Table of Contents

Home ... 3

CourseLeaf ... 4

- Browsers ... 4
- Web Site Accessiblity ... 5
- Showing Differences (Red/Green Markup) ... 5

CourseLeaf Catalog (CAT) ... 7

- Borrowed Content ... 8
- Inline Course ... 9
- Page Body Editor ... 10
  - Cut, Copy, Paste, Delete ... 10
  - Edit HTML Source ... 10
  - Find, Replace, Reveal ... 11
  - Format Text ... 12
  - Links ... 13
  - Manage Selected Content ... 15
  - Remove Formatting ... 17
  - Special Characters & Horizontal Rules ... 17
  - Undo & Redo ... 17
- Shared Content ... 18
- Tables ... 19
  - Course Descriptions ... 20
  - Course Lists ... 21
  - Footnotes ... 26
  - Formatted Content from Data ... 27
  - On This Page Navigation ... 27
  - Plan of Study Grids ... 29
  - Pre-Defined Tables ... 31
  - Site Map ... 32
- Toolbar ... 34
  - Accuracy Report ... 35
  - Comments ... 36
  - Set Up ... 38
  - Show Differences ... 39
  - View as PDF ... 39

Additional Resources 91

Frequently Asked Questions 91

Home

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.

Latest Release Notes

CAT (https://help.courseleaf.com/addt-resources/cat-release-notes/3-10/) | CIM (https://help.courseleaf.com/addt-resources/cim-release-notes/3-8/) | CLSS (https://help.courseleaf.com/addt-resources/clss-release-notes/2-2-8/)

CourseLeaf

- Browsers (p. 4)
- CourseLeaf Console (https://help.courseleaf.com/general/console/)
- Data Flow (https://help.courseleaf.com/general/data-flow/)
- DBLeaf (https://help.courseleaf.com/general/dbleaf/)
- Migrate Programs from CAT to CIM (p. 50)
- Placing CIM Programs in CAT (p. 55)
- Reporting (https://help.courseleaf.com/general/reporting/)
- Student Aware Module (SAM) (https://help.courseleaf.com/general/sam/)
- Web Site Accessibility (p. 5)
- Showing Differences (Red/Green Markup) (p. 5)
- Data Warehouse (https://help.courseleaf.com/general/tcfdb/)

Overview

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

Browsers

Overview

CourseLeaf is browser agnostic and supports industry-standard browsers and devices. CourseLeaf supports the current and the previous release of the following browsers:

- Mozilla Firefox - Includes Extended Support Release (ESR)
- Google Chrome
- Apple Safari
- Microsoft Edge

Each time a new browser version is released, we begin supporting that version and stop supporting the third most recent version. Leepfrog performs rigorous testing across browsers to ensure maximum compatibility and functionality.

As of CAT 3.5.10, Adobe Flash is not required. Previous versions of CourseLeaf require Adobe Flash Player version 9+ to upload, 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 in 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: The Link phrase

Make Link a Parent

An error is shown on clicking **Apply** when the "Make this link a parent" check box is selected.

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

Workarounds

- Use another supported browser

PDF TOC Editor

When generating a PDF, though the PDF generates, the screen does not update to say it is complete.

Workarounds

- Use Firefox when generating PDFs
- After generating, wait at least 60 minutes, then navigate to the file that was generated. The file will be in the /pdf directory and named the same as the title of the PDF. For instance, if the PDF was named "2019-2020 Undergraduate," then the PDF would be found at /pdf/2019-2020%20Undergraduate.pdf (note that spaces in file names are escaped in browser URLs with %20)

Website 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. 12) 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. 12) to nest your headings appropriately
   - If Heading 1 corresponds to the title on your page, start headings in your Page Body Editor with Heading 2
   - Subheadings of Heading 2 should be Heading 3, etc.
3. If you use images (https://help.courseleaf.com/cat/page-body/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		
~~CHEM 470~~	~~Thermodynamics & Kinetics~~	~~3~~
CHEM 454	Inorganic Chemistry II	3
CHEM 454L	Inorganic Chemistry II Laboratory	1
CHEM 466	Fundamentals of Physical and Biophysical Chemistry	4
CHEM 443	Instrumental Analysis III - Chromatography/Mass Spectrometry [3]	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 addition, it will just appear as normal text. Nothing actually changed from the 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)

- CAT Release Notes (https://help.courseleaf.com/addt-resources/cat-release-notes/)
  - CAT Release Notes 3.5.1 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-1/)
  - CAT Release Notes 3.5.2 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-2/)
  - CAT Release Notes 3.5.3 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-3/)
  - CAT Release Notes 3.5.4 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-4/)
  - CAT Release Notes 3.5.5 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-5/)
  - CAT Release Notes 3.5.6 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-6/)
  - CAT Release Notes 3.5.7 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-7/)
  - CAT Release Notes 3.5.8 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-8/)
  - CAT Release Notes 3.5.9 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-9/)
  - CAT Release Notes 3.5.10 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-10/)
  - CAT Release Notes 3.5.11 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-11/)
  - CAT Release Notes 3.5.12 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-5-12/)
  - CAT Release Notes 3.6 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-6/)
  - CAT Release Notes 3.7 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-7/)
  - CAT Release Notes 3.8 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-8/)
  - CAT Release Notes 3.9 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-9/)
  - Cat Release Notes 3.10 (https://help.courseleaf.com/addt-resources/cat-release-notes/3-10/)
- Administrators (https://help.courseleaf.com/cat/administrators/)
  - A-Z Index (https://help.courseleaf.com/cat/administrators/azindex/)
  - Annual Checklist (https://help.courseleaf.com/cat/administrators/annual-checklist/)
  - Catalog Console (https://help.courseleaf.com/cat/administrators/administrative-console/)
  - CourseLeaf API (https://help.courseleaf.com/cat/administrators/clapi/)
  - Edit Navigation (https://help.courseleaf.com/cat/administrators/edit-navigation/)
  - Error Messages (https://help.courseleaf.com/cat/administrators/errormessages/)
  - Manage Tabs (https://help.courseleaf.com/cat/administrators/managetabs/)
  - Modes (https://help.courseleaf.com/cat/administrators/modes/)
  - Owners and Workflow (https://help.courseleaf.com/cat/administrators/owners-workflow/)
  - Page Filters (https://help.courseleaf.com/cat/administrators/filters/)
  - Publishing (https://help.courseleaf.com/cat/administrators/publishing/)
  - Site Map (https://help.courseleaf.com/cat/administrators/sitemap/)
  - SiteSearch (https://help.courseleaf.com/cat/administrators/search/)
- Borrowed Content (p. 8)
- Inline Course (p. 9)
- Page Body Editor (https://help.courseleaf.com/cat/page-body/)
  - Cut, Copy, Paste, Delete (p. 10)
  - Edit HTML Source (p. 10)
  - Find, Replace, Reveal (p. 11)
  - Format Text (p. 12)
  - About Links (p. 13)
  - Manage Selected Content (p. 15)
  - Remove Formatting (p. 17)
  - Special Characters & Horizontal Rules (p. 17)
  - Undo & Redo (p. 17)
- Shared Content (p. 18)
- Tables (p. 19)
  - Course Descriptions (p. 20)
  - Course Lists (p. 21)
  - Footnotes (p. 26)
  - Formatted Content from Data (p. 27)

    - Image Management (https://help.courseleaf.com/cat/tables/image-management/)
    - On This Page Navigation (p. 27)
    - Plan of Study Grids (p. 29)
    - Pre-Defined Tables (p. 31)
    - Sitemap (p. 32)
    - Video Tool (https://help.courseleaf.com/cat/tables/video/)
  - Toolbar (p. 34)
    - Accuracy Report (p. 35)
    - Comments (p. 36)
    - Faculty List (p. 36)
    - Graphic (p. 37)
    - Republish This Page (https://help.courseleaf.com/cat/toolbar/republishthispage/)
    - Revision History (https://help.courseleaf.com/cat/toolbar/revisionhistory/)
    - Set Up (p. 38)
    - Show Differences (p. 39)
    - View as PDF (p. 39)
  - Analytics (https://help.courseleaf.com/cat/analytics/)

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 (https://help.courseleaf.com/cat/administrators/administrative-console/createsharedpages/).

Borrowed Content can be displayed either in a new tab, which is created through Manage Tabs (https://help.courseleaf.com/cat/administrators/managetabs/) , 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 (https://help.courseleaf.com/cat/administrators/administrative-console/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 (https://help.courseleaf.com/cat/administrators/administrative-console/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 (https://help.courseleaf.com/cat/administrators/administrative-console/rebuild-course-bubbles/) 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

Overview

Learn how to copy, cut and paste using the Page Editor.

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
   Important: If pasting from Microsoft Word, use the Paste as Plain Text (Ctrl+Shift+V) or Paste from Microsoft Word button. This will remove word formatting, which can cause issues with functionality such as creating PDFs.
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. 19*). 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 ever 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

Leepfrog 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. Clik 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

About 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 theInsert/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 then it will appear in the PDF as 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. 38) 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 (p. 50) 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

Overview

Learn how to insert a horizontal line or special characters onto a page.

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 (https://help.courseleaf.com/cat/administrators/administrative-console/shared-content/).
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).
4. Shared content cannot be used within shared content. You may notice that the "Other Content" option that allows you to place shared content onto catalog pages does not show in the table tool drop down menu when you are in the Page Body Editor (https://help.courseleaf.com/cat/page-body/) for a shared page.

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 (https://help.courseleaf.com/cat/administrators/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
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

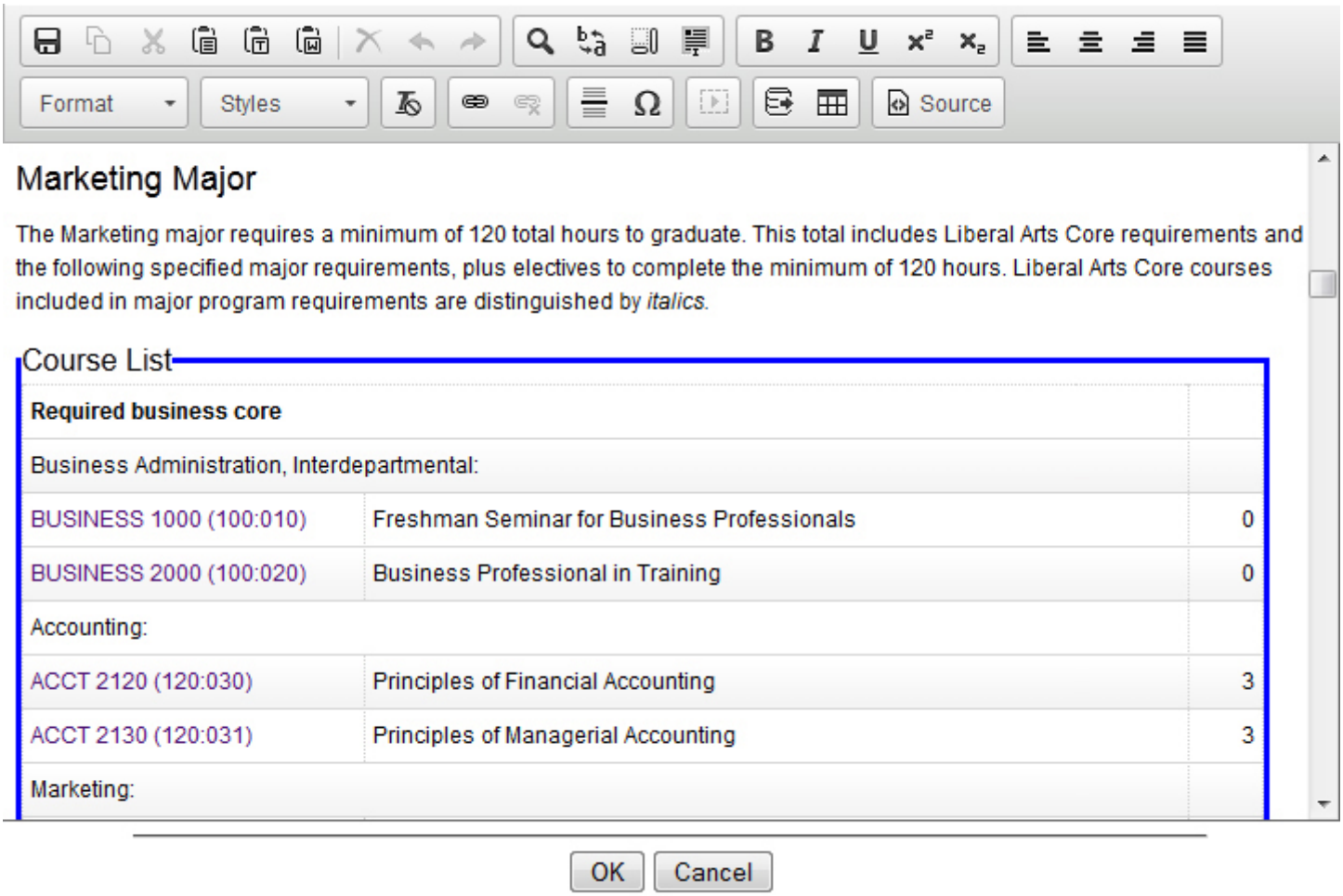
1. Navigate to the page in the catalog desired to insert the shared content
2. Position the cursor where the content should be placed
3. In the CourseLeaf toolbar up above, click on the Edit/Insert Formatted Table button
4. In the drop-down box, select Other Content
5. Select the title of the shared 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

Overview

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.



Example of formatted table in the page body editor.

Types of Formatted Tables

- Course Lists (p. 21)
- Plan of Study Grids (p. 29)
- Footnotes (p. 26)
- Course Blocks (p. 20)
- Shared Content (p. 18)
- Pre-Defined Tables (p. 31)

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.*

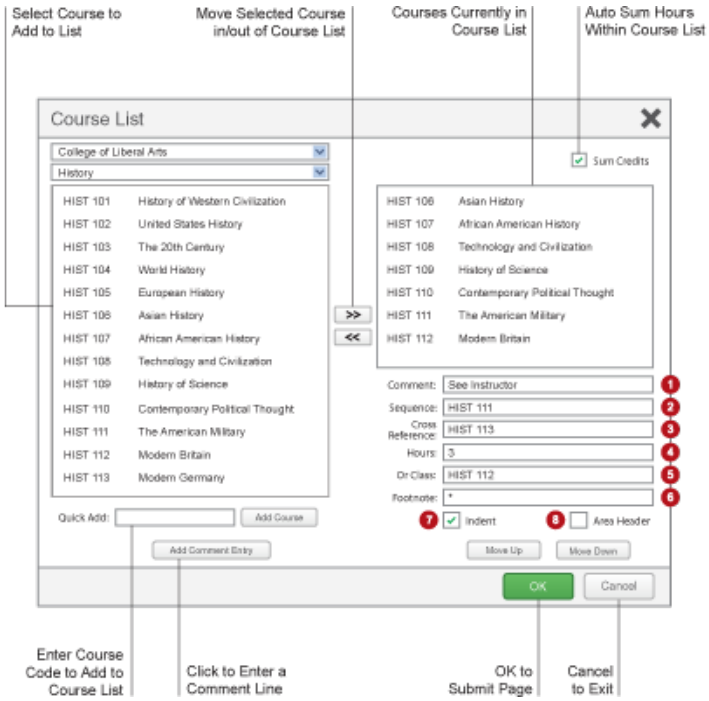
Course Lists

Overview

A Course List is a type of table within CourseLeaf. Courses in a Course List are linked to data exported from your SIS 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. 29) 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 unique to the institution.

Course List Fields

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



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

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 different departments offer credit for
4. **Hours** - The hours field automatically is populated with the credit hours assigned to the course in your SIS
   - 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, and then add a Footnote table (p. 26) after the course list in the Page Body
7. **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 precede a list of indented courses. This allows users to see all of the options without adding each course's credit hours to the Total Credits
8. **Area Header** - The item will be styled as a header within the table. You also may 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

1. Open the toolbar and click **Edit Page**
2. Place cursor in page body where the course list is to be placed
3. Click **Insert/Edit Formatted Table**
   - ***Note**:* Using Ctrl+T keyboard shortcut also will bring up the Insert/Edit Formatted Table interface
4. Select **Course List** from the drop-down menu
5. Click **OK**
6. 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 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*
   b. 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
8. 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 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 such as "Select 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 the right-hand 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 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.

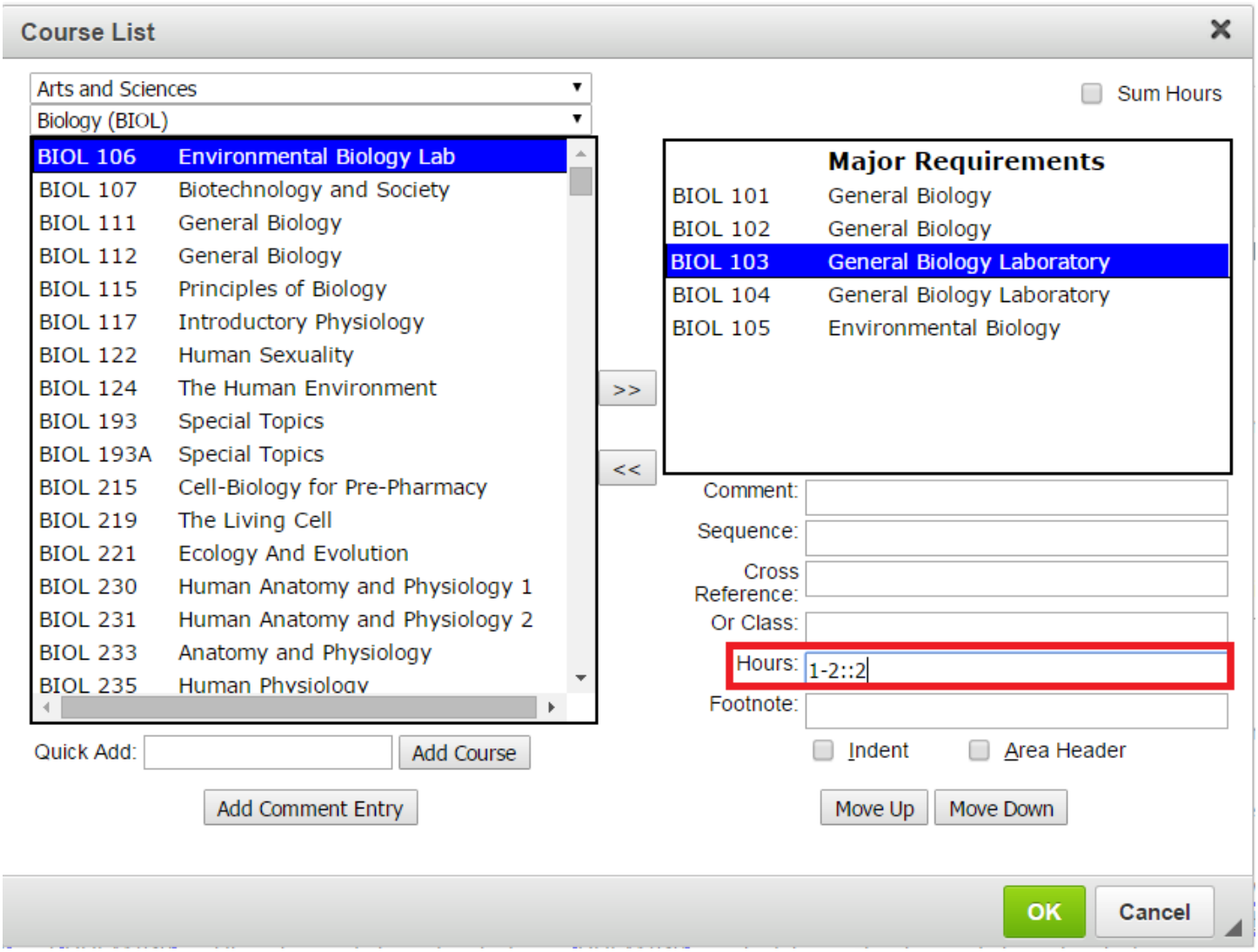
Comment: HIST 1XX::100 Level History Course

Sequence:

Course List

POLS 041	U.S. Government and Politics	4
INTL 113	World Geography for the Social Sciences	4
HIST 130	History of California	3-4
HIST 021	United States History II	3-4
HIST 020	United States History I	4
ECON 051	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



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.

Linking to Any Catalog Page

The ability to link to any catalog page may require a request to support.

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 the right-hand list where **Comment Entry** is to be placed
4. Click **Add Comment Entry**. A text window will open
5. Enter: linkurl^/relative-url-path/^text to display
   Example: *linkurl^/undergraduate-information/core-curriculum/^Theology*
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

Other Formatting Tips

Formatting can be controlled in text fields through special character combinations.

- To make text bold, surround the text in the field with **
- To add a bullet, add one space after the *
- 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

Example Input	Example Output
bold	**bold**
http://link	http://this.gets.turned.to.a.link
www.link	www.this.does.too
>> indent line	indent line
this is [superscript]	this is ^{superscript}
[brackets] (note the space after first bracket)	[brackets]
* bullet item	• bullet item
{curly brackets}	**spans the columns of the table**

Footnotes

Overview

Footnotes have two parts within CourseLeaf, a footnote indicator ($^{1\,2\,*}$) 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

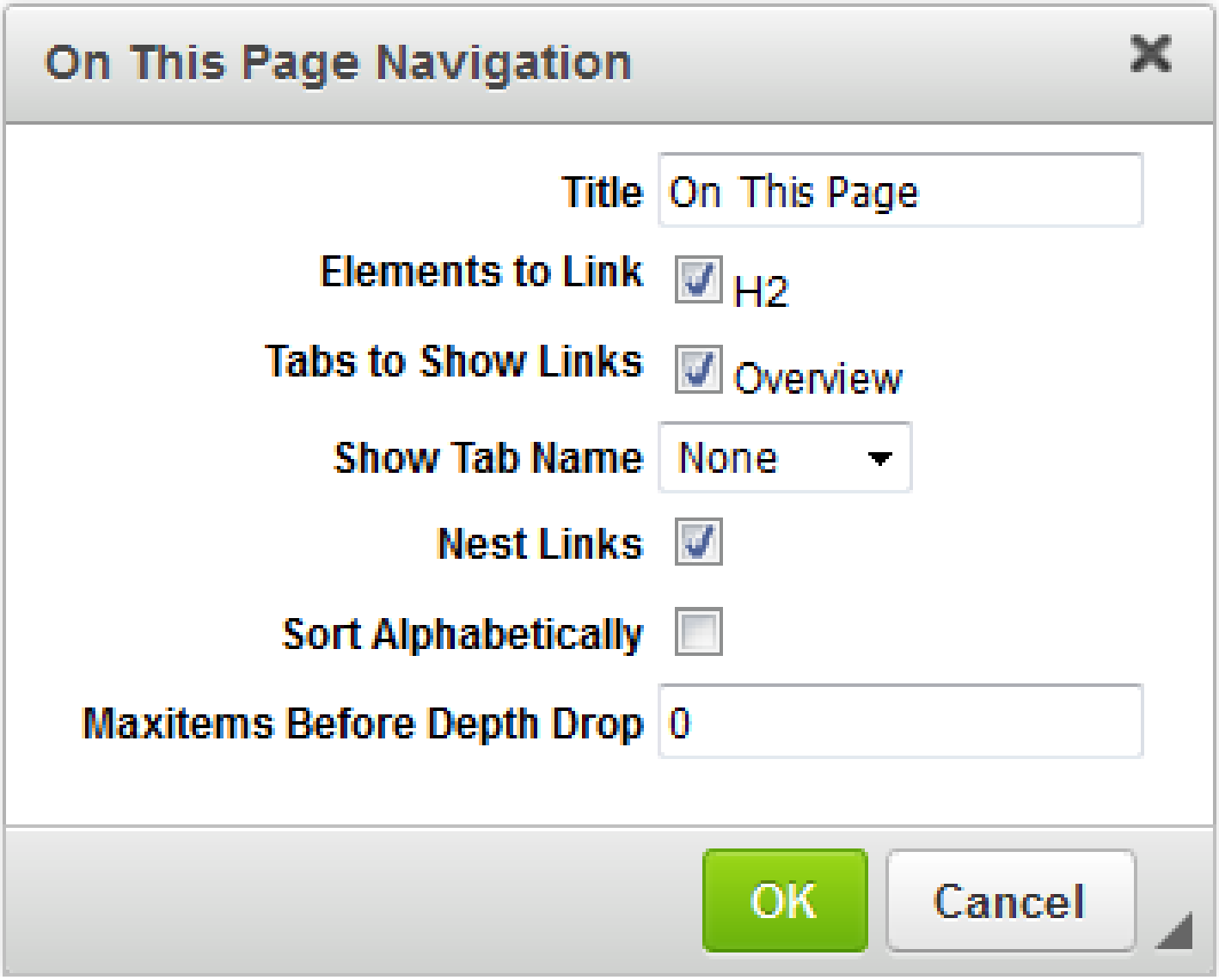
After updating the data source it will be necessary to republish the pages that contain that content. A page may be republished by clicking the Setup tool and clicking OK. To redraw structured content to all pages, use Republish Site (https://help.courseleaf.com/cat/administrators/administrative-console/republish-site/).

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



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

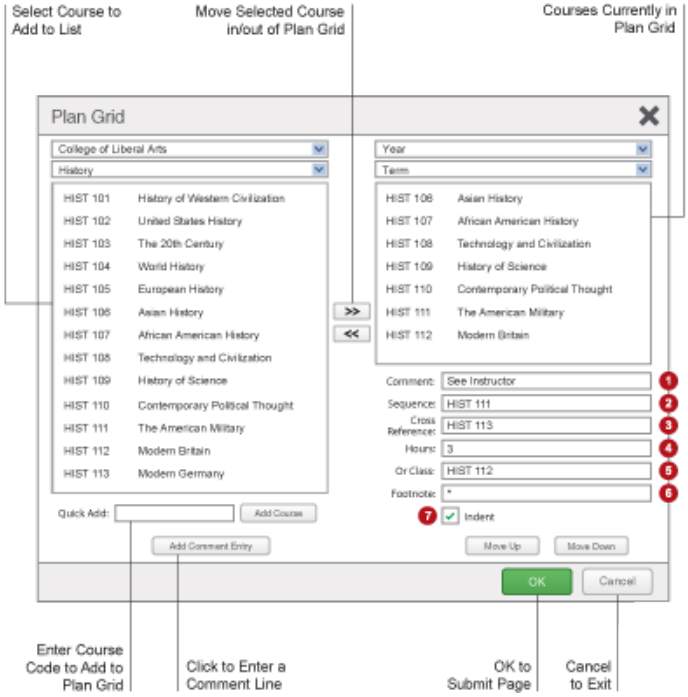
Plan of Study Grids

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. 21) 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.



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

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. 26) 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

Other Formatting Tips

Formatting can be controlled in text fields through special character combinations.

- To make text bold, surround the text in the field with **.
- To add a bullet, add one space after the *.
- 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.

Example Input	Example Output
bold	**bold**
http://link	http://this.gets.turned.to.a.link
www.link	www.this.does.too
>> indent line	indent line
this is [superscript]	this is ^{superscript}
[brackets] (note the space after first bracket)	[brackets]
* bullet item	• bullet item
{curly brackets}	**spans the columns of the table**

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 Leepfrog 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 add a bullet, add one space after the *. 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.

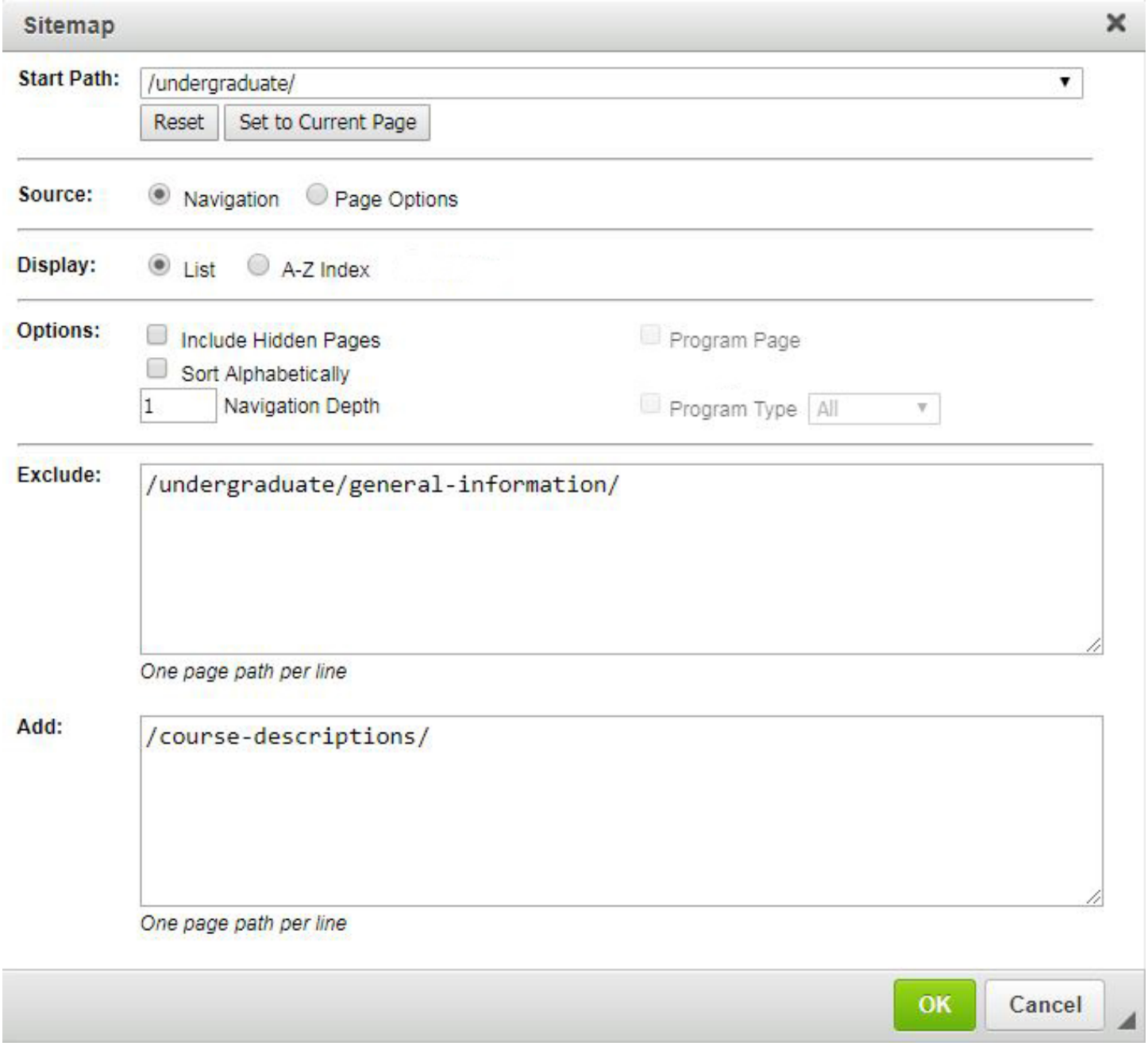
Examples

Example Input	Example Output
bold	**bold**
http://link	http://this.gets.turned.to.a.link
www.link	www.this.does.too
>> indent line	indent line
this is [superscript]	this is ^{superscript}
[brackets] (note the space after first bracket)	[brackets]
* bullet item	• bullet item
{curly brackets}	**spans the columns of the table**

Sitemap

Overview

Sitemap 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 sitemap, see Sitemap (https://help.courseleaf.com/cat/administrators/sitemap/).



How To Add A Sitemap Based on Navigation

1. Open the Page Body Editor of the page on which to add the sitemap.
2. Place your cursor where you want the sitemap to appear.
3. Click the Formatted table tool to add a new table, and choose Sitemap from the drop-down menu.
4. In the Sitemap tool, choose the start path URL, usually the page you are on, by beginning to type the relative URL or by selecting Set to Current Page. This is the page that the sitemap will start from.
5. Choose Navigation for Source.
6. Select the display you would like to appear on this page.
   a. A list will display as an unordered list.
   b. Click the A-Z Bar at Top checkbox to place an A-Z bar for quick navigation. This is especially helpful for long sitemaps.
7. Select the Options you would like to use for this sitemap.
   a. Checking the Include Hidden Pages checkbox will include pages in the designated directory that are hidden in navigation.
   b. Click the Sort Alphabetically checkbox to display links in alphabetical order.

   c. Enter a number in the field next to Navigation Depth to indicate how deep to go in the sitemap. The number 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. Exclude catalog pages from displaying in the sitemap by adding each page's relative URL (p. 13) on a separate line.
9. Add catalog pages to the sitemap display by adding each page's relative URL (p. 13) on a separate line.
10. Click OK to place the Sitemap on the page.
11. Click OK to save the page.

How To Add A Sitemap Based on Page Options

Page options are set on the Set Up Tool. Those options can be used as part of a Sitemap. See Set Up Tool (p. 38) for more information.

1. Open the Page Body Editor of the page on which to add the sitemap.
2. Place your cursor where you want the sitemap to appear.
3. Click the Formatted table tool to add a new table, and choose Sitemap from the drop-down menu.
4. In the Sitemap tool, choose the start path URL, usually the page you are on, by beginning to type the URL or by selecting Set to Current Page. This is the page that the sitemap will start from.
5. Choose Page Options for Source. *Note: selecting more than one page option indicates an "and" relationship. E.g.: selecting the page option "Program Page" and the page option "Policy Page" will only display pages that have both of those options selected.*
6. Select the display you would like to appear on this page.
   a. A list will display as an unordered list.
   b. Click the A-Z Bar at Top checkbox to place an A-Z bar for quick navigation. This is especially helpful for long sitemaps.
7. Choose a Page Option. Page options are set on the Set Up tool (p. 38) of a page. Only pages with the option selected will be displayed in the Sitemap.
8. Exclude catalog pages from displaying in the sitemap by adding each page's relative URL (p. 13) on a separate line.
9. Add catalog pages to the sitemap display by adding each page's relative URL (p. 13) on a separate line.
10. Click OK to place the Sitemap on the page.
11. Click OK to save the page.

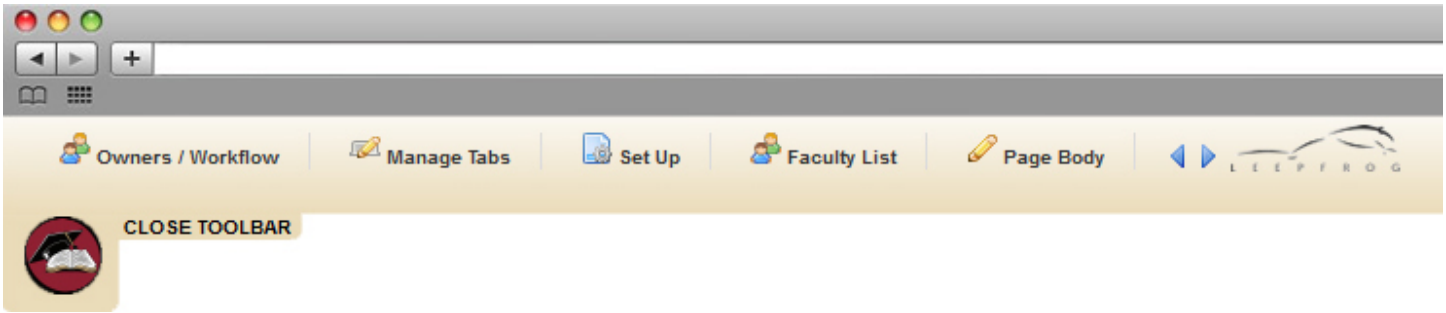
Toolbar

Overview

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 (https://help.courseleaf.com/cat/administrators/owners-workflow/) (Administrator Function)
- Manage Tabs (https://help.courseleaf.com/cat/administrators/managetabs/) (Administrator Function)
- Setup / Title (p. 38)
- Faculty List (p. 36)
- Page Body (https://help.courseleaf.com/cat/page-body/)
- Accuracy Report (p. 35)
- Show Differences (p. 39)
- View as PDF (p. 39)
- Republish This Page (https://help.courseleaf.com/cat/toolbar/republishthispage/)

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, revision history (https://help.courseleaf.com/cat/toolbar/revisionhistory/), 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 (https://help.courseleaf.com/cat/administrators/administrative-console/workflow-management/).

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 (https://help.courseleaf.com/cat/administrators/administrative-console/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

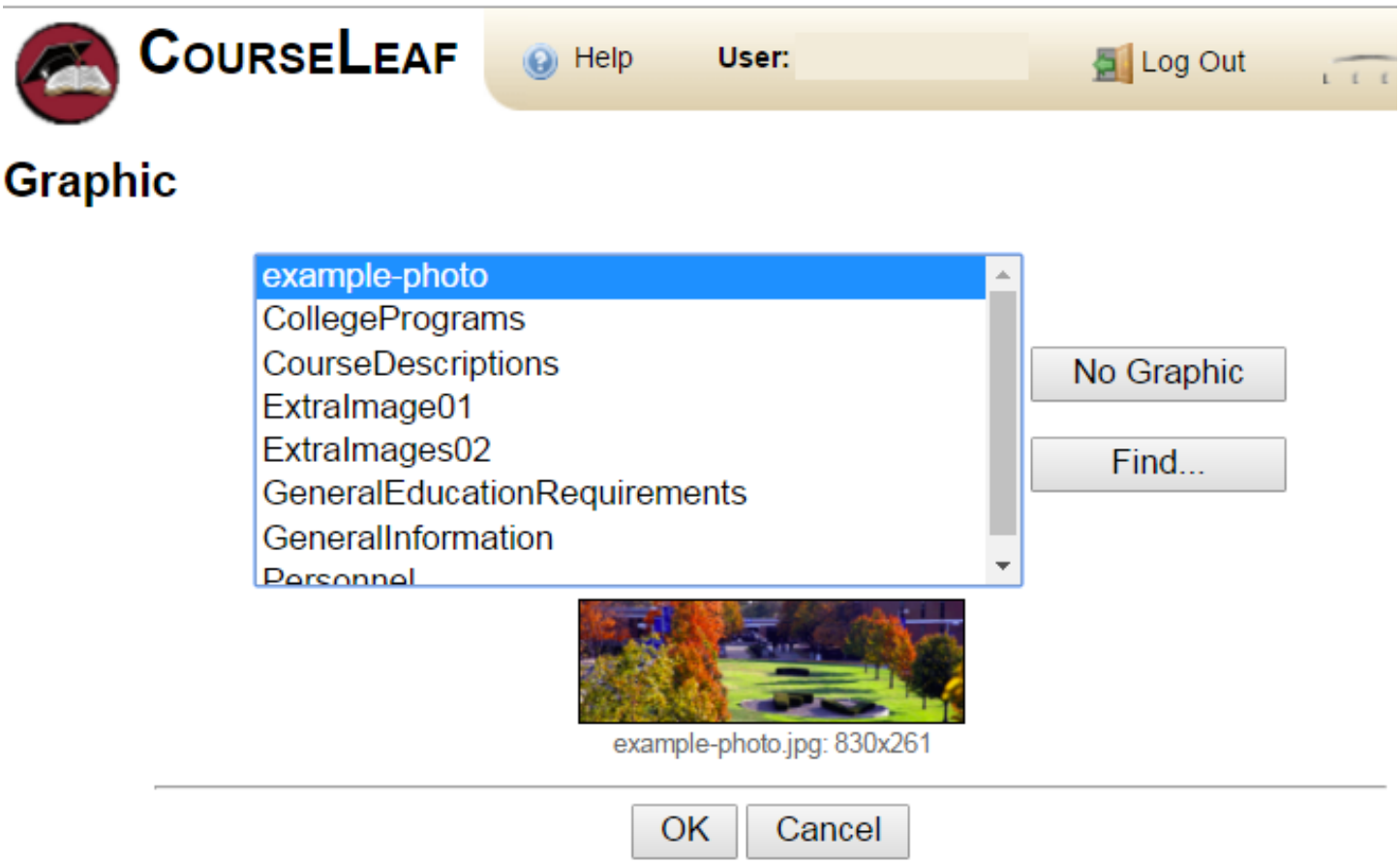
How to Delete Faculty Members

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.



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.

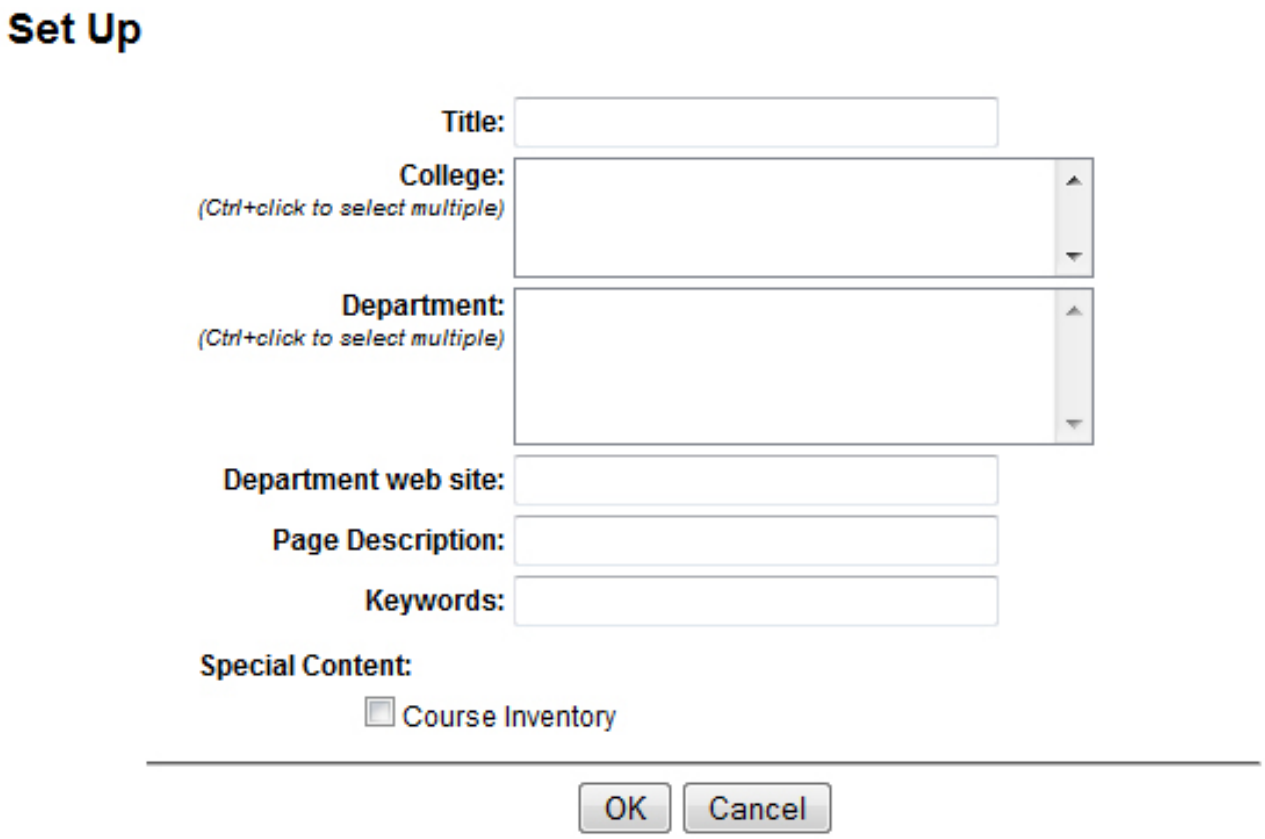
How To Add an Image to the Graphic Tool

To add an image to the Graphic Tool it must be added to the Image Library (https://help.courseleaf.com/cat/administrators/administrative-console/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.



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. 32) 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 (https://help.courseleaf.com/cat/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

Additional Resources

- CAT Release Notes (https://help.courseleaf.com/addt-resources/cat-release-notes/)
- CAT Theme Refresh and Reorg (https://help.courseleaf.com/addt-resources/refresh/)
- CIM Release Notes (https://help.courseleaf.com/addt-resources/cim-release-notes/)
- CLSS Release Notes (https://help.courseleaf.com/addt-resources/clss-release-notes/)
- Additional Training (https://help.courseleaf.com/addt-resources/add-training/)
- Frequently Asked Questions (p. 91)
- Glossary (https://help.courseleaf.com/addt-resources/glossary/)
- Help Messages (https://help.courseleaf.com/addt-resources/messages/)
- Help Videos (https://help.courseleaf.com/addt-resources/videos/)
- Known Issues (https://help.courseleaf.com/addt-resources/issues/)
- New CourseLeaf Administrators (https://help.courseleaf.com/addt-resources/new-cl-admins/)
- Support (https://help.courseleaf.com/addt-resources/support/)
- Training Guides (https://help.courseleaf.com/addt-resources/training-guides/)

Frequently Asked Questions

CourseLeaf CAT Questions

How can I change the URLs for my CAT pages?

There is no tool that enables you to change the URLs for your pages. To achieve this you will need to create new pages in the new location to get the updated URLs and then delete the old pages.

Why is my course not found?

Courses are "not found" when they do not exist in the data extract that we are getting from your student information system (SIS). There could be a few reasons for this:

1. The subject code and course number you're using may be incorrect.
   - ENG vs ENGL for English
2. The last extract from the student information system might have been run before new course data was entered into your SIS.
   - Check with your on campus CourseLeaf administrator to see when the last extract was run

A user that is next in the workflow has retired. I changed the workflow but the page/form did not go to the new user who is now next in the workflow?

The correct change to the workflow of the page was made, but the page was already in workflow. Changes made to a page's workflow will not be used until the page is either pulled out of workflow and workflow is restarted, or the workflow must also be modified on the approve page in the CourseLeaf Console using the Update Pending Workflow tool. To update the workflow of a page already in workflow:

1. Navigate to the approval page ("*/courseleaf/approve/*").
2. Select the role that currently has the page in its queue from the Role drop down.
3. Select the page from the queue.
4. Click the "Workflow Status" tab in the upper right.
5. Click the Update Pending Workflow button.
6. Reorder or remove pending steps in workflow. Please take note of the message in the update screen. If you change the first person in this pending list, an automated email notification will not be sent to that person.
7. Click OK.

Can I have another tab like "Faculty" for "Administration," etc.?

The Faculty tab on a page may be generated in a number of different ways. If the Faculty tab is generated from the Faculty List tool in the top toolbar or from an external database, another tab like it for Administration would require customization of your software. Contact your CourseLeaf administrator for more information.

If the Faculty tab is generated from a page body editor, take the following steps to create a new tab (this is an admin only function. Contact your CourseLeaf administrator to add the "Manage Tabs" tool if it does not display in the CourseLeaf toolbar.):

1. In the top toolbar, click the Manage Tabs tool.
2. Click "New Item."
3. In the Name field, enter the name of the new tab.
4. Press the tab key on your keyboard. This will auto-fill the tab id.
5. Click OK.
6. The tab will not appear on the page yet, but a new pencil icon will appear in the top toolbar with the name of the new tab. Click this pencil.
7. Enter text into the body of this new tab. Click OK. The new tab will now appear on the page.

Can I have filters on my System Snapshot?

Yes. Contact CourseLeaf Support to set the filters for the System Snapshot.

How can I add anchors and links to pages?

Links are added to a page through the Insert/Edit Link button in the Page Body Editor. To add a link, highlight the words in the Page Body Editor that you would like to show as a link. Then click on the Insert/Edit Link button and enter the URL of the page to link to in the URL text box. Some clients have the option to chose predetermined links as well.

Remember, when entering URL's, if you are linking to a page in the catalog to enter the relative path which is everything to the right of the .edu. For instance, to link to the Biology page, if the URL is *http://catalog.yourschool.edu/sciences/biology/* then you would enter */sciences/biology/* in the URL text box. If you are linking to a page outside the catalog, include the entire URL starting with *http://*.

Anchors are links within the current page. This feature is not available for all clients or may be an admin-only option. If anchors are supported, the Insert/Edit Anchor button will be visible in the toolbar. Place your cursor in the Page Body Editor where you would like the anchor to be placed, then click the Insert/Edit Anchor button. A yellow anchor will appear in the Page Body Editor, though it will not be visible on the actual page. Then highlight the words you would like to link to this anchor and click the Insert/Edit Link button. Click the radio button that says Link to an Anchor and select the anchor you created, then click OK.

How can I control what Faculty is listed on the page?

Faculty display is highly customized for each client. Some clients use the "Faculty List" tool in the top toolbar. The Faculty List tool will display groups of individuals. To edit a faculty member, click on the person's name in one of the groups, then click the pencil icon next to the person's name. Edit the fields as necessary, then click OK.

To add a new group, scroll to the bottom of the Faculty List box. In the last group box, click "Select," then select the desired group. Add members to the group by clicking the plus icon above the group box.

Many clients do not use the Faculty List tool or have a solution that is customized. Contact your CourseLeaf administrator at your institution for your school's specific situation.

How do I create a link to an external url or to an email address?

Links are added to a page through the Insert/Edit Link button in the Page Body Editor. To add a link, highlight the words in the Page Body Editor that you would like to show as a link. Then click on the Insert/Edit Link button and enter the URL of the page to link to in the URL text box. If you are linking to a page outside the catalog, include the entire URL starting with *http://*. To link to an email address, in the URL enter *mailto:* and the email address to send to. When this link is clicked the users default email program will open a new email window.

How do I create shared content?

If you have content that should appear on multiple pages, create the content on one page, then turn it into shared content. Follow these steps:

1. 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.*
2. Click the Manage Selected Content tool
3. Choose New Shared Page from the drop-down
4. Click OK
5. 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.
6. 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/.
7. 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.
8. 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 do I delete shared content?

Shared content is content that is edited in one place then displays in multiple places in the catalog. It follows its own ownership and workflow independent of the pages it displays on. To delete shared content on a page, take these steps:

1. Open the page body editor of the page or tab with the shared content to delete.
2. Click on the blue box called "Other Content" that has the shared content to delete.
3. Press the delete key on your keyboard.
4. Click OK in the page body editor to save the change.

How do I insert shared content?

Shared content is content that is edited in one place then displays in multiple places in the catalog. It follows its own ownership and workflow independent of the pages it displays on. To add shared content to a page, take these steps:

1. Open the page body editor of the page or tab you to which you wish to add the content.
2. Place your cursor where the content should go.
3. Click the "Insert/Edit Formatted Table" tool. Select "Other Content" from the drop down. Click OK.
4. Choose the name of the shared content from the dialog box. Click OK. A blue box called "Other Content" will appear in the page body editor containing the shared content.
5. Click OK in the page body editor to save it to the page.

How do I log out of CourseLeaf?

Logging out of CourseLeaf is generally accomplished by closing your browser completely (all windows). Some clients' Single Sign-On Authentication system will allow a "log out" button in the bottom toolbar of CAT, or in the main CIM or CLSS screen, but most Single Sign-On systems require the browser to be closed to complete the sign out. In short, to log out, close your browser.

How do I set-up my page with a title?

1. Navigate to the page you wish to change the title on.
2. Click the "Edit Page" icon in the upper left corner
3. Click the "Set Up" tool
4. Change the title in the Title field of the Set Up tool.
5. Click OK.

I need to add a page editor feature. Who do I talk to?

The features available differ for each client based on needs discussed when implementing CourseLeaf. If there is a feature you feel would be necessary for your task, please contact your CourseLeaf representative.

My page has weird spaces between paragraphs that I can't seem to get rid of. What do I do?

It may be by design that you have white space between paragraphs. This is a stylistic feature in the template that is used across the site. But such white space is not always desirable, for instance, when displaying an address. To make a new paragraph appear directly below the previous without white space use a "hard return" by holding down the shift key when pressing the enter key.

Consecutive empty paragraphs or hard returns will automatically be removed.

Note: this should be used sparingly, not with every return on the page. Most commonly it is used with addresses or contact information.

When I follow a link on my page I get a "Page Not Found" Error. What causes this?

This error is related to relative paths. When links to pages within the catalog are entered into CourseLeaf they must be entered as relative, not full, paths. A relative path begins with a "/" (forward slash) then the path to the page. Full paths begin with "http://" then the name of the website. It is important to use relative paths in CourseLeaf links because the domain name changes throughout the process of publishing a catalog.

CourseLeaf will automatically correct full path URLs to relative path URLs when linking within the next site. (I.e., if the URL *http://next.myschool.edu/messagefrompres/hello/* is entered on the site *http://next.myschool.edu*, CourseLeaf will automatically remove the *http://next.myschool.edu* from the link, leaving */messagefrompres/hello/*). It will not correct the full path to a relative path if it has been taken from the live site or the current environment.

When do I need to Republish the site?

You can republish the site at anytime to refresh all pages. This would be when you expect to see changes not made with the tools in the CourseLeaf toolbar. For example, it is necessary to republish the site after a new course import so that the pages will reflect the new data. Republishing the site will also produce a report of all red boxes (for courses not found) on the site with the corresponding page they can be found on.

You may wish to republish only part of the catalog. To do this, use the Republish Subdirectory tool in the Catalog Console. For example, if you only want to refresh the Undergraduate pages, enter "/undergraduate" to republish this subdirectory.

When should I use numbered lists versus bulleted lists?

Unordered (or bulleted) lists will automatically append a bullet to each item in a list. In contrast, ordered lists will append incrementing numbers, letters or roman numerals. While each should be used to achieve the desired behavior, it's important to allow the browser to assign the numbers or bullets accordingly, rather than trying to type a number or character to represent a bullet. Browsers and other web-enabled applications rely on the proper usage of these lists to convey the correct meaning of the content.

Why are all of my workflow emails going to one person?

Check the Workflow Emails tool on your console to see if there is an email address in the Test Address field. This field should only be filled in when testing workflow. When there is an email address in this field, all workflow emails will be routed to this address.

Why are there red boxes around courses?

A red box indicates that the information in the red box is not found in the course data extracted from the Student Information System. This may indicate that you have entered in the course code incorrectly. It may also indicate that the SIS has not been extracted recently to show new course information. If you have red boxes around a number of courses, this could indicate that there is something that needs attention with the SIS or CourseLeaf system. If you believe that the course information in the red box is correct, please contact your CourseLeaf Administrator. It is important to fix all red boxes before publishing.

Why are there red boxes around hours?

If there is a red box around course hours, it indicates that the hours listed do not match what is in the course database. By mousing over the red box, a pop-up will display how many hours the source has it listed for. If you are certain that the course needs x amount of hours, then simply leave it. This is only a warning. The catalog can still be published with red boxes around the hours and the red boxes will not appear in the published catalog.

Why can't I change the font in the page body? Why are there so many different fonts on my page?

The font has been pre-determined for the catalog, therefore there is no need to choose a font. The various fonts and sizes that appear on a page most likely come from the Headings on the page. Headings are set by the Paragraph Format tool (a drop down that usually says "Normal").

To change text to a heading, click anywhere in the text, then select the Heading from the Paragraph Format tool drop down. Notice, the entire paragraph of text will change to that heading.

In some cases, font size and color may be set by the Styles drop down. Styles may format an entire paragraph (paragraph level styles) or just particular words (inline styles). Each institution uses styles differently. See your CourseLeaf administrator for information about what styles, if any, your institution uses.

To change the style of text, highlight the text you wish to style, then select the style from the Styles drop down.

Why do I see an "XHTML error" in the page body when I close the Page Body editor?

Usually this error means that the Page Body contains formatting that is not allowed or a special character that is unsupported. To troubleshoot, take these steps:

1. Open the page body editor for each tab and click "OK" to resave the information to the page.
2. Remove content from the page body editor incrementally and click OK to save. Check if the error is resolved after each save. When it is resolved, add information back to the page body editor manually.
3. In the page body editor, click the Select All button from the toolbar and open a text editor like Notepad (do not use Microsoft Word for this step). Paste into the text editor and look for empty boxes where you expected a character to appear. This will most likely be the character causing the error. Find that character in the Page Body editor (it may appear as something other than an empty box) and delete or replace it. Then click okay and check the page. Continue these steps until you reach the end of the document or the XHTML error disappears.

How can I check that all of my links are working?

Once you select okay after editing, you can verify the link is working correctly by clicking the link on the page.

In addition, prior to publishing, CourseLeaf runs a link checker for the entire site. A report will be generated and sent to the admin team with all broken links.

How can I set 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 theInsert/Edit Link to an Anchor option, select the desired anchor from the drop down list, and click OK

How do I add a footnote?

Please see Footnotes (p. 26) in the help documentation

Can I include a Google powered search for my catalog?

Please see the Search (https://help.courseleaf.com/cat/administrators/search/) page for more information.

How do I add a page to navigation?

In order to add a page to navigation, the page must first exist. Please visit our help documentation for information about creating a page (https://help.courseleaf.com/cat/administrators/administrative-console/create-page/).

Once the page has been created, and you wish to add it to the navigation bar, you can follow the steps illustrated in our help documentation on editing navigation (https://help.courseleaf.com/cat/administrators/edit-navigation/).

How do I add headers in a course list?

In order to add headers whilst creating a Course List, add a Comment Entry by clicking 'Add Comment Entry' in the bottom left-hand corner of the Course List Table Editor.

Type the Header you would like to create. You will now see your comment in the list on the right-hand side. Use the Move Up and Move Down buttons to place the comment in the appropriate location of the table you are creating. You can then select the 'Area Header' check box. This will embolden the comment, making it appear in your table as a header inside your course list.

Please visit our help documentation for more information about Course List creation (p. 21).

Can I cut/copy and paste tables from a Microsoft Word document or elsewhere? From inside Page Body Editor?

CourseLeaf has a selection of formatted and pre-defined tables built into the page body editor for your use. Using these will help keep all views of the catalog standard in terms of formatting, i.e., the PDF, published online catalog and mobile views. If there is a table that you need, but is not yet added to CourseLeaf, contact CourseLeaf Support. Please be detailed as to the specifications of the table desired. An attempt to paste a table into the Page Body Editor will trigger a warning box noting that tables have been removed.

However, if you desire to move a preexisting table, you may cut/copy and paste that table within Page Body Editor. You may also cut/copy a table from one Page Body Editor and paste it within another Page Body Editor within your url.

Can CourseLeaf talk to our Student Information System (Banner, PeopleSoft)?

CourseLeaf works with your Student Information System (SIS) in a number of different ways. In the Catalog, all course data (course bubble information, course titles, course indexes) come from a periodic extract of the SIS. This extract is performed by an administrator through the Course Import function (https://help.courseleaf.com/cat/administrators/administrative-console/courseimport/). Because the catalog only displays courses relevant to a particular time, the Catalog requires a static feed of data from the SIS.

CourseLeaf CIM Course Administration receives a nightly extract of the SIS. CIM checks to make sure it is in sync with the SIS when beginning to edit a course and when the approval workflow is complete. For more information about the data sync with CIM, see CIM Data Sync (https://help.courseleaf.com/cim/administrators/datasync/).

CourseLeaf WEN also receives a nightly extract of the SIS. It uses this extract to keep offering information in sync for future terms. The WEN data sync is only used internally and requires no interaction by users.

How do I add links to the navigation when there are no links in that level?

To add links to the navigation, first the page has to be created (see Create Page (https://help.courseleaf.com/cat/administrators/administrative-console/create-page/)). To force the navigation to refresh with the new page, do the following:

1. Navigate to the Catalog Console (*/courseleaf/*)
2. Click the "Rebuild PageDb" button. Wait for it to complete.
3. Click the "Republish Subdirectory" button.
4. In the URL field, enter "/navbar/". Click OK.
5. Return to the newly created page to ensure the navigation appears.

Alternatively, do the following:

1. Navigate to the parent page of new page.
2. Click the Edit Navbar tool (pencil icon above the navigation).
3. Hover over the area that has the parent page link to highlight it. Click on this area.
4. Click Apply.
5. Return to the newly created page to ensure the navigation appears.

See Edit Navigation (https://help.courseleaf.com/cat/administrators/edit-navigation/) for a thorough description of this process.

Can we do a faculty import?

CourseLeaf institutions select from a suite of faculty management solutions. If your institution utilizes a faculty import, you may import updated faculty information in 3 steps:

1. Send a new faculty file via SFTP, or through the Banner Transfer Package Utility
2. Select **Faculty Import** under CAT on your CourseLeaf Console
3. Select **Refresh System** under Administration on the CourseLeaf console to ensure updated faculty is displaying as expected

How do I create a PDF of the whole site for print?

Currently PDFs of the entire site are created by Leepfrog per contract agreement. PDFs of individual pages may be generated by clicking the "View as PDF" tool in the CourseLeaf Top Toolbar. Contact your site administrator for more information about PDF creation.

Why does my page look different in Firefox than in Internet Explorer?

Each browser handles certain features in different ways. CourseLeaf is supported in the most current Firefox, Internet Explorer, Chrome, and Safari. When noting a problem with CourseLeaf to your CourseLeaf administrator, please note the browser in use.

What is the Republish report good for?

Once the republish has completed, specific information about your catalog site will be displayed:

1. Number of pages processed
   - Shows how many pages have been republished
2. Last page processed
   - Gives the URL to the last page that was republished
3. Messages/Warnings
   - These spaces provide any additional information about the pages that were processed. For example, under the warnings heading it may show you a report of "Course Not Found" errors, or courses with invalid hours/credits.
   - If you have any ATJ errors under Messages: please send a screenshot or copy and past the error message into an email to CourseLeaf Support.

How do I create tabs other than a courses tab?

There are two ways to create a new tab. The first option is to click on the "Manage Tabs" tab in the CourseLeaf Toolbar. Click on the New Item buttom. In the "Section Name" field, enter a name for the new tab. Press the tab button on the keyboard and an ID will automatically be created. Type and Program Code may be left as default. Click OK. The tab will not yet appear on the page because the tab has no text. But the name of the new tab will appear in the CourseLeaf Toolbar with a pencil icon. Click on this pencil icon to open the Text Editor for that tab which works just like the Page Body Editor. After you've entered all of the information for the tab, click OK and the tab will appear on the page. Another tab called "Overview" is also created which holds the content of the page before adding the tab.

The other way to add a tab is to select some text from the Page Body Editor that you wish to be moved to another tab. Click the Manage Selected Content button in the toolbar. In the Manage Selected Content dialog box that appears select New Tab from the Select Destination Content Type drop-down list and click OK. In the next dialog box, give the tab a name. The selected text will disappear from the Page Body editor and be placed in a new tab.

How do I use the Image Library?

Please refer to the Image Library (https://help.courseleaf.com/cat/administrators/administrative-console/image-library/) page of the help site.

How do I prune the site map? How do I add to the site map?

Please refer to Site Map (https://help.courseleaf.com/cat/administrators/sitemap/).

How do I know we're ready to "go live?"

To go live ALL pages must be approved, that is, everything in "green" in the System Snapshot. Then, once 100% of the pages are "Done", click on "Republish Site" in the Catalog Console. This will generate a report of the entire site, any last errors or any courses not found. The best practice is that we do not go live until all errors are resolved.

Once errors are resolved, contact your Support Specialist to publish your catalog. Note, contact support at least 2 weeks before you plan to publish.

I accidentally deleted a page, can you restore?

After deleting a page, there is no way for you to restore the page yourself. However, if you contact your support representative, they may be able to help you.

How do I update our logo or template?

Web templates may be refreshed on a yearly basis as a part of an institution's support contract. Contact your Support Specialist to begin template update conversations.

How do I have a structured content table created?

End users should contact their on-campus CourseLeaf administrator. Admins should then contact support. Please include the number of columns needed, the title of each column, whether there should be headers included in the table, and any other formatting specifics. You do not need to include the data of the table.

How do I re-name a department or college in the CAT Setup Tool?

The Setup tool data is driven from a database that is updated by your CourseLeaf support person.

What are the best practices for rolling over a new edition and archiving the current site?

An archive is performed once per catalog edition. CourseLeaf recommends archiving once your published content is static. We recommend waiting a couple of weeks after the initial catalog publish to allow time for any last minute updates, or typo corrections before archiving.

Once you are ready to archive your catalog, contact your Support Specialist.

How do I update my course list to say "units" instead of "hours" or "credits"?

The label for units in a course list is set globally for all pages in the catalog. Contact your on campus CourseLeaf administrator to discuss the label. If you are an administrator, this global change may be made by contacting your CourseLeaf support team.

How can I add an Index of all Majors, Minors, Courses, etc.?

If you do not currently have an A-Z index and would like to add one, contact your Support Specialist.

How do I insert a CIM program into the page body?

To insert a CIM program into the CAT page body editor, please see the Placing CIM Programs in CAT page (p. 55) of the Help Documentation.

Can I give people read-only access to CAT?

All institutions with view level access (must log in to view) must list all users in User Provisioning. You may set which users have edit access by assigning them roles in Role Management or assigning them to a page. If a user is in User Provisioning, but is not listed within an 'editing role', that user only has view access (read-only).

All institutions with edit level access (must log in to edit) by definition have given read-only access to all people because authentication is not handled until the user begins to edit.

Why are there no hours showing for a comment or course? How do I hide the hours for a comment or course?

Hours are shown in a Course List or Plan of Study Grid when there is an entry in the Hours field or when a course is not indented. These hours can be hidden by selecting the "indent" checkbox at the bottom of the Course List or Plan of Study Grid Editor. Conversely, if hours are not showing, make sure the course is not indented. Courses automatically insert hours from the student information system; comments will need to have this field entered manually.

I deleted a shared content page, why is it still showing up in the page body?

The shared content page will continue to appear in the page that holds that shared content until the page is rebuilt, either with Republish Site, Republish Subdirectory, Refresh System, or when any OK button is clicked from a tool in the top toolbar.

How do I create a courses tab?

To create a Courses tab, select the Manage Tabs tool from your top toolbar. Create a new tab named Courses. For more detailed instructions on tab creation, see Manage Tabs (https://help.courseleaf.com/cat/administrators/managetabs/).

Once you have created the tab, select the pencil icon next to Courses. Use the Insert/ Edit Formatted Table tool to insert a Course Descriptions (Per Subject). For more detailed information on how to add course descriptions to a page, see Course Descriptions (p. 20).

How do I make a user an administrator?

Administrative access is granted on the CourseLeaf Console in the Account Management screen. See Account Management (https://help.courseleaf.com/general/console/account-management/) for more detailed directions.

How can I control what content is in the emails that are sent?

Please refer to Workflow Emails (https://help.courseleaf.com/general/console/workflowemails/).

How do I add or remove users and create groups?

To add and delete users, refer to User Provisioning (https://help.courseleaf.com/general/console/user-provisioning/). To create a group, CourseLeaf uses a role, such as Curriculum Committee. Multiple users can be added to any role, therefore creating a 'group.' For more information regarding roles/groups, refer to Role Management (https://help.courseleaf.com/general/console/role-management/).

Is there a web-demo for CourseLeaf?

If you would like an overview of CourseLeaf modules which your institution has purchased, take a look at the videos section (https://help.courseleaf.com/addt-resources/videos/).

If you are looking for a demo of a module which your institution has yet to purchase, contact your Account Executive.

What happens when I click on Course Import in the Console?

The Course Import button brings data from your Student Information System into CourseLeaf. Data is received from your SIS either via SFTP or through a Transfer Package. In either case, after running the Course Import, the Republish Site or Republish Subdirectory tool must be run next to feed that new course data to the pages. See Course Import (https://help.courseleaf.com/cat/administrators/administrative-console/courseimport/) for more information.

The table on my page looks funny. It's too wide, etc. What should I do?

Tables are formatted during the design phase of setting up CourseLeaf. Occasionally tables may be added that don't fit the formatting of a pre-designed table. When this is the case, contact your CourseLeaf admin to ensure that there is not an appropriate table that might be used instead. If no table can be used that is sufficient, the CourseLeaf admin may opt to contact customer support.

How can I move pages in navigation?

Copy the URL of the page you wish to move starting with the slash (/) after the .edu. Then navigate to a page that displays in the NavBar where you would like to move the page. Click the pencil icon on the NavBar then click the section of the navigation where you would like to move the page. The Edit Navigation dialog box will appear listing all of the pages on that level. Click the radio button for Manual by List control then click "New Link". Paste the URL of the page to move in the URL field. Enter a name for the new link that will appear in the NavBar. Click "Apply" to save the change.

How do I list sequenced courses in "or" classes in a course list?

In the Or field of the course list, enter the sequenced courses separated by an "&". For instance to show MATH 101 OR MATH 102 & MATH 103, choose MATH 101 from the list, in the Or field enter "MATH 102 & MATH 103".

What is the difference between republishing the site versus republishing a directory?

Republishing the site will republish every page in your site. Republish Subdirectory will only republish the pages in that subdirectory. Also, Republish Subdirectory can be used to republish /programadmin to get a report of all "Courses Not Found" in CIM Programs.

How can I edit text in the course bubbles?

Course bubbles are not edited in CourseLeaf Catalog itself. Rather, any text within a course bubble directly comes from the course import source (Ex: Banner, PeopleSoft, etc.).

Update the course's information in the course import source, then contact your on campus admin to move the updated course information into the catalog.

How do I add navigation to a page?

When creating a new page, the final step is to edit the navigation. Go to a page with the navigation open to the section you want to add to. Click Edit Page, then click the pencil icon above the navigation. Click the section your new page will belong in and add it to the navigation (see Editing Navigation). Click Apply then return to your new page. The navigation should now appear.

How do I skip ahead or roll-back changes?

Workflow is linear, so there is no way to 'skip ahead' inside workflow. If there is a need for a step in workflow to be removed, however, an administrator can make that change using 'Update Pending Workflow (p. 40)' on the Approve Pages (https://help.courseleaf.com/general/console/approve-pages/) Screen.

When rolling back a proposal, page, or schedule, it is important to note that you are only rolling back ownership (giving editing control back to someone). You are not reverting changes. In CIM, there is a Shred Proposal button, which will remove anything that the proposal was proposing (like actually taking the proposal and placing it in the shredder). However, there is no 'Shred' for CAT pages or CLSS schedules.

Can I have a course list inside a list?

No, but you can use area headers to segment a course list. To add an area header to a course list, take the following steps:

1. double click the blue box to open the course list editor
2. click "Add Comment Entry".
3. Enter in the text for the area header in the comment entry dialog box. Click OK.
4. Check the "Area Header" checkbox located at the bottom right of the editor.
5. Click OK to save.

I'm getting an error that my shared page has not been approve yet, using unapproved version. What does this mean?

Pages using shared content will try to use the approved version of the shared content. Shared content is treated like any page in CourseLeaf, which includes Workflow. Shared content that has never been through the workflow process will generate this reminder message when the site is republished. Shared content is approved just as other pages are approved, through the Page Approval window in the Catalog Console. For more information about approving pages see Approve Pages (https://help.courseleaf.com/general/console/approve-pages/).

How do I build a course list or plan grid?

To build one of these formatted tables, click in the Page Body editor where you would like the table to be placed then click the Insert/Edit Formatted Table button. In the dialog box that appears, select the kind of table to use then click okay. In the box that follows, select the courses that should appear in the table and fill in all pertinent fields. Click OK to place the table in the Page Body Editor. To edit the table, double-click the blue box around the table. For a thorough discussion of creating course lists or plan grids see Course Lists (p. 21) or Plan of Study Grids (p. 29).