **Course Inventory**.
  - f. Option 3
    - i. Enter course code into **Quick Add**.
    - ii. Click Add Course.
5. Click OK to save your table
6. Click OK to save your changes

## How to Add Comment Entry

1. Click Edit Page
2. Open the page body editor
3. Double click anywhere within the blue line around the Plan of Study Grid
4. Select **Year** and **Term** to insert comment.
5. Select the course below which the **Comment Entry** will be placed
6. Click Add Comment Entry
7. Enter text for the Comment Entry
8. Click OK to save your table
9. Click OK to save your changes

## How to Remove a Course or Comment Entry

1. Click Edit Page
2. Open the page body editor
3. Double click anywhere within the blue line around the Plan of Study Grid
4. Select **Year** and **Term** of course to remove.
5. Highlight course in right list.
6. Click (<<) button to remove a course from the grid.
7. Click OK to save your table
8. Click OK to save your changes

## How to Reorder a Plan Grid

1. Click Edit Page
2. Open the page body editor
3. Double click anywhere within the blue line around the Plan of Study Grid
4. Select **Year** and **Term** to insert course.
5. Highlight course or comment entry to move in right list.
6. Click Move Up or Move Down to change the order.
7. Click OK to save your table
8. Click OK to save your changes

## Pre-Defined Tables

### Overview

Pre-Defined Tables are designed for each client specifically. With all pre-defined tables, the format is determined by the kind of table selected, but the content of the table is created by the user. If you need a new pre-defined table option added to your list of tables, please contact Leapfrog Support.

### How to Insert a Pre-Defined Table

1. Click Edit Page
2. Open the page body editor
3. Place cursor in the page body where the table is to be placed
4. Click Insert/Edit Formatted Table
5. Select Pre-Defined table from the drop-down menu and click Ok
6. To add a new row to the table, click New Row, then enter desired content in the fields. Repeat as necessary.
7. Rows may be moved up or down with the Move Up or Move Down buttons.
8. Click OK to save your table
9. Click OK to save your changes

### Formatting Text in Pre-Defined Tables

Much of the format of pre-defined tables is controlled through the design of the site template, but some formatting can be controlled in text fields through special character combinations. To make text bold, surround the text in the field with \*\*. To indent a line in the table, prefix two greater-than signs. To indicate text should be superscript, surround the text with brackets. To use brackets rather than superscript, add one space after the initial bracket. Text beginning with http:// or www. will automatically be turned into hyperlinks. To make an area header for the table, surround the text of the first column in curly brackets.

### Examples

#### Example Input

\*bold\*  
 http://link  
 www.link  
 >> indent line  
 this is [superscript]  
 [ brackets] (note the space after first bracket)

#### Example Output

**bold**  
<http://this.gets.turned.to.a.link>  
[www.this.does.too](http://www.this.does.too) (p. 29)  
 indent line  
 this is <sup>superscript</sup>  
 [brackets]

\* bullet item  
{curly brackets}

• bullet item  
**spans the columns of the table**

## Site Map

### Overview

Site Map automatically generates a list of links to other pages based on the navigation, allowing a user to jump to a new page. They may appear with the use of the Formatted table tool, or generated on the page automatically by administrators. For more information on the auto-generated site map, see Site Map.

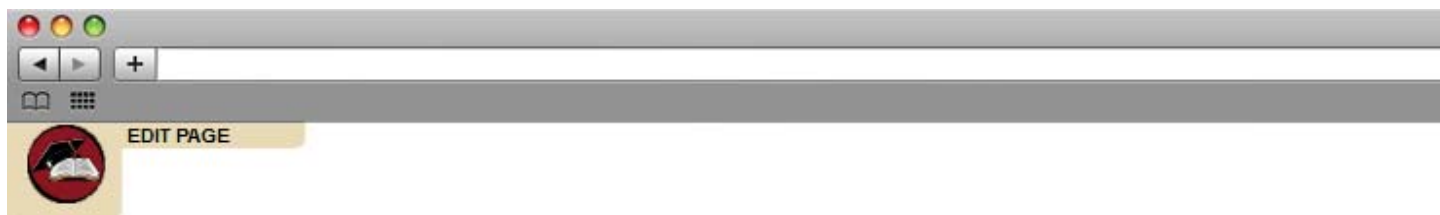
The screenshot shows the Sitemap configuration dialog. The 'Start Path URL' is set to '/'. The 'Degree Type' dropdown is open, showing 'All' selected. The 'A-Z Bar at Top' and 'Navigation' checkboxes are unchecked. The 'OK' button is highlighted in green.

### How To Add A Site Map

1. Open the page body editor of the page to add the site map and place your cursor where you want the site map to appear.
2. Click the Formatted table tool to add a new table, and choose Sitemap from the drop down.
3. In the Site Map tool, choose the start path URL, usually the page you are on. This is the page that the site map will start from.
4. Optionally, choose a Page Option. Page options are set on the Set Up tool (p. 34) of a page. Only pages with the option selected will be displayed in the Site Map.
5. Click the A-Z Bar at Top checkbox to place an A-Z bar for quick navigation. This is especially helpful for long site maps.
6. Click the Navigation checkbox to include sub-pages under the first level of start page.
7. If the Navigation checkbox is checked, enter a number in the field next to Navigation to indicate how deep to go in the site map. 1 indicates that you only want to show the pages directly under the start page. 2 would include the pages directly under the start page, and the children of those pages.
8. Click OK to place the Site Map on the page.
9. Click OK to save the page.

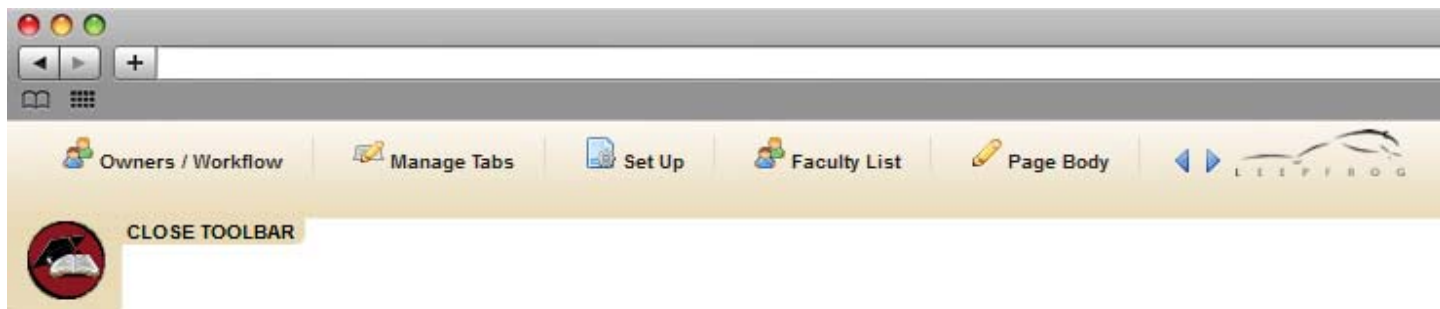
### Toolbar

Every page managed by CourseLeaf will have an "Edit Page" tab in the upper left corner of the page. Clicking on this tab will prompt the user to log in, or will reveal the top and bottom CourseLeaf toolbars if he/she is currently logged in.



The default Edit Page icon will appear in the top left corner of the page.

## The Top CourseLeaf Toolbar



The default CourseLeaf toolbar will appear at the top of the page.

The top toolbar will contain the functions that are available for that page and user role. For example, if a user is logged in as an Administrator, the user will have access to more tabs on the CourseLeaf toolbar than an author or end-user might. In order to navigate the toolbar from left to right, use the blue arrow icons or the mouse scroll wheel as needed to see additional controls for that page. Use the links below for more information about specific functions:

- Owners & Workflow (Administrator Function)
- Manage Tabs (Administrator Function)
- Setup / Title (p. 34)
- Faculty List (p. 32)
- Page Body
- Accuracy Report (p. 32)
- Show Differences (p. 36)
- View as PDF (p. 36)

*Note:* The functions listed above are the default items in the toolbar. The items in the toolbar vary greatly and may be different than the items listed above.

## The Bottom CourseLeaf Toolbar

The bottom toolbar gives a user details about the session, the owners of the page, current workflow status, and other various information about the page. When a user is finished editing, it is important to remember to click "Start Workflow" in the bottom right corner of the page to send the page to the next step in the workflow. More information about workflow.

For end-users not assigned to the page, rather than the Start Workflow button, the View Changes button will appear. This will allow you to view the current edits in red/green markup.



The default bottom CourseLeaf Toolbar will appear at the bottom of the page.

## Accuracy Report

### Overview

The Accuracy Report generates a list of errors when there are red boxes and unapproved shared content on a catalog page; the report includes errors for all tabs on the page. To get a list of errors for the entire catalog, an admin would have to click Republish Site on the Catalog Console.

### How to Run an Accuracy Report

1. Click Edit Page
2. Click Accuracy Report
3. Results will be automatically generated
4. Click Close Window to leave the report

**Note:** The Accuracy Report does not check shared content or CIM programs.

## Comments

### Overview

The Comments tool allows page owners and approvers to add comments to a catalog page to clarify decision for workflow. Comments are not published on the catalog page.

### How To Add and Review Comments as a Page Owner

1. Navigate to the page to comment on and click Edit Page to reveal the toolbars.
2. Click the bubbles icon in the upper-right corner of the toolbar.
3. To add comments, type comments in the Add Comment box and click Save.
4. Click close.

### How To Add and Review Comments as an Approver

1. Navigate to the Catalog Console or click the Page Approval link from the automated email.
2. Click on the page in the Pending Pages window.
3. Click the Edit button to reveal the toolbar.
4. Click the bubbles icon in the upper-right corner of the toolbar.
5. To add comments, type comments in the Add Comment box and click Save.
6. Click close.

## Faculty List

### Overview

Faculty List allows a user to manage faculty listings within the catalog. Using the Faculty List tool will cause a faculty tab to display on the page. Each institution has a customized faculty display, so your faculty list tool may look different than the one illustrated here.

### How to Add Faculty Members

1. Click the Faculty List tool
2. Select the desired title or category from the drop-down list (*Example: Chair; Professor, Assistant Professor*)
3. Above the box on the right side of the designated title, click the green button to add a faculty member
4. Enter all faculty information into the Edit Faculty pop up
5. Click OK. The member's name that is entered, should now show up in the box on the right side, along with the category selected for them
6. Repeat steps 3-6 to add additional faculty
7. Click OK to save all changes and exit the faculty list tool

### How to Edit Faculty Members

1. Click the Faculty List tool



2. Select the member that needs to be changed from the list in the box on the right
3. Click the pencil icon located just to the right of the person's name
4. An Edit Faculty window will open
5. Click OK to confirm the edits
6. Click OK to save all changes and exit the faculty list tool

## How to Rearrange the Faculty List

1. Click the Faculty List tool
2. To rearrange faculty members, select an individual faculty member
3. Click the green up or down arrow to move the selected member
4. Click OK to save all changes and exit the faculty list tool

## How to Delete Faculty Members

1. Click the Faculty List tool
2. Select whichever member needs to be deleted from the list in the box on the right
3. Click the red button located just to the right of the member's name
4. A window will pop up asking if the specific member should be deleted
5. Click OK to confirm the deletion
6. Click OK to save all changes and exit the faculty list tool

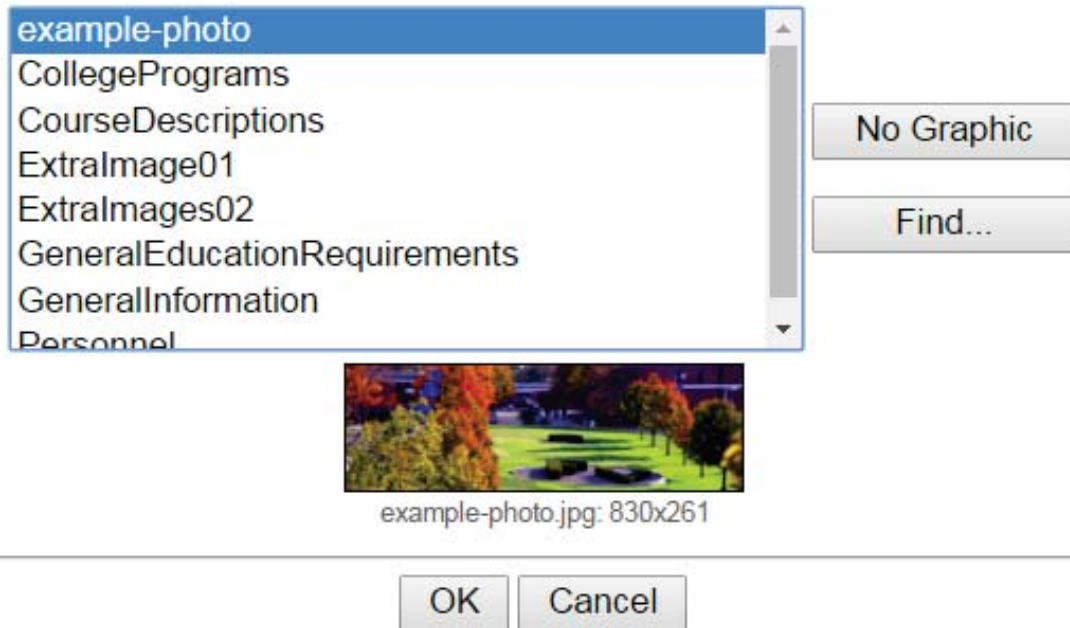
## Graphic

### Overview

The Graphic Tool allows an editor to add an image to a page in a consistent place. The size, position and attributes of the image are controlled centrally, but images may be customized for each page.



## Graphic



### How To Add/Edit/Remove a Graphic

1. Click the Edit Page icon to reveal the Top Toolbar
2. Click the Graphic tool (may also be called Banner or Image depending on the institution).
3. Choose the Graphic from the list. To remove the graphic, choose No Graphic.
4. Click OK.

### How To Add an Image to the Graphic Tool

To add an image to the Graphic Tool it must be added to the Image Library.



## Set Up



### Overview

Set Up allows a user to set up the page title and other information describing the page content (the "meta" characteristics of the page). Each institution has a customized set up display, so your Set Up tool may look different than the one illustrated here. If you are unsure of the functionality of any fields in your Set Up tool that are not described below, please contact your site administrator.

## Set Up

**Title:**

**College:**     
*(Ctrl+click to select multiple)*

**Department:**     
*(Ctrl+click to select multiple)*

**Department web site:**

**Page Description:**

**Keywords:**

**Special Content:**

Course Inventory

---

## How to Set Up a Page

1. Click Edit Page
2. Click the Set Up tool
3. Provide the information for all relevant fields, if available:
  - **Title:** The title will appear in the browser's title bar and at the top of the content
  - **College:** Select the appropriate college(s). Hold down the Ctrl key on your keyboard while you click to select multiple colleges
  - **Department:** Select the desired department(s) that go with the college. Hold down the Ctrl key on your keyboard while you click to select multiple departments
  - **Department Web Site:** Enter in the department website
  - **Other Fields:** Institutions may have other fields in the setup tool, such as contact name, address or phone. These fields will format the data entered on the page according to the page template. If the field is left blank, the information does not show on the page.
  - **Page Description:** Type a brief description of the page contents here. If this field is not completed, CourseLeaf will automatically take the first paragraph of the page or the Overview tab to display in the search results
  - **Keywords:** Type a list of keywords that describe the page content. Multiple keywords should be separated by a comma. See Search to learn more about keywords
  - **Special Content:** If courses should be available at the bottom of the page or tab, check the Course Inventory box. This will show the course code along with a short description. Whether courses appear in a tab or bottom of the page is set by the design template. *Note: the Course Inventory box is being phased out for many institutions*
  - **Page Options:** Page Options are additional customized fields that usually control other functionality throughout the catalog. For instance, a page option might exist to mark the page as a Program page, or to further mark it as a Major, Minor or Certificate. This can then be used in the Site Map tool (p. 30) to display only the pages with that option.
4. Click OK when finished to save any changes that were made.
  - *Note: clicking Cancel will not save any changes*

## Show Differences

### Overview

Show Differences presents a version of the current page with red/green mark up to show any changes that have been made to the page. Green text indicates an addition and red text with a strike through indicates a deletion. The Show Differences view will also show the latest approved content from CIM Programs or shared content. The page that is being edited will show the most recently edited content whether it is approved or not.

### How to Show Differences

1. Click Edit Page
2. Click the Show Differences tool
3. If any text was deleted and replaced with new text, the old text will still be visible in red with strike through. The new text will be displayed in green.
4. To return to the previous screen, click the red x to close the Show Differences window

## View as PDF

### Overview

View as PDF allows a user to view the current page as a PDF in a new window. A user cannot make any changes to the catalog page in the PDF. Updates to the catalog page must be made in the Page Body. Leepfrog recommends that users view each page as a PDF before submitting to the next phase in workflow.

### How to View as PDF

1. Click Edit Page on the top left corner of the screen to reveal the CourseLeaf toolbar.
2. Click the View as PDF tool.

### Benefits

- Save a copy of this PDF file
- Print the necessary information without having unnecessary features on the webpage
- Go to specific pages using Thumbnail Images
- Search for any specific words or phrases
- Export any PDF files