CourseLeaf

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Getting Started

CourseLeaf Login

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 (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar) if the user is currently logged in. When the user logs in to CourseLeaf, he/she will be able to begin to create, update, and manage the academic catalog or bulletin.

The default Edit Page icon. This will appear in the top left corner of your screen.

How to Log into CourseLeaf

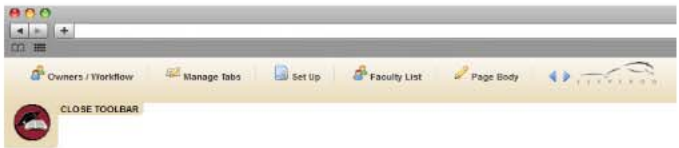
1. In order to log in, select "Edit Page" on the top left corner of the screen to prompt a log in window to appear.
2. An existing single-sign on (SSO) log in name and password can be used to log into CourseLeaf. Simply use the same name and password whenever asked to log in for specific reasons, such as "Editing the Page Body."

The CourseLeaf Toolbar

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

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

The Top CourseLeaf Toolbar



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

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

- Owners & Workflow (https://help.courseleaf.com/getting-started/courseleaf-toolbar/owners-workflow) (Administrator Function)
- Manage Tabs (https://help.courseleaf.com/getting-started/courseleaf-toolbar/managetabs) (Administrator Function)
- Setup / Title (https://help.courseleaf.com/getting-started/courseleaf-toolbar/site-title)
- Faculty List (https://help.courseleaf.com/getting-started/courseleaf-toolbar/facultylist)
- Page Body (See Editors > Page Body) (p. 6)
- Accuracy Report (p. 2)
- Show Differences (p. 3)
- View as PDF (p. 3)

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

The Bottom CourseLeaf Toolbar

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

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

Accuracy Report

"Accuracy Report" can be found across the top CourseLeaf toolbar to review a page and show any errors that are present on the page. If there is nothing to be found, the validation results will simply say: No Errors Found. An error would include a red box around a course not found, or potentially a red box around credit hours that do not total accurately. A red box would appear around a course that is not found in the SIS because it is no longer being offered, the course code was not entered in correctly, or an updated course import into the system may need to be run.

To test if a course import is necessary, enter a made up course into the page body editor as an inline course, and saving the course not found to the page. By selecting "Accuracy Report" on the specific page, the course not found will show up as a result. (For instructions on how to create an inline course, please visit Inline Courses (p. 17)). *Note: To get a list of errors for the entire catalog, an admin would have to select "Republish Site" on the Catalog Console.*

Example of an "Accuracy Report" with no errors found.

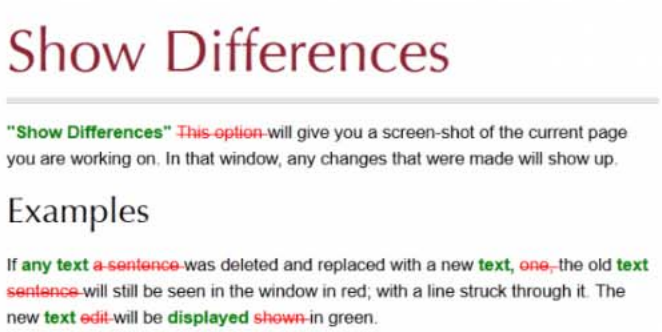
How to Run an Accuracy Report

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar.
2. Select the "Accuracy Report" tab from the CourseLeaf toolbar located across the top of the screen.
3. Results will be automatically generated.
4. Select "Close Window" to leave the report.

Note: The Accuracy Report does not check any shared content or programs managed in CIM since that content is managed externally.

Show Differences

"Show Differences" will present a screen-shot of the current page the user is working on. In that window, any changes that were made will show up.



Example of a Show Differences page.

How to Show Differences

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar.
2. Select the "Show Differences" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt a new window to open showing any differences that were made.
3. If any text was deleted and replaced with new text, the old text will still be visible in red with a line struck through it. The new text will be displayed in green.
4. To return to the previous screen, simply X out of the "Show Differences" window.

View as PDF

"View as PDF" allows a user(s) to see the current page as a PDF file in a new window. However, a user cannot make any changes in the PDF mode; rather a user must do that in the Page Body. Users should view the page as a PDF before submitting to the next phase in workflow. This will allow a user to make note of any issues on the page as well as the PDF.

How to View as PDF

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar.
2. Select the "View as PDF" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt a PDF version of the page to open which a user can then view, print, or save.

Benefits

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

Approvers

An Approver is a user who has the capability to edit, rollback (to previous role), or approve a page (so it proceeds to the next step/role in the workflow). Please click the link listed below for more information about the "Approve Pages" function:

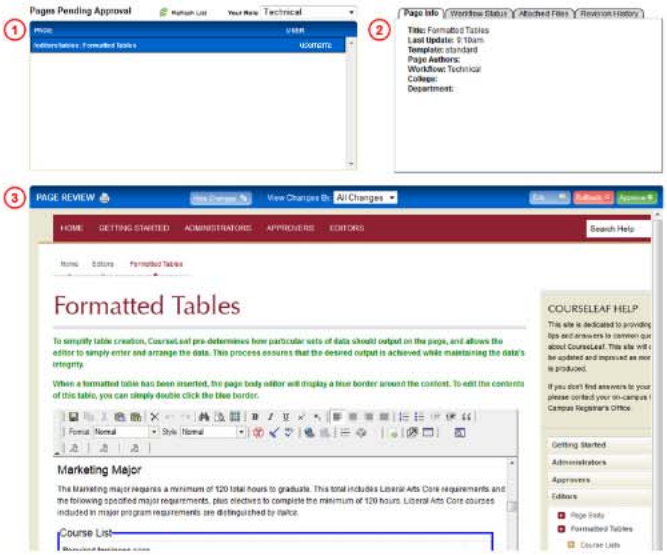
• Page Approval (p. 4)

Approve Pages

"Approve Pages" is a feature that gives the administrator or approvers the capability to edit, rollback (to previous role), or approve a page (so it proceeds to the next step/role in the workflow).

The Page Approval window is divided into three main sections:

1. **The Pages Pending Approval list (upper left):** Use this list to select the page desired to review. The page selected will appear in the Page Review window. Click the "Your Role" drop down to select the role you wish to view. When a role is selected, the "Pages Pending Approval" list will be populated with pages that require review, editing, or approval from the selected role. Click "Refresh List" to see if new pages have been added since last visited or if the list doesn't contain an expected page.
2. **The Page Info/Status window (upper right):** Review basic page information and the workflow status of the selected page here. Click the various tabs to view different reports. Click Workflow Status to review and update workflow progress (*See further instruction below*).
3. **The Page Review Window (bottom):** Review the selected page here, then approve it, edit it, or send it back to a previous editor in the workflow. Review changes made by various editors in the workflow by clicking the "View Changes By" drop down and selecting the editor to review.



The page approval window, showing a page that has been revised.

How to Acces the Page Approval Window

1. Navigate to the Catalog Console (futurecatalog.url.edu/courseleaf) or follow the "Page Approval" link from an automated email.
2. Under "Administration", in the left hand navigation, click "Approve Pages" to navigate to the "Page Approval" window.
3. Click the **Your Role** drop down at the top of the page and select the account for which to review and approve pages, if not selected by default. This will populate the Pages Pending Approval list with pages assigned to that role. *Note: Click Refresh List to see if new pages have been added since your last visit or if the list doesn't contain an expected page.*

How to Review a Page / Edit, Roll Back, Approve a Page

1. Scroll through the Pages Pending Approval list and select the page to edit. When a page is selected, the reports and workflow status window and the Page Review window will be populated with information.
2. Review content in the Page Review area.
   - **View changes made by prior editors:** Click the "View Changes" by drop down menu and select an editor whose changes you wish to review.
   - The selected editor's changes are shown in red and green. Red for deleted text, green for new text.
   - Remember that there can be any number of page editors in a workflow. Each editor reviews or edits content sent to them for the editor directly before them in the queue. The changes seen here are changes the selected author made compared to the document they received.
   - **Hide Changes:** to view the document as it is without color coding or markup, click "Hide Changes".
3. Choose an action on the page. One of four actions may be taken after reviewing the page. edit, roll back, or approve the page. Buttons for these are located in the upper right of the Page Review window. The page may also be left alone and returned to later.
   - **Edit the page:** Click "Edit" to make changes to the page. This will produce a tool bar at the top of the Page Review window. Visit the Page Body or Set Up/Title instructions for how to make the desired edits. After editing the page approve the page to send it to the next step in the workflow.
   - **Roll back the page:** Click "Roll Back" to send the page back to a previous editor. A prompt will appear to make comments about why the page is being rolled back for re-edits. Make comments in the space provided and click "Roll Back" in the new window.
   - **Approve:** Click "Approve" to send the page on to the next step in the workflow.
   - **Leave the page for another time:** The page may be left for another time. Select another page to review, or click "Logout".

How to Update Pending Workflow (Ad Hoc Workflow)

Default "Update Pending Workflow" button in Workflow Status tab listed next to the Page Info/Status window (upper right).

1. Select the "Workflow Status" tab on the Page Info window on the upper right side of the screen.
2. Select "Update Pending Workflow" in order to allow workflow to be updated for this approval cycle only.
3. Update workflow as desired.
4. Click "OK".

Note: Update Pending Workflow is an administrator only feature.

Helpful Tips:

- Be sure to "Approve" when finished so page(s) advance through the Workflow process.
- All changes are visible by default. Use "hide changes" option to view only the final text.
  - Changes also viewable by author if desired
- Do not copy/paste tables into catalogs or blue boxes.
- Use "broom tool" if text is copy/pasted from Microsoft Word.

Editors

An Editor of a catalog acts as the team leader for the migration team and is responsible for getting the catalog migrated into Courseleaf on a timely schedule and with high quality. An Editor represents the client in this process as well as Leepfrog to ensure that the intent of the client is implemented in the final catalog. This person resolves issues as best they can or raises questions to the management team or the client for clarification. For more information about tools that an Editor will use click on the links below:

- Page Body (p. 6)
- Course Lists (p. 13)

Page Body

"Page Body" tends to be the center of activity for a page. It's here where most of the text, images, and structured content can be added or edited. The "Page Body" tool works like a standard word processor tool.

The default Page Body Editor

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.
   Note: There may be additional tabs in the CourseLeaf toolbar with a icon, for example "Major" or "Minor", representing different areas of the page that can be edited. Any item in the CourseLeaf toolbar with a icon is a Page Body editor for a different part of the page.
3. Begin typing text or select one of the following tools to work with:

Cut, Copy, Paste, Delete

- Copy selected text (Ctrl+c) (p. 7)
- Cut selected text to paste elsewhere (Ctrl+x) (p. 7)
- Paste copied or cut text (Ctrl+v) (p. 7)
- Paste as plain text, removing original formatting (p. 7)
- Delete selected text (p. 7)

Undo / Redo

- Undo last content block (Ctrl+z) (p. 7)
- Redo last last removed block (Ctrl+y) (p. 7)

Find, Replace, Reveal

- Find / Replace a phrase (Ctrl+f) (p. 7)
- Reveal content blocks (p. 7)
- Highlight all (Ctrl+a) (p. 7)

Format Text

- Bold (Ctrl+b) (p. 8)
- Subscript text (p. 8)
- Underline (Ctrl+u) (p. 8)
- Superscript text (p. 8)
- Italicize (Ctrl+u (p. 8))
- Align left (Ctrl+l) (p. 8)
- Align right (Ctrl+r) (p. 8)
- Center (Ctrl+e) (p. 8)
- Justify (p. 8)
- Numbered list (p. 8)
- Bulleted list (p. 8)
- Block quote (p. 8)
- Increase Indent (p. 8)
- Decrease Indent (p. 8)
- Define text format - Header, paragraph, etc. (p. 8)
- Define text style (p. 8)

Insert/Edit Images

- Insert/Edit images (p. 8)

Check Spelling and Clean Up Formatting

- Remove formatting (p. 9)
- Clean html (p. 9)
- Check spelling (p. 9)

Manage Links

- Create a link (p. 10)
- Insert an anchor link (p. 10)
- Remove a link (p. 10)

Special Characters and Page Breaks

- Insert a horizontal line (p. 11)
- Add a special character (p. 11)

Insert/Edit Database Field

- Insert/Edit Database Field (Inline Course) (p. 11)

Edit HTML

- Edit HTML (p. 12)

Insert/Edit Formatted Tables

- Insert/Edit a Formatted Table (p. 12)

Context Menu

Produce a quick and convenient menu bar to modify page body elements, such as images, links, and tables.

- Right click the element desired to modify: image, link, table, paragraph, etc. This will produce a menu with options specific to the chosen element

- Choose the option desired to modify or the action to take. Depending on the element a user is editing and the option they have selected, they may be presented with a final list of options to choose from.

Note: Ctrl+Right Click produces a context menu with browser commands. For example: back, forward, reload, etc.

Cut, Copy, Paste, Delete

- 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
- Delete selected text

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Copy and Paste Text from Another Source

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

1. Copy (Ctrl+c) the text from the desired document, then position the cursor in the "Page Body"
2. Click the "Paste" button or paste (Ctrl+V) the text into the new window provided.
3. Highlight the pasted text, and click the "Clean HTML" button. This cleans the conflicting formatting commands carried over from the word processor.
4. Click "OK".

Sometimes a user may wish to paste text without carrying over the formatting from the word processor. To do so, click the "Paste as Plain Text" button.

Note: If a page is published and the new text still doesn't look right, a user can go back to the Page Body section, highlight the problem text and click the Remove Formatting button. Then re-format the text as desired.

Copy and Paste Text with the Context Menu

This function only works with Internet Explorer.

1. Highlight the desired text to copy.
2. Left click the highlighted text.
3. Select "Copy".
4. Left click the area where to past the text.
5. Select "Paste".

Helpful Tips:

Do not copy and paste blue boxes that surrounds any specified content. *(Example: Course lists, plan of study grid, etc.)*. Rather, insert those elements with the appropriate button in the Page Body toolbar.

Undo & Redo

- Undo last editing action (Ctrl+z)
- Redo last edition action (Ctrl+y)

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Undo & Redo Changes

1. To remove the last action, click the "Undo" button (Ctrl+z).
2. Click the "Redo" button (Ctrl+y) to restore the last removed action.

Find, Replace, Reveal

- Find / Replace a phrase (Ctrl+f)
- Reveal content blocks
- Highlight all (Ctrl+a)

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Find Text

1. Click the "Find/Replace" button (Ctrl+f).
2. Type the desired word to search for into the **Find What** field. If the search should be case sensitive, or if the intention is for the user to find only perfect matches, check the appropriate boxes below the **Find What** field.
3. Click "Find".

Replace Text

1. Click the "Find/Replace" button (Ctrl+f).
2. Select the "Replace" tab.
3. Type the desired word to replace into the **Find What** field.
4. Type the replacement word into the **Replace** field. If the search needs to be case sensitive or if the intention is for the user to find only perfect matches, check the appropriate boxes below the Replace with field.

5. 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.

Show Block / Reveal Formatting

Click the "Show Blocks" button to reveal the formatting tags being applied to the page text. This can be helpful in troubleshooting. Pay close attention to empty blocks which may cause odd spacing.

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

Select All

Click the "Select All" button (Ctrl+a) to highlight everything on the screen.

Format Text

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

- Bold (Ctrl+b)
- Italicize (Ctrl+u)
- Underline (Ctrl+u)
- Superscript text
- Subscript text

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Remove Formatting

1. Click the "Remove Formatting" button to clear any formatting from the selected text.
2. Re-format the text as desired.

Select Text Styles

The **Format** and **Style** dropdown menus will apply pre-set formatting conventions to selected text.

- Define text format - Header, paragraph, etc.
- Define text style

Define text format - Header, paragraph, etc.

This formats an entire block of text, such as a full line or a full paragraph. It cannot be used to format just a few words within a block (use the style drop-down for this kind of formatting). To get a better idea of what's contained in a block of text, click the "Show Blocks" button. Each block of text will be grouped within a gray box.

Each block of text can have only one format.

1. Position the cursor in the block of text to be formatted
2. Click the **Format** drop-down menu, and select the desired option. Formatting options are customized for a user's organization in advance.
3. Repeat this process to change a block's formatting.

Define text style

This assigns inline styles. It is used to format a specific set of words or text within a block.

Highlight the text desired to format, click the **Style** drop down and select the desired style. The style selected for the highlighted text will have an arrow next to it.

A user may select multiple styles for the same highlighted text.

Remove styles From Text: To remove all styles, highlight the text again and click the "Remove Format" button.

To remove an individual style, highlight the text, click the drop down and select a style with an arrow next to it. When the arrow is gone, the text is no longer assigned to that style. Unstyled text will display "Normal" in the style menu.

Establish Layout

To format the text layout, highlight the text desired to be modified and use the following buttons:

- Align left (Ctrl+l)
- Align right (Ctrl+r)
- Center (Ctrl+e)
- Justify
- Numbered list
- Bulleted list
- Block quote
- Increase Indent
- Decrease Indent

Making 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.

Insert & Edit Images

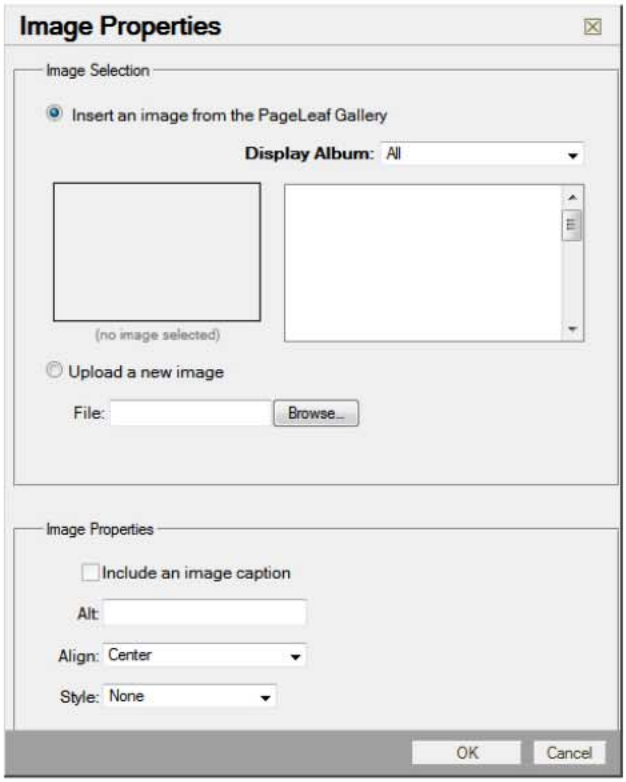
- Insert/Edit images

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).

2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Add an Image

1. With the "Page Body" window open, position the cursor where the image should be added.
2. Click the "Add Image" button.
3. Select the desired image. There are three options:
   - Use a Library Image: Click the **Display Album** pull down menu and select an album to narrow the selection of library of images. Select the image in the list below **Display Album**.
   - Upload a New Image: Click "Browse" and find the desired image file on the local computer. The file path will appear in the **File** field.
   - Use a previously uploaded file: This option is only available if an image has been uploaded to this page. Click the "Use Previously Uploaded File Radio" button and select the desired image file from the adjacent list.
4. Set Image Properties. Create an Alt tag for the image and set image alignment and style.
   - Create an alt tag: Type a brief description of the image into the box labeled **Alt.** This text is used for blind and vision impaired accessibility.
   - Select the Alignment: Click the pull down menu labeled **Align** and select the desired alignment:
     - Center: Center the image. Text will not wrap around it.
     - Inline: Position the image on the same line as the text.
     - Float left: Position the image on the left.
     - Float right: Position the image on the right.
   - Select the image style: Click the pull down menu labeled **Style** and select the desired style for this image.
   - Include an image caption: This option is only available if the image is floated left or right. Check the Include an image caption box. When a user clicks "OK" and return to the "Page Body" editor screen, they type the caption below the image where it says "Type Caption Here." *Note: The border around the image disappears when the page content is saved.*
5. Click "OK."
6. 

The default Image Properties interface

Check Spelling & Clean Up Formatting

- Remove formatting
- Clean html
- Check spelling

How to Access the Page Body

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2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Check Spelling

1. Click the "Spell Check" button.
2. The spell checker will look for words it does not recognize, starting at the top of the page and scanning down. When it finds one it will open the "Check Spelling" window and offer spelling suggestions.
3. If the flagged word requires correction, select the appropriate word from the "Suggestions List" or type the correct spelling into the **Change To** field and click "Change". To change all occurrences of the flagged word on the page, click "Change All".
4. If the flagged word does not require correction, click "Ignore". Click "Ignore All" to skip over other occurrences.

Remove Formatting

1. Click the "Remove Formatting" button to clear any formatting from the current selected text.
2. Re-format the text as desired.

Clean HTML

1. Click the "Clean HTML" button that looks like a sweeper or broom tool to clean the HTML code. Cleaning HTML will not remove formatting completed in the Page Body editor such as bold, italics, or style.
2. Click "OK" in the "Page Body" to save.

Note: When copying and pasting from Microsoft Word documents, be sure to clean the HTML code. To do this utilize the "Sweeper" to remove excess code or any formatting. Please feel free to use the "Clean HTML" button as often as desired, this will simply re-format content in the "Page Body" as necessary.

Manage Links

- Insert/Edit a link
- Insert an anchor link
- Remove a link

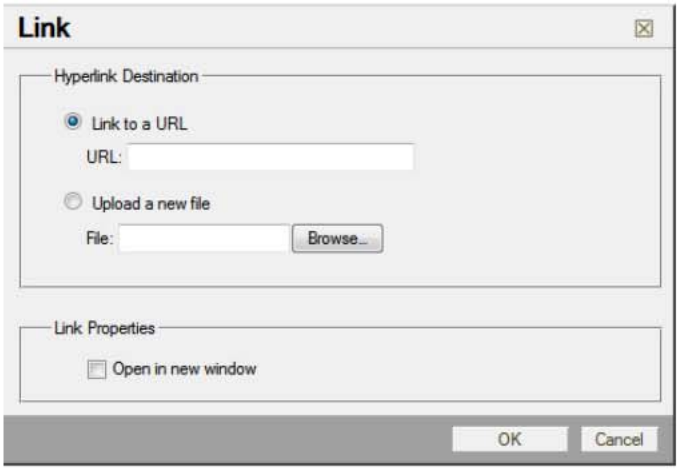
How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Insert/Edit a Link

CourseLeaf enables a user to create hypertext links to web pages, websites, or documents. Linking to a document enables a site visitor to download that document.

1. Highlight the text or image that is desired to be turn into a hypertext link.
2. Click the "Insert/Edit Link" button. This will produce the "Link" window.
3. A user is given the option to link to a URL or a document.



The default hyperlink interface

Link to a website or another page:

1. Highlight the text or image that is desired to be turn into a hypertext link.
2. Click the "Insert/Edit Link" button. This will produce the "Link" window.
3. A user is given the option to link to a web page or a document.
4. Type the destination web address into the text box labeled **URL**.
5. To link to a website or another page outside of the catalog, simply type http://somepage.com. *For example: http://google.com.*
6. For links to pages within the catalog, enter the portion of the URL following .com or .edu. *For example, to link to this page a user would enter: /editors/page-body/links. Note the slashes (/).*
7. To open the link in a new window, click the check box next to "Open in a New Window". *Note: This can confuse web visitors so it should be used sparingly.*

Link to a document or file:

1. Highlight the text or image that is desired to be turn into a hypertext link.
2. Click the "Insert/Edit Link" button. This will produce the "Link" window.
3. A user is given the option to link to a web page or a document.
4. Click "Choose File" and locate the desired file on the local computer.
5. To open the link in a new window, click the check box next to "Open in a New Window". *Note: This can confuse web visitors so it should be used sparingly.*
6. Click "OK" when done.

Link to an anchor:

This option is only available if the page contains anchors. Read more about anchor links below.

1. Highlight the text or image that is desired to be turn into a hypertext link.
2. Click the "Insert/Edit Link" button. This will produce the "Link" window.
3. A user is given the option to link to a web page or a document.
4. Click the "Insert/Edit Link" to an Anchor option.

5. Select the desired anchor from the drop down list.
6. Click "OK".

Un-link Text or Image

1. In the "Page Body", highlight the hypertext link to un-link.
2. Click the "Remove Link" button.This will turn the link back into regular text or image.

Insert an Anchor Link

An anchor link carries visitors to a specific location on a page. For example, it is common to place an anchor at the top of the page, and then create corresponding anchor links throughout the page body content so people can quickly return to the top of the page.

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

There are two parts to an anchor link: the anchor and a link to the anchor. First place the anchor in the desired place on the page. Then create a link to the anchor. A user can create multiple links to the same anchor.

1. Place the anchor:
   - Place the cursor where an anchor should be added and click the "Anchor" button. This will open a window where a user can define the anchor.
   - 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. Then click "OK". This anchor will now be available as a link destination.
2. Link to the anchor:
   - Type and highlight the desired link text.
   - Click the "Insert/Edit Link" button.
   - Click the"Insert/Edit Link" to an Anchor option, select the desired anchor from the drop down list, and click "OK".

Helpful Tips:

It's vital to utilize links consistently in order to avoid extra edits down the road. In other words, some users prefer www.linktosomething.com. Whereas, other users prefer http://linktosomething.com and some users like to have "Link to something" as text linked. Some users are familiar with relative linking, so a user may input links to other CourseLeaf pages as *"../../pagename" when it should always simply be :"/pagename/"*.

Special Characters & Page Breaks

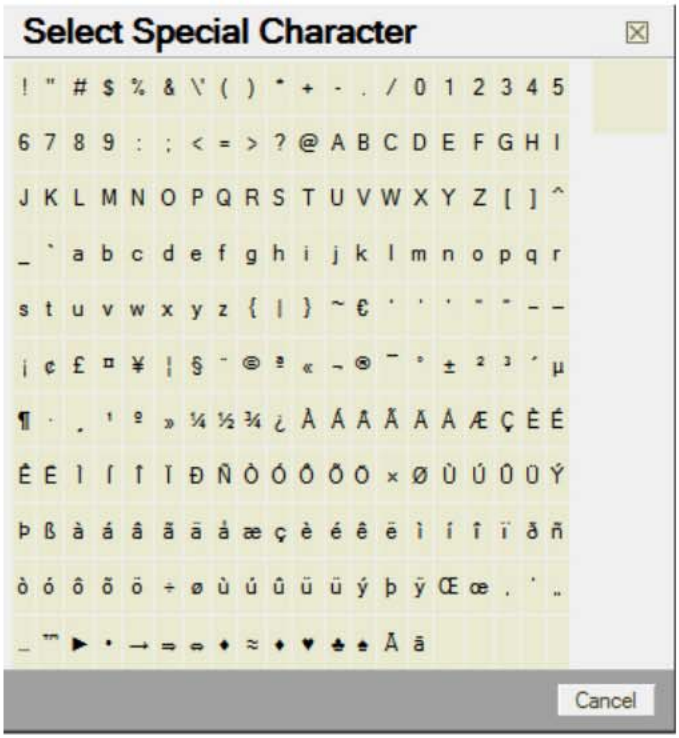
- Insert a horizontal line
- Add a special character

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Add a Special Character

1. To add a special character, position the cursor in the desired location and click the "Special Character" button.
2. This will open the "Special Character" window. Find and click the desired character.



The default special character interface

Insert a Horizontal Line

Click the "Insert Horizontal" Line button to add a page-width horizontal line.

Insert & Edit Structured Content

- Insert/Edit Database Field
- Insert/Edit Formatted Table (p. 12)

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

About Structured Content

Structured content creates elements in the "Page Body" in a pre-defined format. A user may need to add items to structured content, or may need to select items whose information is then drawn from a database, or a combination of the two.

Structured content options are highly customized from organization to organization, but each customization works with many of the same principles.

In many cases there may be several different types of structured content choices. Structured content is always surrounded by a blue box in the Page Body editor.

Advantages of Structured Content

- Structured content is faster to maintain, since most of the formatting is already managed for the user.
- It ensures the formatting is consistent across publication platforms, such as web, PDF, and eBook.
- In the cases where information is drawn from a database, information is accurate and entry changes within the database are consistently applied to the entire website.
- Structured content blocks are easily moved around within the "Page Body".
- Items within the structured content blocks are easily edited.
- Changes to a structured content layout, by the site administrator, are universally applied throughout the website.

Types of Structured Content

1. Database Field - this is structured data that appears "inline" in the middle of a paragraph or sentence. This is typically an Inline Course reference or other elements referenced in the middle of a sentence, such as important dates.
2. Formatted Table (p. 12) - this is structured data that is a "block" of data, such as a table or a series of paragraphs. Examples of formatted tables are course lists, plan of study grids, or shared "Other" content pages.

Insert Structured Content

A user may add as many structured content elements to a page as desired.

1. Place the cursor in the desired location to insert the structured content.
2. Click the "Insert/Edit Database Field" or "Insert/Edit Formatted Table (p. 12)" button. This opens a new window where a user can select the type of structured content that is to be added.
3. Select the desired structured content option from a drop down list.
   - This will then open a new window with the specific options for the structured content choice.
4. Add and/or select items.
   - If a user must populate the structured content option with information, click "New Entry" for each additional item and provide the requested information for each new entry.
   - If the system is tied into a database, select desired items from the database list and move them over to the structured content option list. A user may also need to provide additional information for these selected items.
5. Click "OK" to post a structured content block to the "Page Body" screen. The structured content will appear as a table surrounded by a blue border. The blue border will not appear on the live version of the page.

Edit / Delete Structured Content Entries

1. Double click the blue border of the list that is to be edited. Or select the desired list and click the "Insert/Edit Structured Content" button. This will produce a new window with the structured content.
2. Use the popup window to select the items you wish to edit, delete, or move.
3. Modify the item as desired. For example, depending on the customized options, a user may delete it, move it up or down in a list, edit the related fields, etc.
4. Select a new item to edit/delete or click "OK" to apply the updates.

Delete a Structured Content Block

1. Select the structured content block to delete and press the "Delete" key on your keyboard.
2. Click Ctrl+z to undo and restore the content block.

Edit HTML

- Edit HTML

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

Edit Source Code

For users who are familiar with HTML, CourseLeaf provides an "Edit HTML" source tool to format the web site text the "old fashioned way" or perform troubleshooting.

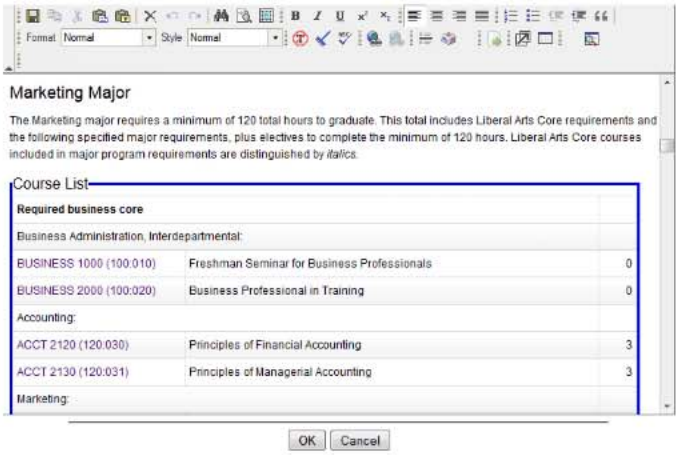
1. Click the "Edit HTML" or "Source" button in the toolbar.
2. The text screen will display HTML tags. Edit content as desired.
3. Return to the original interface by clicking the "Source" button again.
4. Click "OK" in "Page Body" to save changes.

Note: When copying and pasting from Microsoft Word documents, be sure to clean the HTML code. To do this utilize the "Sweeper" (p. 9) *to remove excess code or any formatting.*

Formatted Tables

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

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 the blue border.



Example of formatted table in the page body editor.

Types of Formatted Tables

- Course Lists (p. 13)
- Plan Grids (p. 15)
- Footnotes
- Course Blocks
- Shared Content (p. 17)
- Pre-Defined Tables

How to Insert/Edit a Formatted Table

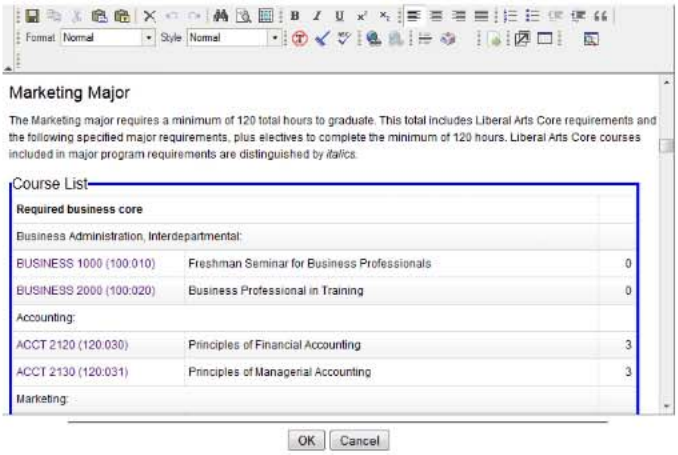
1. Click the "Edit Page" icon on the top left corner of the screen to reveal the CourseLeaf toolbar (p. 2).
2. Select "Page Body" from the CourseLeaf toolbar (p. 2) located across the top of the screen. This will prompt an editing screen to open (areas that can have formatted tables inserted will be designated by a pencil icon).
3. Place cursor in the page body where the table is to be placed or select table to edit.
4. Click the "Insert/Edit Formatted Table" icon .
5. Select the type of table to insert or edit from the drop down list provided (*Example: Course List, Plan of Study Grid, Pre-defined Tables, etc.*).

Helpful Tips:

When working with tables, never copy and paste tables from outside sources into CourseLeaf. Formatting carried over from word processing programs rarely translate into proper HTML markup.

Course Lists

"Course List" is a tool within CourseLeaf used to describe a list of courses. Courses are linked to a central database providing immediate access to course information. A course list provides information in a pre-formatted table structure. Course lists are primarily used to display Programs of Study requirements (Majors, minors, certificates, etc.).



Example of a Course List view in Page Body.

How to Access the Page Body

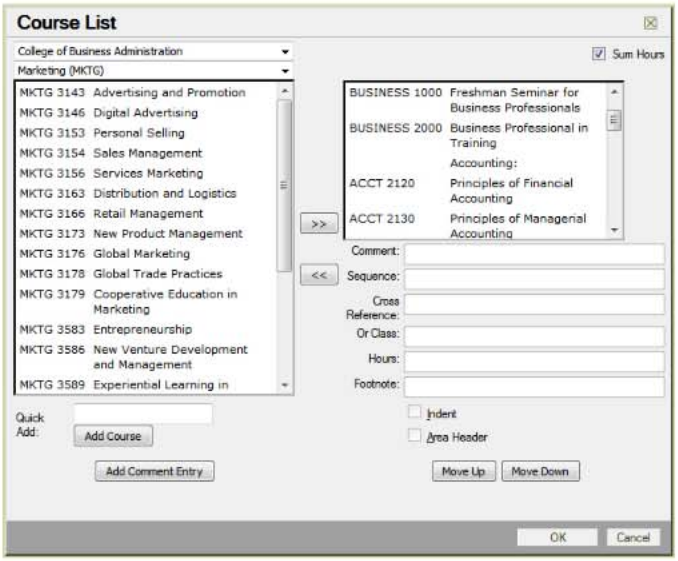
1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

How to Create/Edit a Course List

1. Place cursor in the page body where the course list is to be placed or select existing course list.
2. Click "Insert/Edit Formatted Table" or double click on the blue box around existing course list.

Fields

"Course List" 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.



Example of a Course List Editor

Major Requirements 10		
BIOL 1012 (840:012)	Life: The Natural World	3
BIOL 1014 (840:014) & BIOL 1015 (840:015) 2	Life: Continuity and Change and Life: Continuity and Change - Lab	6 4
BIOL 3120 (840:120)	Plant Diversity and Evolution (See instructor) 1	4
or BIOL 3119 (840:119) 4	Biotechnology Applications	
Select one of the following: 5		3
9 BIOL 4121/5121 (840:121g)	Plant Biotechnology	
BIOL 4122/5122 (840:122g)	Plant Physiology	
BIOL 4127/5127 (840:127g)	Bioinformatics Applications for Biology	
BIOL 4131/5131 (840:131g)	Animal Behavior	
BIOL 6299 (840:299)	Research [1]	
BIOL 1089/6289 3	Seminar	1
Total Hours		7 15

1 This is an example of a footnote. 8

Example of a Plan Grid. Refer to the items below:

- **Comment**[1]: Adds comment in parentheses after selected course.
- **Sequence**[2]: A sequence course describes a required course sequence. Very often occurs in Science courses when a student must take a course and a lab. Enter the course code for the next course in the sequence. Multiple courses can be sequenced together by entering a comma or ampersand (&) to separate the list of course codes.
- **Cross Reference**[3]. A cross reference course describes a course that is offered at the same time and in the same room with the same professor.
  - For instance, if credit is given at both the undergraduate and graduate level, a cross reference course would appear as follows. CHEM101/CHEM502. CHEM101 is referring to credit at the undergraduate level, whereas, CHEM502 is indicating the student is signed up for the course at the graduate level.
  - Another example is a course that is offered by different departments for credit. For example, forensics is a course for students both in the Department of Criminology as well as the Department of Anthropology. Therefore, the course would have different course codes specific to receiving credit in the desired department. In the Department of Anthropology, the course code may be (Anthropology F120). Whereas, in the Department of Criminology the course code might be (Criminology F104). Again, the course would be at the same time and in the same room with the same professor, but receiving different departmental credit. Simply enter the course code in order to list it as a cross reference.
- **Or Class**[4]: The Or Class allows an editor to specify that a student must take one course or another. If there are multiple classes to be listed as an Or Class, it is recommended to use a series of Indented courses with a comment entry at the beginning of the indented series, such as "Select one of the following". To add multiple courses, enter in the courses comma separated with no spaces. For a sub-set, such as take "A" or "B & C", enter "a,b & c" and it will draw in the course list as desired. See "How to Add Comment Entry" for more instructions below.
- **Add Comment Entry**[5]**:** Add Comment Entry allows you to input a new title or field in the list. For example if there are multiple classes listed as an Or Class, in the comment entry input, "Select one of the following" to describe courses in which a student should select from a group of courses. To clean up the list, select each of the courses one at a time underneath the comment entry. Then select Indent for each of those courses in order to make the list as clear as possible to the user.
- **Hours**[6]: The hours field is automatically populated when a course is inserted into the course list. Editors have the ability to change these hours. CourseLeaf will do a look up to ensure that any modified hours are correct. If a course has a range of hours, any hour within the range will be valid. Invalid hours will be highlighted in red in the "Page Body".
- **Sum Hours**[7]**:** Check the box on the top left column to automatically add the total number of credits to be displayed on the Course List.
- **Footnote**[8]: The footnote field allows users to add longer comments or conditions to a course. Only the footnote symbol is entered in the course list. Editors will then need to add a Footnote after the course list in the "Page Body".
- **Indent**[9]: Indenting a course will create a left margin moving the course visually to the right. Hours are not displayed on indented courses. This feature should be used to better describe requirement groups rather than for formatting reasons. It is most used when describing a "One of the following" course set.
- **Area Header**[10]. A formatting feature that will change the selected course's font to a larger and bolder font.

How to Add a Course

1. Place cursor in page body where the course list is to be placed or select existing course list.
2. Click "Insert/Edit Formatted Table" or double click on the blue box around existing course list.
3. Select "Course List" from drop-down menu, click "OK".
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 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 course from "Course Inventory".
      ii Click (>>) button to add a course to the list.
   C. Option 2
      i Double-click course from "Course Inventory".
   D. Option 3
      i Enter course code into **Quick Add.**
      ii Click "Add Course".
5. Click "OK" in the "Course List" editing screen to close the "Course List" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Remove a Course

1. Select existing course list.

2. Click "Insert/Edit Formatted Table" or double click on the blue box around existing course list.
3. Highlight course in the right list to remove.
4. Click (<<) button to remove a course from the list.
5. Click "OK" in the "Course List" editing screen to close the "Course List" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Reorganize a Courselist

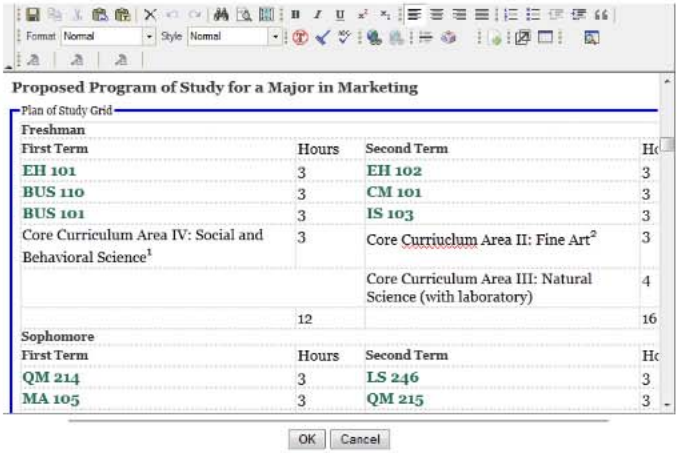
1. Select existing course list.
2. Click "Insert/Edit Formatted Table" or double click on the blue box around existing course list.
3. Highlight course to move in right list.
4. Click "Move Up" or "Move Down" to change the order of the course.
5. Click "OK" in the "Course List" editing screen to close the "Course List" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Add Comment Entry

1. Place cursor in page body where the course list is to be placed or select existing course list.
2. Click "Insert/Edit Formatted Table" or double click on the blue box around existing course list.
3. Select in right list where **Comment Entry** is to be placed.
4. Click "Add Comment Entry". A text window will open.
5. Enter text to be placed in course list.
6. Click "OK" in the "Course List" editing screen to close the "Course List" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

Plan of Study Grids

"Plan of Study Grid" is a tool within CourseLeaf used to describe a suggested order of courses to be taken. Courses are linked to a central database providing immediate access to course information. A "Plan of Study Grid" provides information in a pre-formatted table structure. "Plan of Study Grids" are primarily used to display Programs of Study (Majors, minors, certificates, etc.).



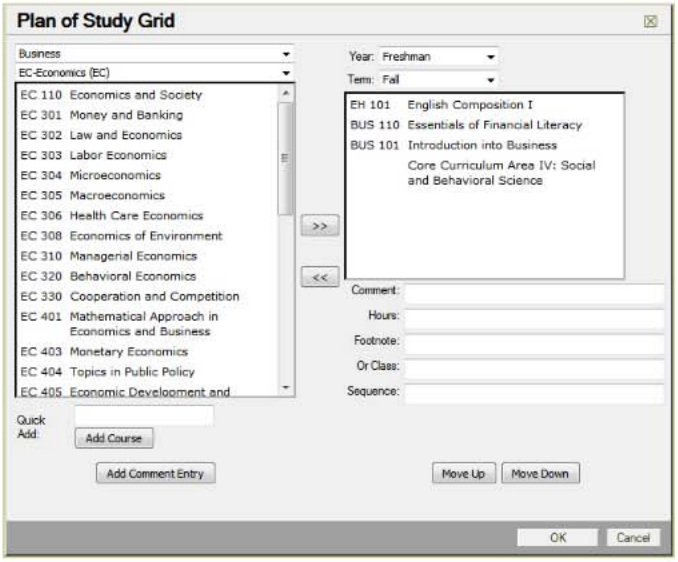
Example of a Plan Grid view in Page Body.

How to Insert/Edit Plan Grid

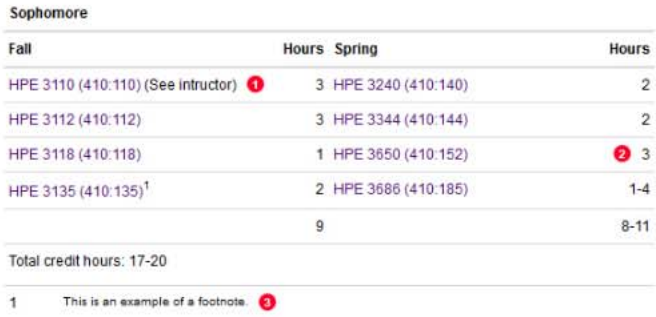
1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (p. 2).
2. Select "Page Body" from the CourseLeaf toolbar across the top of the screen. This will prompt an editing screen to open.
3. Place cursor in page body to situate the "Plan of Study Grid" in the "Page Body", or select "Plan of Study Grid" to edit.
4. Click "Insert/Edit Formatted Table" or double click on the "Plan of Study 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.



Example of a Plan Grid Editor. Please note that all of the fields listed below may not be shown in the image above.



Sophomore

Fall	Hours	Spring	Hours
HPE 3110 (410:110) (See intructor) 1	3	HPE 3240 (410:140)	2
HPE 3112 (410:112)	3	HPE 3344 (410:144)	2
HPE 3118 (410:118)	1	HPE 3650 (410:152)	2 3
HPE 3135 (410:135)[1]	2	HPE 3686 (410:185)	1-4
	9		8-11

Total credit hours: 17-20

1 This is an example of a footnote. 3

Example of a Plan Grid Editor. Please note that all of the fields listed below may not be shown in the image above. Examples shown in the image above are field that are standard for a Plan Grid. Other fields that are listed below can be added for each school.

- **Comment**[1]. Adds comment in parentheses after selected course.
- **Sequence**. A sequence course describes a required course sequence. Very often occurs in Science courses when a student must take a course and a lab. Enter the course code for the next

course in the sequence. Multiple courses can be sequenced together by entering a comma or ampersand (&) to separate the list of course codes.

- **Cross Reference**: A cross reference course describes a course that is offered at the same time and in the same room with the same professor.
  - For instance, if credit is given at both the undergraduate and graduate level, a cross reference course would appear as follows: CHEM101/CHEM502. CHEM101 is referring to credit at the undergraduate level, whereas, CHEM502 is indicating the student is signed up for the course at the graduate level.
  - Another example is a course that is offered by different departments for credit. For example, forensics is a course for students both in the Department of Criminology as well as the Department of Anthropology. Therefore, the course would have different course codes specific to receiving credit in the desired department. In the Department of Anthropology, the course code may be (Anthropology F120). Whereas, in the Department of Criminology the course code might be (Criminology F104). Again, the course would be at the same time and in the same room with the same professor, but receiving different departmental credit. Simply enter the course code in order to list it as a cross reference.
- **Or Class**: The Or Class allows an editor to specify that a student must take one course or another. If there are multiple classes to be listed as an Or Class, it is recommended to use a series of Indented courses with a comment entry at the beginning of the indented series, such as "Select one of the following". To add multiple courses, enter in the courses comma separated with no spaces. For a sub-set, such as take "A" or "B & C", enter "a,b & c" and it will draw in the course list as desired. See "How to Add Comment Entry" for more instructions below.
- **Add Comment Entry:** Add Comment Entry allows you to input a new title or field in the list. For example if there are multiple classes listed as an Or Class, in the comment entry input, "Select one of the following" to describe courses in which a student should select from a group of courses. To clean up the list, select each of the courses one at a time underneath the comment entry. Then select Indent for each of those courses in order to make the list as clear as possible to the user.
- **Hours**[2]: The hours field is automatically populated when a course is inserted into the course list. Editors have the ability to change these hours. CourseLeaf will do a look up to ensure that any modified hours are correct. If a course has a range of hours, any hour within the range will be valid. Invalid hours will be highlighted in red in the "Page Body".
- **Sum Hours:** Check the box on the top left column to automatically add the total number of credits to be displayed on the Course List.
- **Footnote**[3]: The footnote field allows users to add longer comments or conditions to a course. Only the footnote symbol is entered in the course list. Editors will then need to add a Footnote after the course list in the "Page Body".
- **Indent**: Indenting a course will create a left margin moving the course visually to the right. Hours are not displayed on indented courses. This feature should be used to better describe programs rather than for formatting reasons. It is most used when describing a "One of the following" course set.
- **Area Header**: A formatting feature that will change the selected course's font to a larger and bolder font.

How to Access the Page Body

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar (https://help-stage.courseleaf.com/getting-started/courseleaf-toolbar).
2. Select the "Page Body" tab from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing environment to open where a user can edit the content on a specified page.

How to Add a Course

1. Place cursor in page body where the "Plan of Study Grid" is to be placed or select existing grid.
2. Click "Insert/Edit Formatted Table" or double click on the blue line of the "Plan of Study Grid".
3. 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 to add to your grid based on the College and Department you selected. The right hand column is where you move the courses to build your 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".
4. Click "OK" in the "Plan of Study Grid" editing screen to close the "Plan of Study Grid" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Add Comment Entry

1. Select existing "Plan of Study Grid".
2. Click "Insert/Edit Formatted Table" or double click on the blue line of the "Plan of Study Grid".
3. Select **Year** and **Term** to insert comment.
4. Select course in right list where **Comment Entry** is to be placed. The comment will appear below this course.
5. Click "Add Comment Entry".
6. A text window will open titled "Add Comment Entry".
7. Enter text in the **Enter Comment Text** field as it should appear in the "Plan of Study Grid".
8. Click "OK" in the "Plan of Study Grid" editing screen to close the "Plan of Study Grid" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Remove a Course or Comment Entry

1. Select existing "Plan of Study Grid".

2. Click "Insert/Edit Formatted Table" or double click on the blue line of the "Plan of Study Grid".
3. Select **Year** and **Term** of course to remove.
4. Highlight course in right list.
5. Click (<<) button to remove a course from the grid.
6. Click "OK" in the "Plan of Study Grid" editing screen to close the "Plan of Study Grid" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

How to Reorganize a Plan Grid

1. Select existing "Plan of Study Grid".
2. Click "Insert/Edit Formatted Table" or double click on the blue line of the "Plan of Study Grid".
3. Select **Year** and **Term** to insert course.
4. Highlight course or comment entry to move in right list.
5. Click "Move Up" or "Move Down" to change the order.
6. Click "OK" in the "Plan of Study Grid" editing screen to close the "Plan of Study Grid" screen and refresh the "Page Body". Click "OK" when finished to save any changes that were made.

Inline Course

Definition

Inline Course is a tool within CourseLeaf used to link a course back to the Courseleaf course database providing immediate access to course information.

Usage

Inline Courses are designed to be single course that exists within a body of text.

Insert/Edit Inline Course

1. Edit Page
2. Page Body
3. An editing screen will open.
4. Place cursor in page body where the Inline Course is to be placed or select existing Inline Course to edit
5. Click Insert/Edit Database Field
6. Use Course Picker (double click on course to select) or Quick Add to select a course.
7. Choose Format to display course.
8. Click "OK" to preview.

Shared Content

"Shared Content" is a tool within CourseLeaf used to display the same information on multiple pages while editing in a single location that goes through workflow independently from the rest of the page. This tool provides advanced editing control of a single element over many pages. "Shared Content" can also be utilized to divide a single page where multiple editors are responsible for limited content on a page.

How to Insert Shared Content

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar.
2. Select "Page Body" from the CourseLeaf toolbar located across the top of the screen. This will prompt an editing screen to open.
3. Place cursor in the page body where the "Shared Content" should appear or select "Shared Content" to change.
4. Click "Insert/Edit Formatted Table".
5. Select Other Content; click "OK".
6. Select Shared Content to display; click "OK".

How to Edit Shared Content

1. Click "Edit Page" on the top left corner of the screen to reveal the CourseLeaf toolbar. 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.

CIM

CourseLeaf Curriculum, or CourseLeaf CIM, takes the entire curriculum process on-line, integrates, and builds on the CourseLeaf catalog software to provide a comprehensive tightly integrated Curriculum and Catalog product. Your Program and Course Approval processes will now be tightly integrated with both the catalog itself as well as your SIS.

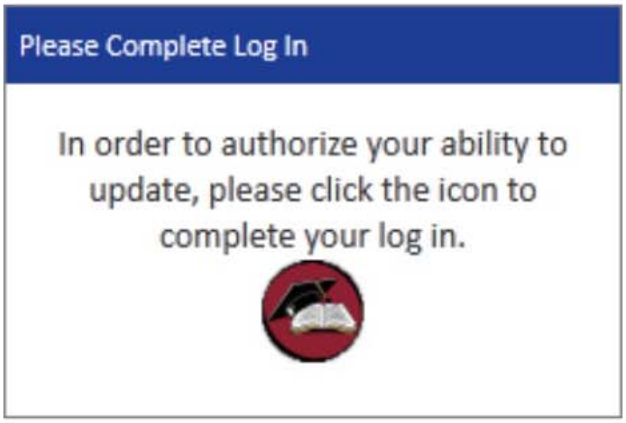
The CIM module will import course information from your SIS, provide customized pre-populated forms for authors, automatically create workflow without human intervention, identify all impacted courses by a proposed change, track edits and comments, report on status, generate customized PDF files on demand for committee meetings, and will assist in automatically updating the SIS at the end of the process. The CourseLeaf catalog software will then take the approved SIS data and approved programs data and automatically update all catalogs.

For documentation on how to manage CourseLeaf CIM, please visit the Administrative Console (https://help.courseleaf.com/administrators/administrative-console) for more options, or select one of the following:

- Course Workflow Management (https://help.courseleaf.com/administrators/administrative-console/cimworkflowmanagement20)
- Program Workflow Management (https://help.courseleaf.com/administrators/administrative-console/cimworkflowmanagement20)
- CIM Code Management (https://help.courseleaf.com/administrators/administrative-console/cimcode)
- CIM Help Bubble Management (https://help.courseleaf.com/administrators/administrative-console/cimhelpbubble)

Getting Logged In

CourseLeaf CIM requires a user to log in. When the user logs in to CourseLeaf CIM, he/she will be able to begin to propose, edit, or delete programs or courses that are listed utilizing a systematic workflow.

1. Navigate to http://yourschool.dev9.leepfrog.com/courseadmin/
2. Please complete log in by clicking the icon as displayed in the image below:
3. 

The default image of the click-able icon to prompt a user to log in.

4. An existing single-sign on (SSO) log in name and password can be used to log into CIM.
5. After logging in, the user will see the following CIM window:
6. 

The default CIM window.

Note: Text listed above the search engine field can be changed to meet the needs of your University. In other words, "Search, edit, add, and deactivate courses." can be altered, but this will have to be done internally at Leepfrog.

Basic Use

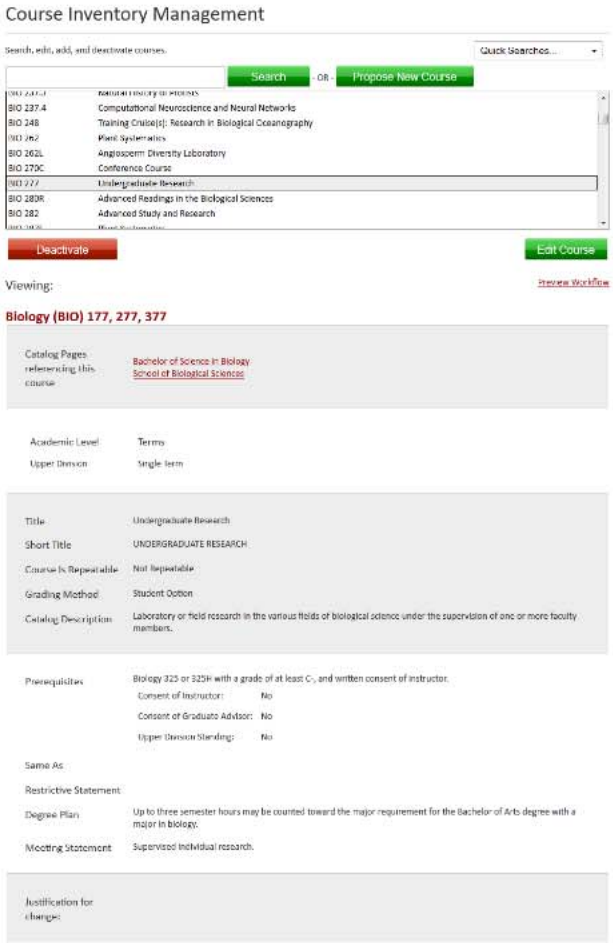
CourseLeaf CIM is highly customized for each university, however CourseLeaf CIM has some features that are standard throughout all use. For instructions on "Basic Use" please read the instructions listed below.

How to Search for a Course

1. Follow the steps to navigate to CIM and log in as found on the Getting Logged In (p. 18) page.
2. In the search field located on the top left of the CIM window, type in the academic focus (department, subject, or field of study abbreviation), course title, or course code. To search for a partial word match, type in the academic focus, course title, or course code followed by an asterisk. For example, if a user types in "BIO 101C" without an asterisk, "BIO 101C" will only appear as a result. However, if a user types in "BIO 101C*" multiple courses containing the text will appear. A search for *physic* will find "Biophysics" as well as "Physical Science"
3. 

The default CIM window with an example of a wildcard search or search with a asterisk.

4. Select "Search" or press the Enter key.

5. Select the desired course in order for more information specific to that course to appear below the results section. *Note: CIM also lists other courses that reference the desired course. Every time there is an update of the feed, it will automatically update these lists.*
6. Results will appear below the search field in the results.
7. 

Example of a CIM window once a course is selected.

How to Perform a Quick Search

1. Follow the steps to navigate to CIM and log in as found on the Getting Logged In (p. 18) page.
2. Select the drop down menu located on the top right corner of the CIM window. *Note: In the drop down menu there is a list of pre-defined searches to filter the results. Leepfrog can add more search filters if desired.*
3. Select a category that you wish to filter your search results by. Results will appear below the search field in the results.
4. 

Example of a CIM window highlighting the quick search drop-down menu.

How to Propose a New Course

1. Follow the steps to navigate to CIM and log in as found on the Getting Logged In (https://help.courseleaf.com/cim/basicuse/help-stage.courseleaf.com/cim/gettingloggedin) page.
2. In the Propose New Course field located on the top left of the CIM window, type in a new course code or topic. *Note: If configured, CIM will notify a user when a user attempts to add a course code already in use.*
3. Select "Propose New Course". This will prompt a Propose New Course or New Course Proposal form to load. Forms are specific to each school. Simply follow the form to complete the required information.
4. After completing the form, select one of the following:
   A. "Cancel" to not save any changes and return to the previous window.
   B. "Save Changes" to save any changes that have been made and come back to the form at a later time. This does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields.
   C. "Admin Save" to save and submit all changes, but to bypass workflow. This may be useful when there is something simple like a typo that needs to be corrected and it is not necessary to go through workflow for approval. This feature is only available to Administrators.
   D. "Save & Submit" to save and submit all changes for approval. All required fields must be filled out before the proposal can be submitted for approval. The new course proposal will go to the next person in the approval process of workflow. The next user in workflow will be sent an automated email to notify the user they can now review, edit, approve, or reject the new course proposal.

How to Edit a Course

1. Follow the steps to navigate to CIM and log in as found on the Getting Logged In (p. 18) page.
2. In the search field located on the top left of the CIM window, type in the field of study abbreviation, course title, or course code that you wish to edit.
3. Select the course that you wish to edit from the results window.
4. Select "Edit Course" from the CIM window. This will prompt a Course Inventory editing window to open. The form or fields will be pre-populated with text.
5. After completing the form, select one of the following:
   A. "Cancel" to not save any changes and return to the previous window.
   B. "Save Changes" to save any changes that have been made and come back to the form at a later time. This does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields.
   C. "Admin Save" to save and submit all changes, but to bypass workflow. This may be useful when there is something simple like a typo that needs to be corrected and it is not necessary to go through workflow for approval. This feature is only available to Administrators.

D. "Save & Submit" to save and submit all changes for approval. All required fields must be filled out before the proposal can be submitted for approval. The new course proposal will go to the next person in the approval process of workflow. The next user in workflow will be sent an automated email to notify the user they can now review, edit, approve, or reject the new course proposal.

How to Delete/Drop/Deactivate a Course

1. Follow the steps to navigate to CIM and log in as found on the Getting Logged In (p. 18) page.
2. In the search field located on the top left of the CIM window, type in the field of study abbreviation, course title, or course code that you wish to deactivate.
3. Select the course that you wish to deactivate from the results window.
4. Select deactivate from the CIM window.
5. Complete the form provided.
6. Select "Confirm" to submit the request or select "Cancel" to not save any changes.
7. 

Example of the deactivate a course window.

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