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CourseLeaf Help

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

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

Help Site Updates

- CourseLeaf CAT Release Notes

CourseLeaf

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

Overview

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

Browsers

Overview

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

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

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

Troubleshooting Browser Issues

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

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

Known Browser Issues

Chrome

Anchors

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

Workarounds:

- use another supported browser.
- create a link manually in the "Source" tool. The link should be set in the source tool as follows: `The Link phrase`

Make Link a Parent

An error is shown on clicking Apply

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

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

Workarounds:

- use another supported browser.

Web Site Accessibility

Overview

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

Considerations

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

Showing Differences (Red/Green Markup)

Overview

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

Junior Year		
Fall		
CHEM 470	Thermodynamics & Kinetics	3
<u>CHEM 454</u>	Inorganic Chemistry II	3
<u>CHEM 454L</u>	Inorganic Chemistry II Laboratory	1
<u>CHEM 466</u>	Fundamentals of Physical and Biophysical Chemistry	4
<u>CHEM 443</u>	Instrumental Analysis III - Chromatography/Mass Spectrometry 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 an addition, it will just appear as normal text. Nothing actually changed from last approved content and the current edits.

View Changes Per Editor

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

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

CourseLeaf Catalog (CAT)

- Administrators
 - A-Z Index
 - Annual Checklist
 - Catalog Console
 - CourseLeaf API
 - Edit Navigation
 - Error Messages
 - Filters
 - Manage Tabs
 - Owners and Workflow
 - Publishing
 - Site Map
 - SiteSearch
- Borrowed Content (p. 8)
- Inline Course (p. 9)
- Page Body Editor
 - Cut, Copy, Paste, Delete (p. 9)
 - Edit HTML Source (p. 10)
 - Find, Replace, Reveal (p. 10)
 - Format Text (p. 11)
 - Links (p. 12)
 - Manage Selected Content (p. 14)
 - Remove Formatting (p. 16)
 - Special Characters & Horizontal Rules (p. 16)
 - Undo & Redo (p. 16)
- Shared Content (p. 17)
- Tables (p. 18)
 - Course Descriptions (p. 19)
 - Course Lists (p. 20)
 - Footnotes (p. 24)
 - Formatted Content from Data (p. 25)
 - On This Page Navigation (p. 26)
 - Plan of Study Grids (p. 27)
 - Pre-Defined Tables (p. 29)
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- Toolbar (p. 30)
 - Accuracy Report (p. 32)
 - Comments (p. 32)
 - Faculty List (p. 32)
 - Graphic (p. 33)
 - Set Up (p. 34)
 - Show Differences (p. 36)
 - View as PDF (p. 36)

Borrowed Content

Overview

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

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

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

How to Insert Borrowed Content

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

How to Update Borrowed Content

Option 1

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

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

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

Option 2

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

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

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

Option 3

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

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

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

How to Remove Borrowed Content

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

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

Inline Course

Overview

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

How to Insert an Inline Course

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

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

How to Insert an Inline Course with the Course Picker

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

How to Edit an Inline Course

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

Page Body Editor

Cut, Copy, Paste, Delete

Page Body Editor Buttons and Keyboard Shortcuts

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

How to Copy and Paste Text

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

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

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

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

Helpful Tips:

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

Edit HTML Source

How to Edit Source Code

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

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

Find, Replace, Reveal

Page Body Editor Buttons and Keyboard Shortcuts

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

How to Find Text

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

How to Replace Text

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

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

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

How to Show Block / Reveal Formatting

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

Revealed formatting is identified by its HTML tag:

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

How to Select All

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

Format Text

Page Body Editor Buttons and Keyboard Shortcuts

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

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

Format

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

Accessibility Considerations

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

How to Add Headings

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

Helpful Tips for using Headings

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

Bulleted Lists

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

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

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

How to Create a Bulleted List

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

Links

Overview

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

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

How to Create Links

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

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

How to Link to an Email Address

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

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

How Link to an Anchor

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

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

Place the anchor:

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

This anchor will now be available as a link destination

Link to the anchor:

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

How to Upload a Document and Add a Link

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

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

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

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

How to Unlink

1. Open the toolbar

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

Links in the PDF

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

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

Helpful Tips

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

Manage Selected Content

Overview

- Manage Selected Content (Admin only)

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

How to Open the Page Body Editor

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

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

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

How to Create a New Page

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

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

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

How to Move Content to a New Page Tab

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

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

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

How to Move Content to an Existing Page Tab

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

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

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

How to Move Content to a New Shared Page

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

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

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

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

9. The page owner and workflow will be filled with the owner and workflow for the current page. This may be changed at this time or later.
10. Click OK. A Progress note will appear showing the content has been created. The content will now be in a blue box called Other Content.

How to Move Content to a New CIM Program

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

Remove Formatting

Page Body Editor Button

- Remove formatting

How to Remove Formatting

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

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

Special Characters & Horizontal Rules

Page Body Editor Buttons

- Insert a horizontal line
- Add a special character

How to Add a Special Character

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

How to Insert a Horizontal Line

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

Undo & Redo

Page Body Editor Buttons and Keyboard Shortcuts

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

Undo Redo Changes

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

Shared Content

Overview

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

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

Things to Note

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

How to Create Shared Content Using Existing Catalog Content

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

How to Edit Shared Content

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

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

How to Edit Shared Content from Shared Directory

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

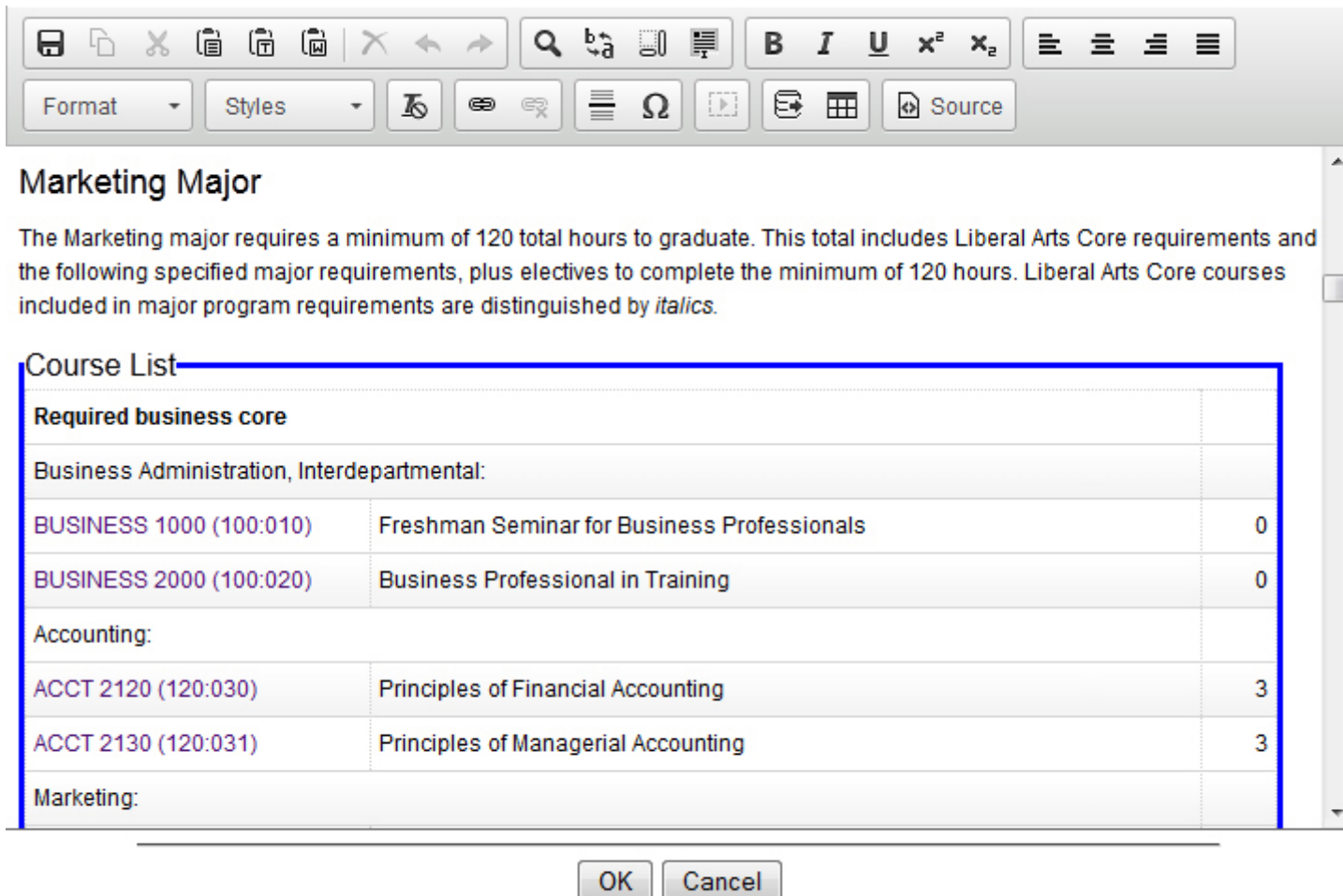
How to Insert Shared Content

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

Tables

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

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



Marketing Major

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

Course List

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

OK Cancel

Example of formatted table in the page body editor.

Types of Formatted Tables

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

Helpful Tips:

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

Course Descriptions

Overview

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

How to Add Course Descriptions (Per Course)

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

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

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

How to Add Course Descriptions (Per Subject)

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

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

Course Lists

Overview

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

Course List Fields

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

The screenshot shows the 'Course List' dialog box with two columns of course options. The left column lists courses from HIST 101 to HIST 113. The right column lists courses from HIST 106 to HIST 112. A 'Sum Credits' checkbox is checked. Below the course lists are fields for 'Comment', 'Sequence', 'Cross Reference', 'Hours', 'Or Class', and 'Footnote'. There are also checkboxes for 'Indent' and 'Area Header'. At the bottom are 'OK' and 'Cancel' buttons. To the right of the dialog is a summary table of the selected 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: ⁷		3
⁷ HIST 107	African American History	
HIST 108	Technology and Civilization	
HIST 109	History of Science	
Total		30

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

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

How to Add a Course List

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

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

How to Remove a Course from a Course List

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

How to Reorder a Courses in a Course List

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

How to Add a Comment Entry

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

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

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

Helpful Hints

Comment Entries that Mimic Course Entries

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

Comment: HIST 1XX::100 Level History Course

Sequence:

Course List

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

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

Course List

Arts and Sciences

Biology (BIOL)

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

>>

<<

Quick Add:

Add Course

Add Comment Entry

☐ Sum Hours

Major Requirements

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

Comment:

Sequence:

Cross Reference:

Or Class:

Hours: 1-2::2

Footnote:

☐ Indent
☐ Area Header

Move Up

Move Down

OK

Cancel

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

Example:

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

Footnotes

Overview

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

How to Insert a Footnote Indicator within Text

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

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

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

How to Insert a Footnote Table

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

How to Edit or Delete a Footnote

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

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

Formatted Content from Data

Overview

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

How To Add Structured Content to a Page

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

How To Delete Structured Content from a Page

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

How to Update Structured Content on a Page

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

On This Page Navigation

Overview

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

On This Page Navigation Fields

On This Page Navigation [X]

Title

Elements to Link ☒ H2

Tabs to Show Links ☒ Overview

Show Tab Name ▼

Nest Links ☒

Sort Alphabetically ☐

Max items Before Depth Drop

OK **Cancel**

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

How to Add On This Page Navigation

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

How to Edit On This Page Navigation

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

Plan of Study Grids

Overview

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

Plan Grid Fields

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

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

HIST 101	History of Western Civilization	3
HIST 102	United States History (See Instructor) 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. 24) after the course list in the Page Body

How to Insert a Plan of Study Grid

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

How to Add a Course to a Plan of Study Grid

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

How to Add Comment Entry

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

How to Remove a Course or Comment Entry

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

How to Reorder a Plan Grid

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

Pre-Defined Tables

Overview

Pre-Defined Tables are designed for each client specifically. With all pre-defined tables, the format is determined by the kind of table selected, but the content of the table is created by the user. If you need a new pre-defined table option added to your list of tables, please contact 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 indent a line in the table, prefix two greater-than signs. To indicate text should be superscript, surround the text with brackets. To use brackets rather than superscript, add one space after the initial bracket. Text beginning with http:// or www. will automatically be turned into hyperlinks. To make an area header for the table, surround the text of the first column in curly brackets.

Examples

Example Input

bold

http://link

www.link

>> indent line

this is [superscript]

[brackets] (note the space after first bracket)

Example Output

bold

<http://this.gets.turned.to.a.link>

www.this.does.too (p. 29)

indent line

this is ^{superscript}

[brackets]

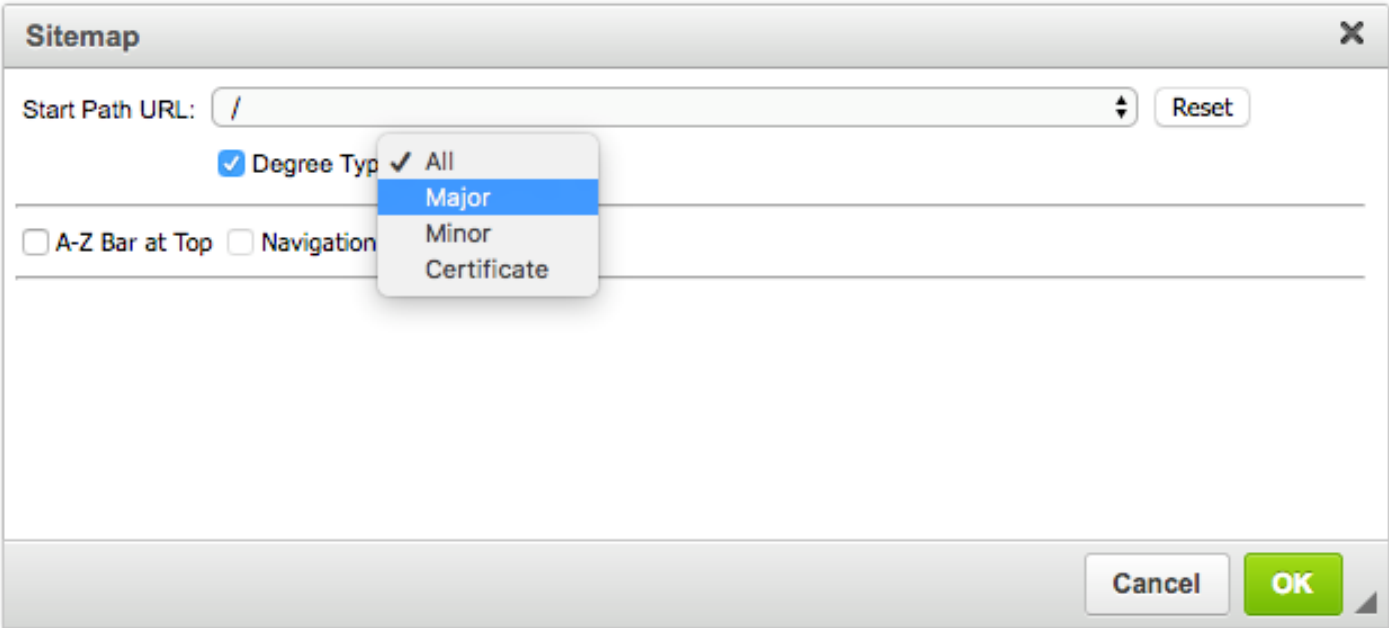
* bullet item
{curly brackets}

• bullet item
spans the columns of the table

Site Map

Overview

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



How To Add A Site Map

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

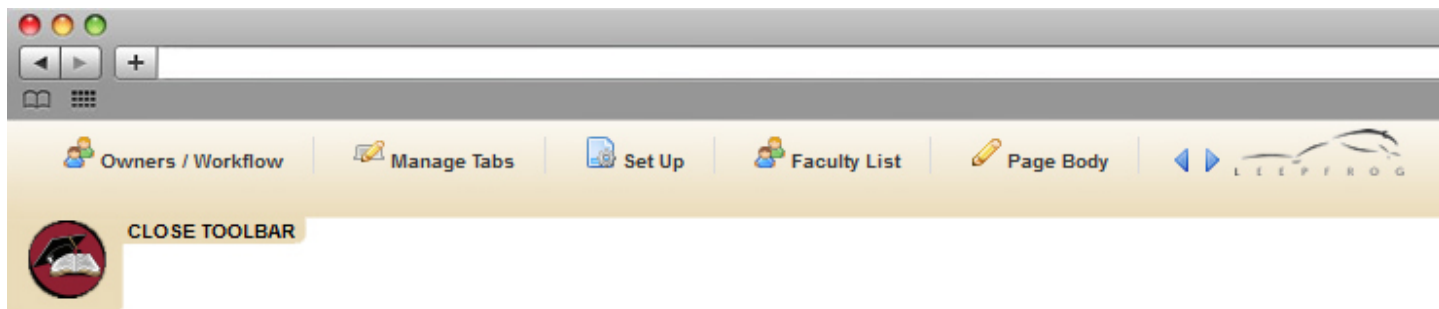
Toolbar

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



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

The Top CourseLeaf Toolbar



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

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

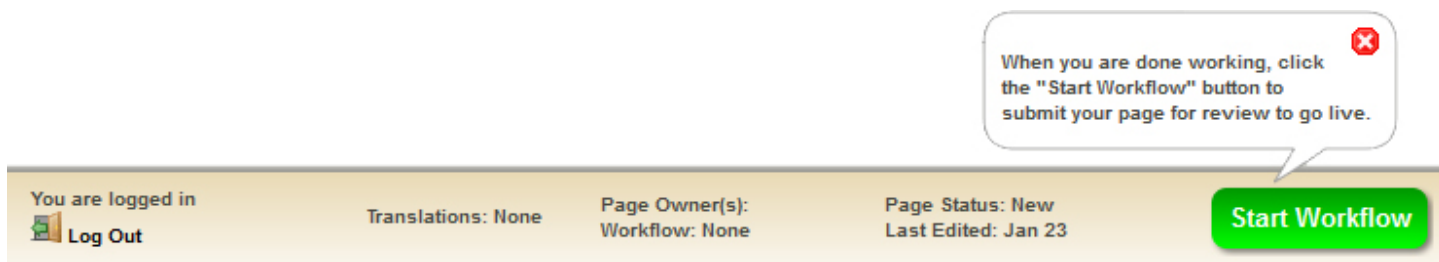
- Owners & Workflow (Administrator Function)
- Manage Tabs (Administrator Function)
- Setup / Title (p. 34)
- Faculty List (p. 32)
- Page Body
- Accuracy Report (p. 32)
- Show Differences (p. 36)
- View as PDF (p. 36)

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

The Bottom CourseLeaf Toolbar

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

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



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

Accuracy Report

Overview

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

How to Run an Accuracy Report

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

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

Comments

Overview

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

How To Add and Review Comments as a Page Owner

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

How To Add and Review Comments as an Approver

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

Faculty List

Overview

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

How to Add Faculty Members

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

How to Edit Faculty Members

1. Click the Faculty List tool

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

How to Rearrange the Faculty List

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

How to Delete Faculty Members

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

Graphic

Overview

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

**COURSELEAF**

Help

User: 


Log Out



Graphic

example-photo
CollegePrograms
CourseDescriptions
ExtralImage01
ExtralImages02
GeneralEducationRequirements
GeneralInformation
Personnel

No Graphic
Find...



example-photo.jpg: 830x261

OK Cancel

How To Add/Edit/Remove a Graphic

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

How To Add an Image to the Graphic Tool

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

Set Up

Overview

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

Set Up

Title:

College: (Ctrl+click to select multiple)

Department: (Ctrl+click to select multiple)

Department web site:

Page Description:

Keywords:

Special Content:

☐ Course Inventory

How to Set Up a Page

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

Show Differences

Overview

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

How to Show Differences

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

View as PDF

Overview

View as PDF allows a user to view the current page as a PDF in a new window. A user cannot make any changes to the catalog page in the PDF. Updates to the catalog page must be made in the Page Body. Leapfrog 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

CourseLeaf Curriculum (CIM)

Overview

CourseLeaf Curriculum Information Management (CIM) takes the entire curriculum process online, integrates, and builds on the CourseLeaf catalog software to provide a comprehensive, tightly integrated Curriculum and Catalog product. Program and course approval is tightly integrated with the catalog and the Student Information System (SIS).

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

Approve Pages

Overview

Approve Pages allows administrators or end users who are part of the workflow to edit, rollback, or approve a page.

The Page Approval Window Has Three Main Sections

1. **Pages Pending Approval (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. **Page Info/Status (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 instruction below*).
3. **Page Review (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.

COURSELEAF

Pages Pending Approval **1**

Filter List Refresh List Your Role: amgarza

PAGE	USER
/undergraduate/schoolofbusinessadministration/programsofstudy/economicsandfinance: Economics and Finance	jogunther
/graduate/generalinformation/academicinformation/mastersanddoctoraldegree/requirements: Master's and Doctoral Degree Requirements	jogunther

Page Info Workflow Status Attached Files Revision History

Title: Master's and Doctoral Degree Requirements
 Last Update: Mar 2, 2016 12:30pm
 Template: standard
 Page Authors: lwallace1, ycopeland1
 Workflow: amgarza
 College:
 Department:

2

PAGE REVIEW

Hide Changes View Changes By: All Changes Edit Rollback Approve

3

LILYPAD UNIVERSITY

Catalog Home A-Z Index Print / Download Options

2016-17 Catalogue	Home > Graduate Catalog > General Information > Academic Information > Master's and Doctoral Degree Requirements
All Courses	
Graduate Catalog	Master's and Doctoral Degree Requirements

The Page Approval window, showing a page that has been revised.

How to Access Approve Pages

1. Navigate to the Catalog Console or click the Page Approval link from the automated email
2. Click Approve Pages, located under the Administration heading

3. Click the **Your Role** drop down menu at the top of the page and select the account for which you want to review and approve pages.
 - If you use the link from the automated email, your role will be pre-selected for you
 - **Note:** Click the Refresh List button to see if new pages have been added since your last visit or if the list doesn't contain an expected page

How to Take Action on a Page

1. Navigate to the Catalog Console or click the Page Approval link from the automated email
2. Click Approve Pages, located under the Administration heading
3. Click the **Your Role** drop down menu at the top of the page and select the account for which you want to review and approve pages.
 - If you use the link from the automated email, your role will be pre-selected for you
 - **Note:** Click the Refresh List button to see if new pages have been added since your last visit or if the list doesn't contain an expected page
4. 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.
 - To filter your pages, click the Filter button then enter text to filter on. You may filter on any text in the URL or title that shows in the Pages Pending Approval window. To reset the filter to show all, click Filter, then click OK with the filter field blank.
5. Review content in the Page Review window:
 - **View changes made:** 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 any number of page editors can be in a workflow. Each editor reviews or edits content sent from 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:** View the document without color coding or markup.
6. Choose an action on the page. One of four actions may be taken after reviewing the page. To edit, rollback, or approve the page, click the appropriate button 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.
 - **Rollback 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. Make comments in the space provided and click Rollback 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)

1. Navigate to the Catalog Console or click the Page Approval link from the automated email
2. Click Approve Pages, located under the Administration heading
3. Click the **Your Role** drop down menu at the top of the page and select the account for which you want to review and approve pages.
 - If you use the link from the automated email, your role will be pre-selected for you
 - **Note:** Click the Refresh List button to see if new pages have been added since your last visit or if the list doesn't contain an expected page
4. Scroll through the Pages Pending Approval list and select the page to edit
5. When a page is selected, the reports and workflow status window and the Page Review window will be populated with information
6. Select the Workflow Status tab in the Page Info/Status window in the upper right of the screen
7. Select Update Pending Workflow to update workflow for this approval cycle only
8. Update workflow as desired
 - **Note:** An automated email will not be sent if the first user in the Pending Workflow is changed. Also, the first user in the Pending Workflow list should not be updated to a FYI workflow step.
9. Click OK

Note: Update Pending Workflow is an administrator-only feature.

Helpful Tips:

- Be sure to click Approve when finished so the page advances through the workflow.
- All changes are visible by default. Click Hide Changes to view only the final text. Changes are also viewable by author, if desired.

Ecosystem

Overview

The CIM Ecosystem shows courses, programs and catalog pages that are related to the course being viewed, and catalog pages that house the program being reviewed. The ecosystem is usually the first box in the Proposal Preview section of CIM. The entries in the ecosystem are links that will open that page or proposal in CIM.

Catalog Pages
referencing this
course

[Biology](#)

[Biology \(BIOL\)](#)

[Earth and Space Science](#)

Programs referencing
this course

[BAE-BIOL: Biology/Secondary, Bachelor](#)

[BAE-BIOL-SECD: Biology Education - Sec](#)

[BS-BIOL: Biology, Bachelor of Science](#)

[BS-BIOL-PMPD: Biology - Pre-Med/Pre-I](#)

[BS-ENVS: Environmental Science - Envir](#)

[BS-ENVS-ENBI: Environmental - Environ](#)

[BS-ENVS-ENCM: Environmental Science](#)

[BS-ENVS-ENGY: Environmental Science -](#)

[MN-EDBS: Biology Secondary Minor](#)

[MN-ENCM: Environmental Chemistry M](#)

Other Courses
referencing this
course

[In The Catalog Description:](#)

[BIOL 441 : ECOLOGY LAB](#)

[BIOL 442 : CONSERVATION BIOLOGY](#)

[As A Banner Prerequisite:](#)

[BIOL 441 : ECOLOGY LAB](#)

[BIOL 444 : FIELD ECOLOGY](#)

What the Ecosystem Shows

Catalog Pages referencing this course. These pages will generally be course description pages, department pages that have course lists, or any time a course is mentioned in the catalog outside of CIM. *Note: courses that appear in a CIM Program in the catalog will not show in this section.*

Programs referencing this course. These are CIM programs that reference this course in some way, usually in the program description and requirements field of the CIM program.

Other Courses referencing this course. These are courses that name the course being viewed in some way. This display is custom for each institution, but it may include prerequisites, corequisites, catalog description, or other information.

Catalog Pages referencing this program. These pages where the CIM Program resides in the catalog.

How the Ecosystem is Used

Many institutions wish to update Related Departments as an FYI step in workflow. If you use a RelatedDepts step in workflow, the Related Departments are the departments found in this ecosystem.

History

Overview

CIM History is a permanent record of the approved course or program from the last time it went through workflow. History displays the approval path, workflow steps, roll back comments, and red green mark up. History goes back to the day CIM was implemented, and proposals that were started and shredded or rolled out of workflow and back to the proposer will not be part of the course or program history. Only proposals that have been completely approved will show up in the history. History is view only; it cannot be edited.

How to View All History

1. Navigate to your CIM Courses or Programs landing page
2. Search for the course or program with the history you want to view
3. Click the date that you want to view

How To Search For History

1. Navigate to your CIM Courses or Programs landing page
2. Search for the course or program and check the History checkbox

The search results list each entry in the history on a separate line with the date of approval in the Workflow column. Choose the history you wish to review.

Proposals

Proposal Status

The proposal status listed in the Status column indicates the state of a proposal.

Course Inventory Management

You are logged in as leepfrog
[Help](#)

Use an asterisk (*) in the search box as a wild card. For example, MATH* will find everything that starts with "MATH", *MATH everything that ends with "MATH", and *MATH* everything that contains "MATH". The system searches the Course Code and Title. Quick Searches provides a list of predefined search categories to use.

Run the [Pending Curriculum Approval Report](#) to get a list of proposals and changes that are pending the approval of a particular role.

- OR -

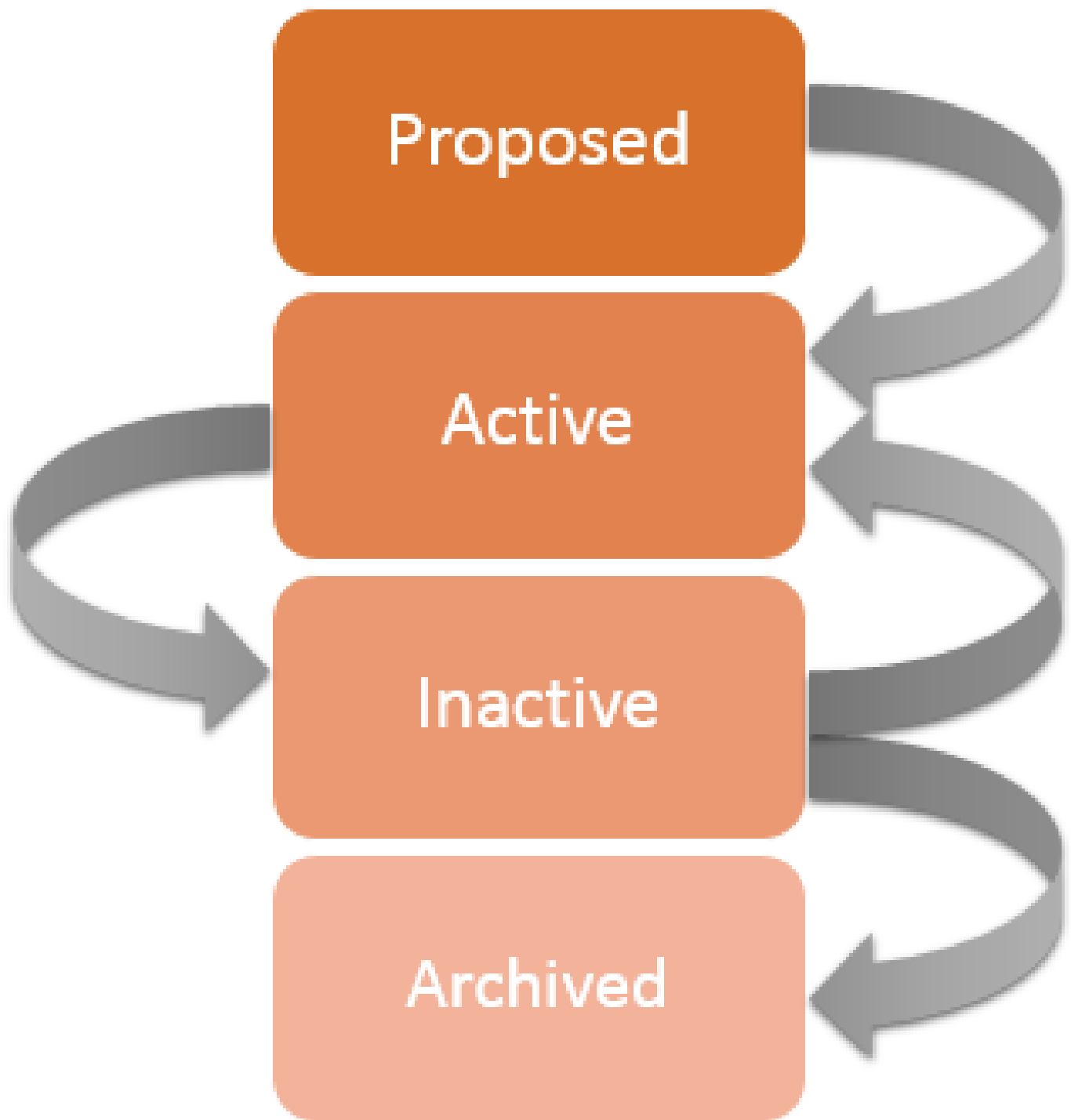
Course Code	Title	Workflow	Status
ACCTCY _0519	Accountancy Spring Intersession Study Abroad Program Fee	BUS Dean	Edited
ACCTCY 2010	Introduction to Accounting	BUS Dean	Edited
BIOL_EN 1000	Introduction to Biological Engineering		Edited
BIOL_EN 2000	Professional Development in Engineering	BIOL_EN Chair	Edited
ACCTCY 2027	Accounting II		
ACCTCY 2036	Accounting I		

The following statuses may appear (**Note: The following status names may be different in your implementation, such as *Modified* rather than *Edited***):

- **Added** — This status indicates that a New Course Proposal has been initiated for this course. Search for added courses to find course proposals that were saved but not submitted.
- **Edited** — This status indicates that a course that previously existed in the Student Information System has been edited.
- **Deactivated** — This status indicates that a course has been proposed to be made inactive or is currently inactive in the Student Information System.
- **Blank** — This indicates that the course exists in the Student Information System, but it is not in any CIM proposal process at this time. It is at rest.

Course Code Lifecycle

A Course Code (typically the subject code and course number) can be in one of four stages. It can be New, Active, Inactive, or Archived.



A New Course Code resides in CIM only until it has been fully approved and entered into the SIS, at which point it becomes Active. While a proposal is New, no other proposal may be created with the same Course Code. If a New proposal is shredded before reaching approval, no record of its existence will remain and the Course Code may be used again immediately.

An Active Course Code resides in CIM and your SIS. While a proposal is Active, no other proposal may have the same Course Code. If an Active proposal is edited, the edits in CIM will display with red/green markup. Those edits must be edited in the SIS in order to complete the approval process and set the course back at rest. If an Active edited proposal is shredded, the edits will be deleted and the course will be set back to its original content in CIM before the edit. An Active course may be proposed to be Inactive.

An Inactive Course Code may reside in CIM, in the SIS or both. Some institutions have Inactive Course Codes that are not sent in the nightly extract of course data. Most institutions do not allow editing of Inactive courses, but they will remain in the CIM search box with the designation *Deactivated* in the status field until that Course Code is Archived. If an institution allows editing of an Inactive course, when it is edited it will be Active in CIM and Inactive in the SIS until the edit is approved, at which time it will be Active in the SIS as well.

An Archived Course Code resides only in the SIS. Archived Course Codes may be used again for a New proposal. Codes are Archived manually though CourseLeaf support by removing the Course Code from the CIM search box. The CIM history of the Course Code is retained on disk, but it will no longer appear in search results. Archived Course Codes may not be unarchived; a New proposal must be started instead.

Field Types

Each CIM form is unique, but forms generally have the following field types:

- **Text field** - a field for entering plain text. This is one line of text (no line breaks or paragraphs) that may include numbers, letters, punctuation and special characters.
- **Text area field** - a larger text field that will allow for line breaks/paragraphs.
- **Formatted text field** - a field that allows for formatting with a Page Body Editor toolbar.
- **Drop down field** - a field that will allow a choice of one from a list of items. Drop down field values are controlled in CIM Code Management.
- **Radio Button** - a field that will allow (usually) one choice from a list of options, commonly used to answer Yes or No questions. Values beyond simply Yes and No are controlled in CIM Code Management.
- **Checkbox** - a field that will allow one or more choices from a list of options. Values are controlled in CIM Code Management.
- **Upload/Attachments** - a button that will allow the user to Upload a document.
 - Allowed document types may be customized, but generally allowed files are:
 - Image files (filenames ending in .gif, .jpg, .jpeg, or .png)
 - Movies or animations (filenames ending in .mov, or .swf)
 - Plain text files (filenames ending in .txt)
 - Microsoft Office files (filenames ending in .doc, .xls, .ppt, .xml, .docx, .xlsx, .rtf, .odt) *these may be limited per institution*
 - Adobe Portable Document Format files (.pdf)
 - Prohibited document types:
 - Courseleaf configuration files (filenames ending in .tcf, .tca, .tso)
 - Filenames with more than one '.' character
- **Multipart field** - a multipart field is made up of the above fields, but all of the fields are joined to make one entry. For instance, a multipart field might include a text field, a drop down field, and a check box. The multipart field would collect all of the pieces for one entry, then another entry of the same fields may be added by clicking the plus icon.
- **Course Picker** - a course picker allows the user to choose one or more courses from a course database. The course database may be made up of all courses in CIM or all active courses extracted from the SIS.

Overview

CIM courses allows users to propose a new course, propose edits to an existing course, or propose to delete/deactive an existing course. These proposals are then submitted through the appropriate workflow approval processes where users can edit, approve, or rollback the proposal. The CIM landing page allows a user to search for and view CIM Courses. From here, you can also see the status of a course and whether or not it is in workflow. While courses in workflow can be modified through the workflow and approval process, they cannot be modified from the CIM landing page until they have completed workflow

How to Propose a New Course

1. Click Propose New Course
2. Complete the form by filling in required information
3. After completing the form, click one of the following:
 - **Cancel** to not save any changes and return to the previous window
 - **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking Save Changes does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses
 - **Admin Save** to save and submit all changes but bypass workflow. Selecting Admin Save may be useful when there is something simple like updating a typo that won't need to go through workflow for approval. This button is only available to users with administrator access.
 - **Save & Submit (Start Workflow)** 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 workflow. The next user in workflow will be sent an automated email to notify the user the new course proposal is ready to be reviewed, edited, approved, or rejected.

How to Propose an Edit to a Course

(Your institution may be using a word other than Edit for this function. Some other common names for this form and corresponding button are Modify and Update.)

1. Type the field of study abbreviation, course title, or course code that you want to edit into the search field
2. Select the course that you wish to edit from the results window
3. Click the Edit Course button in the CIM window. Some of the fields in this form will be pre-populated with text
4. Make your updates to the form
5. After editing the form, click one of the following:
 - **Cancel** to not save any changes and return to the previous window
 - **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking Save Changes does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses
 - **Admin Save** to save and submit all changes but bypass workflow. Selecting Admin Save may be useful when there is something simple like updating a typo that won't need to go through workflow for approval. This button is only available to users with administrator access.
 - **Save & Submit (Start Workflow)** 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 workflow. The next user in workflow will be sent an automated email to notify the user the new course proposal is ready to be reviewed, edited, approved, or rejected.

How to Propose to Deactivate a Course

(Your institution may be using a word other than Deactivate for this function. Some other common names for this form and corresponding button are Delete and Drop.)

1. Type the field of study abbreviation, course title, or course code that you want to deactivate into the search field
2. Select the course that you want to deactivate from the results window
3. Click the Deactivate button
4. Complete the form
5. Click Submit to submit the request or Cancel to cancel the request

Overview

CIM Programs appear in the catalog similarly to shared content. In the page body editor the program information is surrounded by a blue box and is unable to be edited in the page body editor. On the Catalog page, when the toolbars are visible, the CIM program is viewed in a gray box and a link appears in the top right corner of the box that opens the program edit form.

How to Propose a New Program

1. Click the Propose New Program
2. Complete the form by filling in required information
 - Some fields will use the page body editor to format text and tables. Please see the help page on the Page Body editor for more information.
3. After completing the form, click one of the following:
 - **Cancel** to not save any changes and return to the previous window
 - **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking Save Changes does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses
 - **Admin Save** to save and submit all changes but bypass workflow. Selecting Admin Save may be useful when there is something simple like updating a typo that won't need to go through workflow for approval. This button is only available to users with administrator access.
 - **Save & Submit (Start Workflow)** 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 workflow. The next user in workflow will be sent an automated email to notify the user the new course proposal is ready to be reviewed, edited, approved, or rejected.

Note: Proposed New Programs will not appear in the Catalog Program Requirements selection list until the program has been approved. New programs must also be added to a catalog page separately to display in the catalog. See Adding New Programs to the Catalog for steps to add a new program to the catalog.

How to Propose an Edit to a Program

1. Search for the program to edit
2. Select the Program to edit, then click Edit Program

- Please visit the following pages for information about how to use the page body editor to update tables (p. 18).
- After completing the form, click one of the following:
 - **Cancel** to not save any changes and return to the previous window
 - **Save Changes** to save any changes that have been made and come back to the form at a later time. Clicking Save Changes does not submit the proposed changes to workflow and will allow you to save without filling out all the required fields. The status of the saved form will be "Added" and may be edited at a later time by searching for the course or doing a quick search for all added courses
 - **Admin Save** to save and submit all changes but bypass workflow. Selecting Admin Save may be useful when there is something simple like updating a typo that won't need to go through workflow for approval. This button is only available to users with administrator access.
 - **Save & Submit (Start Workflow)** 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 workflow. The next user in workflow will be sent an automated email to notify the user the new course proposal is ready to be reviewed, edited, approved, or rejected.

Note: CIM programs that are being edited will display in the next environment with the proposed edits. When publishing to the live site, programs that have not been approved will display the last approved version of the program; therefore, it is essential that programs be approved in CIM to display in the public catalog.

How to Propose to Deactivate a Program

(Your institution may be using a word other than Deactivate for this function. Some other common names for this form and corresponding button are Delete and Drop.)

- Search for the program that you want to deactivate
- Select the program that you want to deactivate from the results window
- Click the Deactivate button
- Complete the form
- Click Submit to submit the request or Cancel to cancel the request

How to Add New Programs to the Catalog

- Verify that the new program has been submitted and approved. Only approved programs will appear to be added to the catalog
- Navigate to the catalog page that will hold the new program information. A new page may need to be created. See Create a Page for steps to creating a page
- Open the page body editor and place the cursor where the new program should be placed
- Click the Insert/Edit Formatted Table tool, then select Program Requirements from the drop-down list
- Select the new program from the Program Requirements list, then click OK
- Click OK in the page body editor to save the page

Note: If the new program does not appear in the Program Requirements list, it may not be completely approved. See Proposing New Programs in CIM.

Search and View

Overview

There are several different ways to search for a course. Keep in mind that an asterisk is a wildcard and can be used at any place within your search terms to stand in for missing information. Searching on just an asterisk will return all courses in CIM.

- Course Code or Program Code
 - BIOL 115 will return BIOL 115
- Keyword
 - Physics will return any course with Physics in the title
- Keyword plus asterisk
 - *physic* will return Biophysics, Physical Education, and anything else with physic in the title
- Step in workflow (seen in the workflow column of the landing page)
 - ACCTCY Chair will return all courses currently at the ACCTCY Chair step in workflow
- Status (seen in the status column of the landing page)
 - edited will return all courses being edited
- Quick Search
 - Drop down menu of search options located in the upper right corner of the landing page

How to Search

1. Navigate to your CIM Courses or Programs landing page
2. Search on:
 - Course or Program Code
 - Keyword
 - Workflow Step
 - Status
3. Optionally, choose to search the archive and/or history. Archived course codes were codes used previously and are now able to be used again. History (p. 40) shows the proposal as it was previously approved with the date of approval in the Workflow column.
4. Press Enter on your keyboard or click Search

How to View the Proposal

The proposal can be viewed by clicking the proposal in the search box. To print the proposal, use the browsers print function, usually accessed by typing CTRL+P on Windows or Command-P on Apple.

Migrate Programs from CAT to CIM

Overview

There are two ways that programs can be migrated into CIM; first, Leepfrog can migrate them for you. We are happy to do this, but it will require ample time for collecting the information and completing the process. This option requires that you fill in a spreadsheet outlining the migration mapping. Once we have the spreadsheet, a migrator will use the spreadsheet data to migrate your programs. Leepfrog will do an initial check to ensure data accuracy, but this method will require that you also review the work of our migrator for accuracy.

Alternatively, you can migrate your programs. Migrating programs from your catalog into CIM Programs involves just a few steps.

Before you Migrate

Before you begin migrating your programs, there are a few formatting and set up items that you'll want to look into:

Make sure that all of your program information is positioned together on your catalog page. All program content must be grouped together on your catalog pages. Remember, program information is information that needs to go through governance or through the workflow that has been set up for CIM programs. It is important to be conscientious of this when grouping information together and when selecting the program information to migrate.

Establish a coding scheme.

- CIM Programs require a Program Name and a Program Code.
- These values must be unique for each program, so be sure to have your coding scheme ready before migrating programs. This will help ensure that there are no duplicate program codes.

It is important to ensure that the New CIM Program box has all of the fields from your form that should be migrated. Contact CourseLeaf to ensure that all of the fields are available in the New CIM Program box.

Migrating Programs

1. Open the page body editor
2. Highlight all of the information you want to migrate including course lists, plan of study grids and text.
3. Click the Manage Selected Content tool
4. Select New CIM Program
5. Click OK
6. Enter information in all fields. (Fields may vary by institution.)
7. Click OK

The program information will now be surrounded by a blue box indicating that it is a CIM program. Click OK to save the page body. On the page, the information moved to the CIM program will be in a grey box. You may edit the CIM program by following the Edit link in that grey box.

Note: when a program is migrated to CIM it can only be edited through CIM Programs.

Placing CIM Programs in CAT

Overview

CIM Programs feed the catalog through structured content. When a program is edited this update is seamless, but when a new program is proposed or a program is deactivated, administrative action must be taken.

Handling Edited Programs

As soon as a program is edited in CIM the edits will be reflected in the editing view of the catalog and in the page body editor of any page the program is on.

The Approval screen and Show Differences tool will show the last *approved* CIM program. For this reason, it is recommended that CIM Programs be approved *before* CAT pages holding those programs are approved, if possible. Also, if programs changes are being proposed for a catalog that is not the catalog in the next environment (e.g.: proposal is for the 18-19 catalog, but the 16-17 catalog is in the next environment), those programs should not complete the approval process. Approved content will be published in the catalog regardless of effective catalog date.

Handling New Programs

When a new program is proposed in CIM, it does not yet live in the catalog. That program must be placed in the catalog. That may require creating a new page, a new page tab, and adding links (p. 12) to lists of program pages.

Note: the program must only be proposed to be placed into the next catalog. If the program is not approved, the CIM program content will not be published to the live catalog, but the page that it lives on and any text not in the CIM program that is approved will be published. It is recommended to put a CAT administrator in the CIM Programs workflow near the end to begin preparing the catalog for the new program.

How to Add New Programs to the Catalog

1. Navigate to the page in the catalog desired to insert the CIM Program. Use the page body editor for the tab that should hold the program.
2. Position the cursor where the program 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 Program Requirements
5. Select the CIM Program that was proposed and wish to input
6. Click OK
7. The CIM Program will appear in a blue box in the Page Body
8. Click OK to save changes

Handling Deactivated Programs

When a program is proposed to be deactivated in CIM, it may require other work in the catalog. It may require deleting a new page, removing tabs, and removing links (p. 12) from lists of program pages.

How to Find A CIM Program That Has Been Deactivated

Programs that are in the process of being deactivated will continue to appear in the CIM Programs search box. The program ecosystem will contain links to pages that house that program.

Once the program has completed deactivation workflow it will no longer be available to add to the catalog, but are not removed from the catalog page. Deactivated Programs that have completed workflow and are still in use by the catalog will be identified in the Accuracy Report (p. 32) on the catalog page and in the republish error list when using Republish Site, Republish Subdirectory or Refresh System.

How To Remove A CIM Program From A Page

1. Navigate to the page in the catalog that has the CIM Program. See the CIM Program ecosystem to find all possible pages. Click the page body editor for the tab that has the program.
2. Click on the blue box that has the CIM Program.
3. Press the delete button on your keyboard.
4. Click OK
5. The CIM Program will disappear from the Page Body editor
6. Click OK to save changes

CourseLeaf Section Scheduler (CLSS)

What Is CLSS?

CourseLeaf Section Scheduler (CLSS) streamlines how colleges and universities determine their class sections each term - everything from inputting, editing, validating, approving, and updating the sections.

CLSS Terminology

Section

A section is the most granular scheduling item. It is a particular course at a specific time with an instructor. For instance, *MATH 101 4:30 PM MWF with Dr. Smith* is a section. Sections may also be referred to as classes or offerings by some institutions.

Instance

The instance is the term being scheduled, usually a semester, quarter, or other series of time determined by the client. An instance may have multiple sessions (i.e. the first 5 weeks of an instance) or each session may be its own instance, depending on client preference.

Scheduling Unit

The scheduling unit is the group of courses that are scheduled together, usually a department, though it can be as granular as an individual offering or as broad as the entire institution.

Phases

Phases are periods of time determined by the client during scheduling for an instance that describes levels of authority to make changes. For instance, phases might be Plan, Proof and Publish. In the Plan phase anything in the schedule may be changed, in Proof, only instructors and enrollment can change, and in Publish nothing can be changed for a particular offering. For more information about Phases, see CLSS Phases and Modes.

Modes

There are two modes associated with CLSS: Design mode and Refine mode. During Design mode all changes to the schedule are held for a scheduling unit and validated at one time by clicking the Validate button. During Refine mode changes to offerings are validated and sent through workflow when each section is saved. For more information about Modes, see CLSS Phases and Modes.

Filter Criteria

Overview

Filters are used to drill down in the data and to create Rules.

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic

ALPHANUM

Alphanumeric

Filter Criteria

- Approved Section (p. 63)
- Course (p. 49)
- Meeting Pattern (p. 54)
- Multiple Instructors (p. 53)
- Overlapping Section (p. 64)
- Primary Instructor
- Room (p. 55)
- Section (p. 50)
- Session (p. 56)
- Sibling Section (p. 57)

Course

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Course

Course fields allow you to filter sections by the following pieces of information:

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
College Code	Course	SCBCRSE		
Department Code	Course	SCBCRSE		
Subject Code	Course	SCBCRSE		
Catalog Number	Course	SCBCRSE		
Course Number	Course	SCBCRSE		
Course Title	Course	SCBCRSE		
Valid Section Type Code	Course	SCRSCHED		
Attributes Code	Course	SCRATTR		

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
Career Code	Course	CRSE_OFFER		
College Code	Course	CRSE_OFFER		
Department Code	Course	CRSE_OFFER		
Subject Code	Course	CRSE_OFFER		
Catalog Number	Course	CRSE_OFFER		
Course Title	Course	CRSE_OFFER		
Valid Section Type Code	Course	CRSE_COMPONENT		
Primary Section Type Code	Course	CRSE_CATALOG		
Attributes Code	Course	CRSE_ATTR		

Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Section

Section fields allow you to filter sections by information placed in the fields listed below.

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
Course Code	Section	SSBSECT		
Prior Enrollment	Section	SSBSECT		
Wait Cap	Section	SSBSECT		

Cross-list Maximum	Section	SSBXLST		Crosslist Maximum is not automatically the sum of each section's enrollment.
Status	Section	SSBSECT		
Inst. Method	Section	SSBSECT		
Integ. Partner Code	Section	SSBSECT		
Section #	Section	SSBSECT		
Schedule Print	Section	SSBSECT		
Consent	Section	SSBSECT		
Section Type	Section	SSBSECT		
Campus	Section	SSBSECT		
Grade Mode	Section	SSBSECT		
Cross-list Section	Section	CLSS	@, NONE, #	Numeric value. Less than 0 means find sections that are not crosslisted. If 0 find sections that are controlling cross listed sections. If its greater than 0, find sections that are controlled cross listed sections.
Linked Section	Section	CLSS	@, NONE, #	Find sections where Any Sections is selected in the Link To Field , NONE will find sections where Not Linked to Other Sections is selected, MULTI will find sections where Specific Sections is selected. NUM will find sections where any of the specific section number listed are selected.
Instructor ID	Section	CLSS		This must be a CLSS ID, not a name or single sign-on user ID.
CLSS ID	Section	CLSS		
CRN	Section	SSBSECT		
Scheduling Unit	Section	CLSS		
Scheduling Unit	Section	CLSS		Must be CLSS ID, not a name or single sign on user ID.
Section Text	Section	SSRTEXT or SSBDESC		
Comments	Section	CLSS		
Title	Section	SSBSECT		Only use this field to filter if the section you're filtering for has a different title than the course it goes with.
Credit Hrs	Section	SSBSECT		Use this field to look for MAX hours. No variable credit.
Attributes Code	Section	SSRATTR		
Enrollment	Section	SSBSECT		Actual enrollment for section. Default is 0 until registration starts.
Maximum Enrollment	Section	SSBSECT		

Projected Enrollment	Section	SSBSECT	Anticipated or desired enrollment for this section. Optional field that defaults to 0 when section is created.
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PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
SIS ID	Section	CLASS_TBL		
Course Code	Section	CLASS_TBL		
Rm Cap Request	Section	CLASS_TBL		
Wait Cap	Section	CLASS_TBL		
Cross-list Maximum	Section	SCTN_CMBND_TBL		Crosslist Maximum is not automatically the sum of each section's enrollment.
Cross-list Projected	Section	SCTN_CMBND_TBL		
Cross-list Wait Cap	Section	SCTN_CMBND_TBL		
Cross-list Rm Cap Request	Section	SCTN_CMBND_TBL		
Status	Section	CLASS_TBL		
Inst. Method	Section	CLASS_TBL		
Section #	Section	CLASS_TBL		CLSS field. Numeric value. Less than 0 means find sections that are not crosslisted. If 0 find sections that are controlling cross listed sections. If its greater than 0, find sections that are controlled cross listed sections.
Schedule Print	Section	CLASS_TBL		
Consent	Section	CLASS_TBL		
Section Type	Section	CLASS_TBL		
Campus	Section	CLASS_TBL		
Grade Mode	Section	CRSE_CATALOG		
Cross-list Section	Section	CLSS	@, NONE, #	Numeric value. Less than 0 means find sections that are not crosslisted. If 0 find sections that are controlling cross listed sections. If its greater than 0, find sections that are controlled cross listed sections.
Linked Section	Section	CLSS	@, NONE, #	Find sections where Any Sections is selected in the Link To Field , NONE will find sections where Not Linked to Other Sections is selected, MULTI will find sections where Specific Sections is selected. NUM will find sections where any of the specific section number listed are selected.
Instructor ID	Section	CLSS		This must be a CLSS ID, not a name or single sign-on user ID.
CLSS ID	Section	CLSS		
Scheduling Unit	Section	CLSS		

Scheduling Unit	Section	CLSS	Must be CLSS ID, not a name or single sign on user ID.
Comments	Section	CLSS	
Notes	Section	CLASS_NOTES	
Topic	Section	CLASS_TBL	Only use this field to filter if the section you're filtering for has a different title than the course it goes with.
Credit Hrs	Section	CRSE_CATALOG or CLASS_ASSOC	Variable credit can be entered into this field.
Attributes Code	Section	CLASS_ATTRIBUTE	
Enrollment	Section	CLASS_TBL	Actual enrollment for section. Default is 0 until registration starts.
Maximum Enrollment	Section	CLASS_TBL	

Multiple Instructors

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Multiple Instructors

Multiple Instructor fields allow you to filter sections by the following pieces of information:

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
ID	Multiple Instructors	SPRIDEN		
Display Name	Multiple Instructors	SPRIDEN		
First Name	Multiple Instructors	SPRIDEN		
Last Name	Multiple Instructors	SPRIDEN		
Role Code	Multiple Instructors	SIRASGN		
% Responsible	Multiple Instructors	SIRASGN		

PeoleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
ID	Multiple Instructors	NAMES		
Display Name	Multiple Instructors	NAMES		
First Name	Multiple Instructors	NAMES		
Last Name	Multiple Instructors	NAMES		
Role Code	Multiple Instructors	CLASS_INSTR		
% Responsible	Multiple Instructors	CLASS_INSTR		

Meeting Pattern

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

notsched or ns	Not Scheduled
dnm	Does Not Meet
tbd	To Be Determined
Not Supported	meeting pattern cannot be represented in CLSS

Meeting Pattern

Meeting Pattern fields allow you to filter sections by the following pieces of information:

Filter Field	Filter	Data Location	Keywords	Consideration
Name	Meeting Pattern	CLSS		The name of the meeting pattern with M-F and time designation (i.e., TTh 9:30am-10:50am). This is where you should search for particular dates and times regardless of meeting patterns. (i.e. All Tuesday Thursday courses would be found by TTh*)
Total Minutes	Meeting Pattern	CLSS		The total number of minutes the section meets per week.

Attributes	Meeting Pattern	CLSS	A verified duration that is configured and assigned a name in /wen/meeting-patterns/
Overlapping Attributes	Meeting Pattern	CLSS	Find sections that overlap a specific attribute
Starts In Attributes	Meeting Pattern	CLSS	Find sections that start within a time frame associated with a specific attribute.
Contained by Attributes	Meeting Pattern	CLSS	Find sections that are completely contained within the time frame associated with a specific attribute.
Containing Attributes	Meeting Pattern	CLSS	Find sections that are not contained within the time frame associated with a specific attribute.

Room

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Rooms Group Field:

SHARED	General Purpose Classroom
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Room

Room fields allow you to filter sections by the following pieces of information:

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
ID	Room	SLBRDEF		
Name	Room	SLBRDEF		
Building	Room	SLBRDEF		
Room	Room	SLBRDEF		
Department Code	Room	SCBCRSE		
Group	Room	CLSS	SHARED	

Group	Room	CLSS	SHARED
Capacity	Room	SLBRDEF	
Max Capacity	Room	SLBRDEF	
Min Capacity	Room	SLBRDEF	

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
ID	Room	FACILITY_TBL		
Name	Room	FACILITY_TBL		
Building	Room	FACILITY_TBL		
Room	Room	FACILITY_TBL		
Department Code	Room	CRSE_OFFER		
Group	Room	CLSS	SHARED	
Group	Room	CLSS	SHARED	
Capacity	Room	FACILITY_TBL		
Room Attributes	Room	CLASS_CHRSTC		
Max Capacity	Room	FACILITY_TBL		
Min Capacity	Room	FACILITY_TBL		

Session

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Session

Session fields allow you to filter sections by the following pieces of information:

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
College Code	Session	SESSION_TBL		
Department Code	Session	SESSION_TBL		

Sibling Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Sibling Section

The Sibling Section fields allow you to look for sections that have a sibling section with that attribute. Sibling sections are sections that have the same course code and Link To field. Linked sections, such as a Lecture and Lab, are also siblings with each other.

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
CLSS ID	Sibling Section	CLSS		This is an internal number used by CLSS, not the same as the SIS ID.
Title	Sibling Section	SSBSECT		Must be CLSS ID, not a name or single sign on user ID.
Section Type Code	Sibling Section	SSBSECT		
Campus Code	Sibling Section	SSBSECT		
Inst. Method Code	Sibling Section	SSBSECT		
Integ. Partner Code	Sibling Section	SSBSECT		
Schedule Print Code	Sibling Section	SSBSECT		

Consent Code	Sibling Section	SSBSECT	CLSS field. Numeric value. Less than 0 means find sections that are not crosslisted. If 0 find sections that are controlling cross listed sections. If its greater than 0, find sections that are controlled cross listed sections.	
Credit Hrs	Sibling Section	SSBSECT		
Grade Mode Code	Sibling Section	SSBSECT		
Maximum Enrollment	Sibling Section	SSBSECT		
Instructor ID	Sibling Section	CLSS	This must be a CLSS ID, not a name or single sign-on user ID.	
Projected Enrollment	Sibling Section	SSBSECT		
Wait Cap	Sibling Section	SSBSECT		
Cross-list Maximum	Sibling Section	SSBXLST		
Comments	Sibling Section	CLSS		
Room ID	Sibling Section	SLBRDEF		
Section #	Sibling Section	SSBSECT		
Status Code	Sibling Section	SSBSECT		
Meeting Pattern	Sibling Section	CLSS	notsched, dnm, ns, tbd	
Meeting Pattern	Sibling Section	CLSS	notsched, dnm, ns, tbd	
Session Code	Sibling Section	SSBSECT		
Cross-list Section	Sibling Section	CLSS	@, NONE, #	
Linked Section	Sibling Section	CLSS	@, NONE, #	The section that is the base offering of the course (i.e. Lecture).

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
CLSS ID	Sibling Section	CLSS		This is an internal number used by CLSS, not the same as the SIS ID.
Topic	Sibling Section	CLASS_TBL		
Section Type Code	Sibling Section	CLASS_TBL		
Campus Code	Sibling Section	CLASS_TBL		
Inst. Method Code	Sibling Section	CLASS_TBL		
Schedule Print Code	Sibling Section	CLASS_TBL		
Consent Code	Sibling Section	CLASS_TBL		
Credit Hrs	Sibling Section	CRSE_CATALOG or CLASS_ASSOC		
Grade Mode Code	Sibling Section	CRSE_CATALOG		
Maximum Enrollment	Sibling Section	CLASS_TBL		
Instructor ID	Sibling Section	CLSS		This must be a CLSS ID, not a name or single sign-on user ID.
Wait Cap	Sibling Section	CLASS_TBL		
Rm Cap Request	Sibling Section	CLASS_TBL		
Cross-list Maximum	Sibling Section	SCTN_CMBND_TBL		
Cross-list Projected	Sibling Section	SCTN_CMBND_TBL		
Cross-list Wait Cap	Sibling Section	SCTN_CMBND_TBL		
Cross-list Rm Cap Request	Sibling Section	SCTN_CMBND_TBL		
Comments	Sibling Section	CLSS		

Room ID	Sibling Section	FACILITY_TBL		
Section #	Sibling Section	CLASS_TBL		
Status Code	Sibling Section	CLASS_TBL		
Meeting Pattern	Sibling Section	CLSS	notsched, dnm, ns, tbd	
Meeting Pattern	Sibling Section	CLSS	notsched, dnm, ns, tbd	
Session Code	Sibling Section	CLASS_TBL		
Cross-list Section	Sibling Section	CLSS	@, NONE, #	
Linked Section	Sibling Section	CLSS	@, NONE, #	The section that is the base offering of the course (i.e. Lecture).

Linked Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Linked Parent and Linked Child Sections

The Linked Parent and Child Section fields allow you to look for sections that have a sibling section with that attribute. Sibling sections are sections that have the same course code and Link To field. Linked sections, such as a Lecture and Lab, are also siblings with each other.

Filter Field	Banner Location	PeopleSoft Location	Keywords	Notes
Course Code	SSBSECT	CLASS_TBL		
Section #	SSBSECT	CLSS_TBL		
Scheduling Unit				Data resides in CLSS.
Title/Topic	SSBSECT	CLASS_TBL		Only use this field to filter if the section you're filtering for has a different title than the course it goes with.

Credit Hrs	SSBSECT	CRSE_CATALOG or CLASS_ASSOC	Use this field to look for MAX hours. No variable credit.
Attributes Code	SSRATTR	CLASS_ATTRIBUTE	
Enrollment	SSBSECT	CLASS_TBL	Actual enrollment for section. Default is 0 until registration starts.
Maximum Enrollment	SSBSECT	CLASS_TBL	
Projected Enrollment	SSBSECT		Anticipated or desired enrollment for this section. Optional field that defaults to 0 when section is created.
Prior Enrollment	SSBSECT		
Rm Cap Request		CLASS_TBL	
Wait Cap	SSBSECT	CLASS_TBL	
Cross-list Maximum	SSBXLST	SCTN_CMBND_TBL	Crosslist Maximum is not automatically the sum of each section's enrollment.
Cross-list Projected		SCTN_CMBND_TBL	
Cross-list Wait Cap		SCTN_CMBND_TBL	
Cross-list Rm Cap Request		SCTN_CMBND_TBL	
Status	SSBSECT	CLASS_TBL	
Inst. Method	SSBSECT	CLASS_TBL	
Integ. Partner Code	SSBSECT		
Schedule Print	SSBSECT	CLASS_TBL	
Consent	SSBSECT	CLASS_TBL	
Section Type	SSBSECT	CLASS_TBL	
Campus	SSBSECT	CLASS_TBL	
Grade Mode	SSBSECT	CRSE_CATALOG	
Cross-list Section		@, NONE, #	Data resides in CLSS. Numeric value. Less than 0 means find sections that are not cross-listed. If 0, find sections that are controlling cross-listed sections. If it is greater than 0, find sections that are controlled cross- listed sections.
Linked Section		@, NONE, #	Data resides in CLSS. Find sections where Any Sections is selected in the Link To Field , NONE will find sections where Not Linked to Other Sections is selected, MULTI will find sections where Specific Sections is selected. NUM will find sections where any of the specific section number listed are selected.
Instructor ID			Data resides in CLSS. This must be a CLSS ID, not a name or single sign-on user ID.
Instructor Count			Data resides in CLSS.
Meeting Count			Data resides in CLSS.
CLSS ID			Data resides in CLSS.
SIS ID		CLASS_TBL	

Room Attributes		
Room Attributes Count		
Comments		Data resides in CLSS.
Notes	SSRTEXT or SSBDESC	CLASS_NOTES

Cross-list Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Cross-list Parent and Cross-list Child Sections

The Cross-list Parent and Child Section fields allow you to look for sections that have a sibling section with that attribute. Sibling sections are sections that have the same course code and Link To field. Linked sections, such as a Lecture and Lab, are also siblings with each other.

Filter Field	Banner Location	PeopleSoft Location	Keywords	Notes
Course Code	SSBSECT	CLASS_TBL		
Section #	SSBSECT	CLSS_TBL		
Scheduling Unit				Data resides in CLSS.
Title/Topic	SSBSECT	CLASS_TBL		Only use this field to filter if the section you're filtering for has a different title than the course it goes with.
Credit Hrs	SSBSECT	CRSE_CATALOG or CLASS_ASSOC		Use this field to look for MAX hours. No variable credit.
Attributes Code	SSRATTR	CLASS_ATTRIBUTE		
Enrollment	SSBSECT	CLASS_TBL		Actual enrollment for section. Default is 0 until registration starts.
Maximum Enrollment	SSBSECT	CLASS_TBL		

Projected Enrollment	SSBSECT		Anticipated or desired enrollment for this section. Optional field that defaults to 0 when section is created.
Prior Enrollment	SSBSECT		
Rm Cap Request		CLASS_TBL	
Wait Cap	SSBSECT	CLASS_TBL	
Cross-list Maximum	SSBXLST	SCTN_CMBND_TBL	Crosslist Maximum is not automatically the sum of each section's enrollment.
Cross-list Projected		SCTN_CMBND_TBL	
Cross-list Wait Cap		SCTN_CMBND_TBL	
Cross-list Rm Cap Request		SCTN_CMBND_TBL	
Status	SSBSECT	CLASS_TBL	
Inst. Method	SSBSECT	CLASS_TBL	
Integ. Partner Code	SSBSECT		
Schedule Print	SSBSECT	CLASS_TBL	
Consent	SSBSECT	CLASS_TBL	
Section Type	SSBSECT	CLASS_TBL	
Campus	SSBSECT	CLASS_TBL	
Grade Mode	SSBSECT	CRSE_CATALOG	
Cross-list Section		@, NONE, #	Data resides in CLSS. Numeric value. Less than 0 means find sections that are not cross-listed. If 0, find sections that are controlling cross-listed sections. If it is greater than 0, find sections that are controlled cross-listed sections.
Linked Section		@, NONE, #	Data resides in CLSS. Find sections where Any Sections is selected in the Link To Field, NONE will find sections where Not Linked to Other Sections is selected, MULTI will find sections where Specific Sections is selected. NUM will find sections where any of the specific section number listed are selected.
Instructor ID			Data resides in CLSS. This must be a CLSS ID, not a name or single sign-on user ID.
Instructor Count			Data resides in CLSS.
Meeting Count			Data resides in CLSS.
CLSS ID			Data resides in CLSS.
SIS ID		CLASS_TBL	
Room Attributes			
Room Attributes Count			
Comments			Data resides in CLSS.
Notes	SSRTEXT or SSBDESC	CLASS_NOTES	

Approved Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Approved Section

Approved section information is the section information from SIS. The Approved Section filter will look for sections that have an approved section with that attribute. Approved sections are sections that have been approved, either because they were rolled when the SIS was rolled, or because the section has been approved and entered into the SIS through CLSS.

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
CLSS ID	Approved Section	CLSS		
Title	Approved Section	SSBSECT		
Section Type Code	Approved Section	SSBSECT		
Campus Code	Approved Section	SSBSECT		
Inst. Method Code	Approved Section	SSBSECT		
Integ. Partner Code	Approved Section	SSBSECT		
Schedule Print Code	Approved Section	SSBSECT		
Consent Code	Approved Section	SSBSECT		
Credit Hrs	Approved Section	SSBSECT		
Grade Mode Code	Approved Section	SSBSECT		
Maximum Enrollment	Approved Section	SSBSECT		
Instructor ID	Approved Section	CLSS		
Projected Enrollment	Approved Section	SSBSECT		
Wait Cap	Approved Section	SSBSECT		
Cross-list Maximum	Approved Section	SSBXLST		

Comments	Approved Section	CLSS	
Attributes	Approved Section	SCRATTR	
Multiple Instructors	Approved Section	CLSS	
Room ID	Approved Section	SLBRDEF	
Section Text	Approved Section	SSRTEXT or SSBDESC	
All Data	Approved Section	CLSS	
Section #	Approved Section	SSBSECT	
Status Code	Approved Section	SSBSECT	
Meeting Pattern	Approved Section	CLSS	notsched, dnm, ns, tbd
Session Code	Approved Section	SSBSECT	
Cross-list Section	Approved Section	CLSS	~, NONE, #
Linked Section	Approved Section	CLSS	~, NONE, #

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
CLSS ID	Approved Section	CLSS		
Topic	Approved Section	CLASS_TBL		
Section Type Code	Approved Section	CLASS_TBL		
Campus Code	Approved Section	CLASS_TBL		
Inst. Method Code	Approved Section	CLASS_TBL		
Schedule Print Code	Approved Section	CLASS_TBL		
Consent Code	Approved Section	CLASS_TBL		
Credit Hrs	Approved Section	CRSE_CATALOG or CLASS_ASSOC		
Grade Mode Code	Approved Section	CRSE_CATALOG		
Maximum Enrollment	Approved Section	CLASS_TBL		
Instructor ID	Approved Section	CLSS		
Wait Cap	Approved Section	CLASS_TBL		
Rm Cap Request	Approved Section	CLASS_TBL		
Cross-list Maximum	Approved Section	SCTN_CMBND_TBL		
Cross-list Projected	Approved Section	SCTN_CMBND_TBL		
Cross-list Wait Cap	Approved Section	SCTN_CMBND_TBL		
Cross-list Rm Cap Request	Approved Section	SCTN_CMBND_TBL		
Comments	Approved Section	CLSS		
Notes	Approved Section	CLASS_NOTES		
Attributes	Approved Section	CLASS_ATTRIBUTE		
Multiple Instructors	Approved Section	CLSS		
Room ID	Approved Section	FACILITY_TBL		
Room Attributes	Approved Section	CLASS_CHRSTC		
All Data	Approved Section	CLSS		
Section #	Approved Section	CLASS_TBL		
Status Code	Approved Section	CLASS_TBL		
Meeting Pattern	Approved Section	CLSS	notsched, dnm, ns, tbd	
Session Code	Approved Section	CLASS_TBL		
Cross-list Section	Approved Section	CLSS	~, NONE, #	
Linked Section	Approved Section	CLSS	~, NONE, #	

Overlapping Section

Key Words and Symbol Definitions

Key words and symbols can be used individually or combined to limit and specify your search criteria.

Use in All Filter Fields:

Key	Description
!	Not
,	Match any of the items in the comma-separated list
=	Exact match, ignoring other special characters
?	One wild card character
*	0 or more wild card characters
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
::	Range
same	Field's value is the same as the corresponding field in another group
NUM	Numeric
ALPHA	Alphabetic
ALPHANUM	Alphanumeric

Use in Filters on This Page:

Key	Description
@	Any (i.e.: @LAB would find sections that will allow students to register for any lab)
NONE	
#	Multiple (i.e.: #LAB would find sections that will allow students to register for a number of different labs)

Overlapping Section

Overlapping sections are sections that are scheduled for overlapping days and times. The Overlapping Section filter will look for sections that have an overlapping section with that attribute. Overlapping sections are sections that meet at the same time. They may meet at exactly the same time, or one may run into another or one may start while another one is meeting.

Banner Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
Course Code	Overlapping Section	SSBSECT		
Wait Cap	Overlapping Section	SSBSECT		
Room ID	Overlapping Section	SLBRDEF		
Status	Overlapping Section	SSBSECT		
Schedule Print	Overlapping Section	SSBSECT		
Consent	Overlapping Section	SSBSECT		
Section Type	Overlapping Section	SSBSECT		
Campus	Overlapping Section	SSBSECT		
Grade Mode	Overlapping Section	SSBSECT		
Linked Section	Overlapping Section	CLSS	@, NONE, #	The section that is the base offering of the course (i.e. Lecture).
Instructor ID	Overlapping Section	CLSS		This must be a CLSS ID, not a name or single sign-on user ID.
Section #	Overlapping Section	SSBSECT		
CLSS ID	Overlapping Section	CLSS		An internal number used by CLSS, not the same as the SIS ID.
CRN	Overlapping Section	SSBSECT		
Scheduling Unit	Overlapping Section	CLSS		

Scheduling Unit	Overlapping Section	CLSS	
Title	Overlapping Section	SSBSECT	Unique titles for sections of courses. If no unique title exists, this field is empty.
Credit Hrs	Overlapping Section	SSBSECT	
Enrollment	Overlapping Section	SSBSECT	
Maximum Enrollment	Overlapping Section	SSBSECT	
Projected Enrollment	Overlapping Section	SSBSECT	
Prior Enrollment	Overlapping Section	SSBSECT	

PeopleSoft Filter Fields

Filter Field	Filter	Data Location	Keywords	Consideration
SIS ID	Overlapping Section	CLASS_TBL		
Course Code	Overlapping Section	CLASS_TBL		
Wait Cap	Overlapping Section	CLASS_TBL		
Room ID	Overlapping Section	FACILITY_TBL		
Status	Overlapping Section	CLASS_TBL		
Schedule Print	Overlapping Section	CLASS_TBL		
Consent	Overlapping Section	CLASS_TBL		
Section Type	Overlapping Section	CLASS_TBL		
Campus	Overlapping Section	CLASS_TBL		
Grade Mode	Overlapping Section	CRSE_CATALOG		
Linked Section	Overlapping Section	CLSS	@, NONE, #	The section that is the base offering of the course (i.e. Lecture).
Instructor ID	Overlapping Section	CLSS		This must be a CLSS ID, not a name or single sign-on user ID.
Section #	Overlapping Section	CLASS_TBL		
CLSS ID	Overlapping Section	CLSS		An internal number used by CLSS, not the same as the SIS ID.
Scheduling Unit	Overlapping Section	CLSS		
Scheduling Unit	Overlapping Section	CLSS		
Topic	Overlapping Section	CLASS_TBL		
Credit Hrs	Overlapping Section	CRSE_CATALOG or CLASS_ASSOC		
Enrollment	Overlapping Section	CLASS_TBL		
Maximum Enrollment	Overlapping Section	CLASS_TBL		

Framer Screen

Overview

The Framer provides a view of sections by instance. Historical data can be viewed in the Framer based on the information provided by your student information system (SIS). The back button (see circled arrow) can be clicked to show historical data.

View ▾

Filter

Export

	Spring 2015 (H)	Fall 2015 (H)	Spring 2016
VAD 211 Fund-Vis Comm Dsgn	1 LE (11)		1 LE (12)
VAD 215 Computr Appl- Design			
VAD 220 Design Processes I	1 LE (5)	2 LE (21)	2 LE (29)
VAD 240 Form and Concept		2 LE (21)	
VAD 245 Typography I	2 LE (20)		2 LE (18)
VAD 307 Drawing-Grphc Design			1 LE (20)
VAD 310 Computer Illustratn	1 LE (7)		1 LE (9)
VAD 312 Visual Form			

View Options

There are three different views for section information. You can toggle between them by clicking the View pull-down tab.

1. **Summary** view gives a snapshot of each section with the number of sections offered, student count (as reported to SIS), and delivery method information.
2. **Standard** view provides the summary information and instructor name.
3. **Detail** view provides the standard information and the day and time offered.
4. **Customize** view will allow you to choose the instances and the number of columns to view.

Selecting an instructor name from the **Standard** or **Detail** view, causes a new window to populate with historical data specific to that instructor.

How to Duplicate a Section from Another Instance

1. Navigate to your CLSS landing page
2. Select an instance
3. Select a scheduling unit
4. Click framer
5. Click the View drop down button and select standard or detail
 - Standard - summary information and instructor name
 - Detail - standard information and the day and time offered
6. Hover over a previous instance's section
 - The section will be surrounded by a red box.
7. Click on the red box to duplicate the available information from this section for the current instance
 - *Note: The duplicated section will attempt to include all available information from the original section, such as instructor and times.*
 - *Unavailable items will not be duplicated, such as if the instructor is no longer able to teach in that instance.*
8. Make any changes to the section in the Edit section dialog box. To edit the schedule, click the blue calendar link under the schedule to reveal the Snapper (p. 76).
9. Click Save Section

10. Notice any error messages or warnings and follow stated instructions

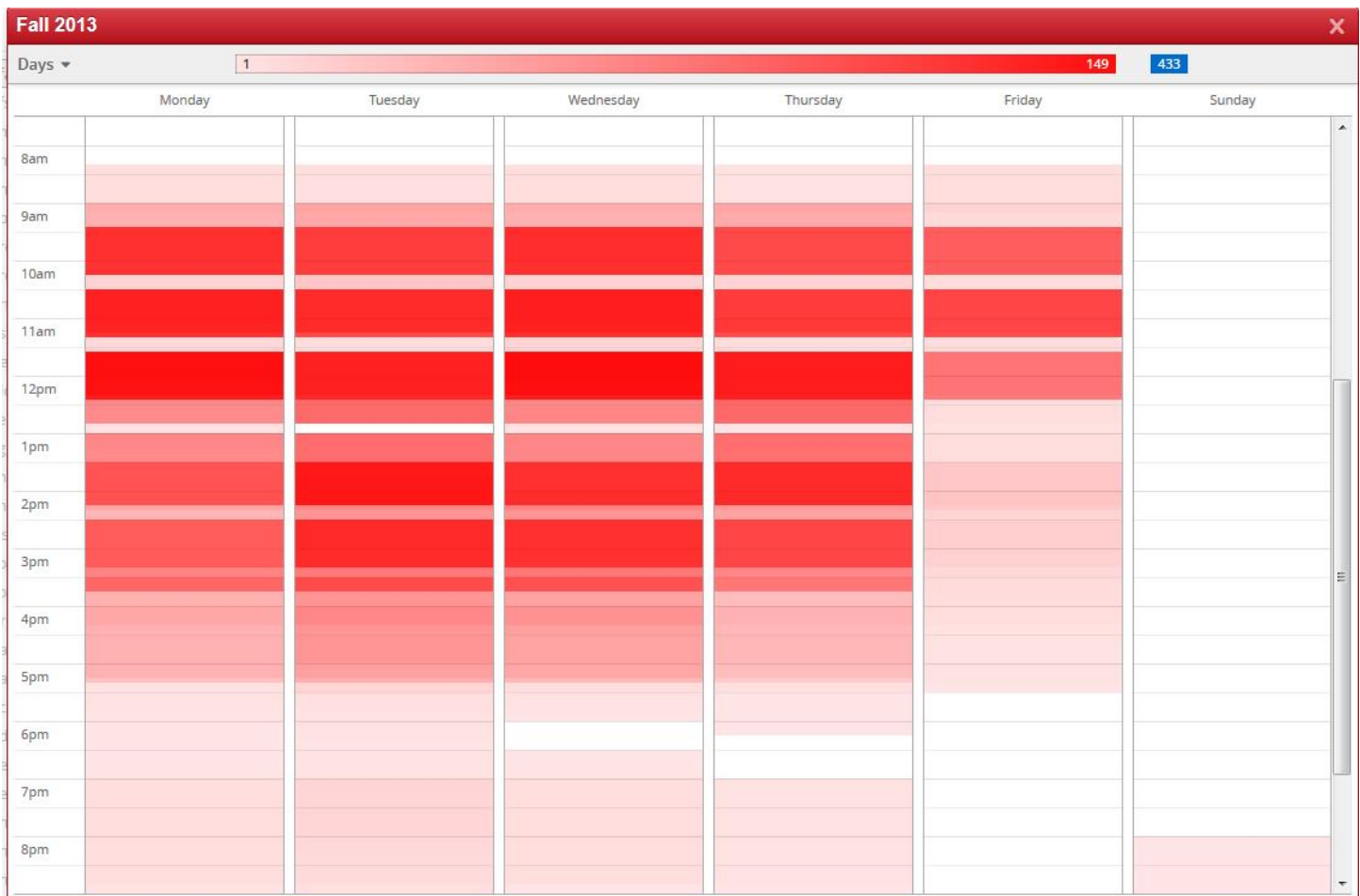
How to Create a New Section

1. Navigate to your CLSS landing page
2. Select the instance currently open for editing in the far left column
3. Click the Add section box to reveal the Edit section dialog box
4. Fill in all available fields
5. Click the blue calendar link to reveal the Snapper (p. 76) to schedule the section

Heat Map Screen

Overview

Heat maps provide a visual representation of the number of sections in a scheduled week. Deepening shades of red represent the number of sessions scheduled for a specific time slot. The heat map can be used from the instance, scheduling unit, or offering screens when the Visualize indicator or flame icon is present. Hovering over the heat map will reveal the number of offerings for that time. Clicking within the heat map will reveal a detailed description of offerings during that time.



How to Access the Heat Map

1. Navigate to the CLSS Instances screen
2. Select an instance
3. Click visualize to see a heat map that includes all of the scheduling units
Or
Select a scheduling unit and then click visualize to see a heat map of just that scheduling unit

Instances Screen

Overview

An Instance is a specific term, as defined by your institution. Common instances are semesters, trimesters, quarters, or unique sessions that fall beyond the normal academic calendar.

The hierarchy within CLSS is Instance, Scheduling Unit, Course sections. Instances house scheduling units and scheduling units house sections. All permissions, rules and reports are applied to instances, and more fine-tuning of permissions and rules are made at the scheduling unit level.

How to Access Instances

1. Navigate to the CLSS Instances screen by adding /wen/ to the end of your NEXT catalog URL.
2. Click to open an instance

Modifying the Instances Screen

Edit the Text and Titles

1. Navigate to the instance screen (/wen)
2. Click Edit Text/Titles
3. Edit the text in the text boxes that appear
4. Click Save

Moving Groups of Instances

1. Navigate to the instance screen (/wen)
2. Click Move Groups
3. Click and drag a group within the instance screen
4. Click Save

Note: Groups that do not contain instances will be deleted when the page is refreshed.

Moving Instances

1. Navigate to the instance screen (/wen)
2. Click Move Instances
3. Click and drag an instance from one group to another group
4. Click Save

Creating New Groups

1. Navigate to the instance screen (/wen)
2. Click New Group (a New Untitled Group will appear)
3. Click Edit Text/Titles then edit the title for the new group
4. Click Save
5. Click Move Instances then drag instances to the new group
6. Click Save
7. Click Move Groups
8. Drag the group to the appropriate area in the instance screen.

Note: Groups that do not contain instances will be deleted when the page is refreshed.

Adding Notes to the Instance Screen

1. Navigate to the instance screen (/wen)
2. Click Edit Text/Titles
3. Add text to the box at the top of the screen. The following markdown may be used to format this text:
 - **asterisks** to make text italics
 - ****asterisks**** to make text bold
 - *** for a bulleted list
 - number. (e.g.: 1.) for a numbered list

- links are recognized when starting with http:// or https://
4. Click Save. These notes are immediately viewable by all users.

Scheduling Unit Screen

Overview

The scheduling unit screen provides a list of all courses and sections assigned to a scheduling unit. A scheduling unit is typically a department but can also be defined as a college, school, or individual course. Rules are applied either at the section level or the scheduling unit level. They are not applied on a sub-group of scheduling units collectively or on a collection of scheduling units collectively.

The scheduling unit screen can be used to add, edit, and remove sections from a course.

CourseLeaf/CLSS – Fall 2015 – Accounting

leefrog ? Log Out

25 Courses, 78 Sections

Plan Phase Design Mode

View By

- ✓ Course
- Instructor
- Day and Time

Validate Bridge Tools Visualize Filter Framer Export

Show courses with no sections

ACC 2301 – ACC IN ORG & SOCTY

Section	Type	Instructor	Time	Actions
001	LEC	Redwine, Gerald	MW 10am-10:50am	See CLS 3305-001
002	LEC	Krylova, Lyudmyla	MWF 8am-8:50am	
003	LEC	Staff	MWF 8am-8:50am	
004	LEC	Krylova, Lyudmyla	MWF 9am-9:50am	

- **View By** - view sections by course, instructor, or day and time
- **Expand All Arrows** - view all sections
- **Collapse All Arrows** - hide all sections
- **Plus Button** - Add Section
- **X Button** - Delete Section

Cross-listed sections (p. 71) will be indicated with a *See* or *Also* indicator to the far right of the section

Linked sections (p. 72) are indicated by a vertical line connecting parent sections to child sections

Multiple Instructors (p. 73) will list the primary instructor + a number indicating the additional instructors for that section

How to View or Edit a Section

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Click the View By button to choose to view by Course, Instructor or Day and Time
5. Double-click to view sections
6. Double-click a section to edit it with the Section Editor (p. 71)
7. Click Save, or click Close to close without saving

How to Add a New Section

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Click the View By button to choose to view by Course
5. Double-click to view sections
6. Click the plus button to the right of a course to add a section
7. Edit the section with the Section Editor (p. 71)
8. Click Save, or click Close to close without saving

How to Delete or Cancel a Section

1. Navigate to the CLSS Instances screen

2. Click to open an instance
3. Double click to open a scheduling unit
4. Click the View By button to choose to view by Course, Instructor or Day and Time
5. Double-click to view sections
6. Click the red X button to the left of the section
7. Click OK to confirm

Note: Sections may be deleted or canceled based on phase, mode and institution policies. In most cases, in Design Mode sections may be deleted and in Refine Mode sections will be canceled.

Note: Linked parent sections can not be deleted until all child sections are deleted.

How to Delete or Cancel All Sections of a Course

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Click the View By button to choose to view by Course
5. Double-click a course title to view sections for that course
6. Click the red X button to the right of the course (next to the plus button)
7. Click OK to confirm

Note: Sections may be deleted or canceled based on phase, mode and institution policies. In most cases, in Design Mode sections may be deleted and in Refine Mode sections will be canceled.

How to Validate and/or Submit a Scheduling Unit

A user may click the Validate button at any time to view the errors, warnings and workflows for the scheduling unit. The scheduling unit will not be submitted without taking the following steps.

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Click the Validate button.
5. Click one of the following buttons:
 - a. Click the Close button to return to editing without submitting. If there are errors, this will be the only available option.
 - b. Click the Submit Now button to submit the scheduling unit. This option will appear if there are only warnings or if the scheduling unit was valid.
 - c. Click the Start Workflow button to submit the scheduling unit through workflow. This option will appear if there were any rules that required workflow. Workflow will be completed before any data is moved to the SIS.

Section Editor

Overview

The Section Editor is used to edit information about the section. Each institution's Section Editor may be slightly different.

How to Open the Section Editor

1. Log into CLSS
2. Select an instance
3. Select a scheduling unit
4. Double click a section to open the section editor

Cross-Listed Sections

Overview

Cross-Listed Sections are sections that meet at the same time with the same instructor and room. One section is the controlling section which controls most of the information about the section. The other is the controlled section(s) which only controls information about the section that is unique to the cross-listed portion, such as cross-listed maximum enrollment.

How to Filter for Cross-Listed Sections

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Click on the filter button to open the filter tool
4. Click the Section heading
5. Enter ≥ 0 in the Cross-list Section field
 - CLSS gives an internal tracking number to each cross-listed section that is greater than or equal to zero
 - The number itself is not important, but if there is a number in that field, this filter will find it

How to Cross List Sections

A section can only give control of updates to another section, it can never take control. This means that when you add a cross list to one of your sections, the section added will have control of your section information. You can uncross list a section at any time whether you are the controlled section or the controlling section.

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Double click to open a course
5. Double click to select a section
6. Click Cross-list with and search for a subject code and number
7. Select the section you want to cross list with
8. Click Save Section

How to Uncross List Sections

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Double click to open a course
5. Double click to select a section
6. Click the red X next to the cross-listed section
7. Click Save Section

How to Edit Cross Listed Sections

- Only controlling sections can edit the majority of the information about a section.
- The controlled section will only be able to edit a limited number of fields.
- A section that is cross-listed will have a Cross-List Enrollment section and an Enrollment section.
 - The Cross-List Enrollment reflects the total number of seats in the sections when they are all together.
 - The Enrollment reflects the numbers for that section of the cross-listed group.

Linked Sections

Overview

The linked sections field allows you to link sections for registration. The ability to link sections within a course comes from SIS so if the course has not been set up within SIS to allow linking, there will be no option for linking within CLSS. Schools configure linked sections differently.

How to Filter for One Section Type to Many Section Types

One way to link sections is to link one section type to many other section types. An example of this would be to link one lecture section to many lab sections: BIOL 101 (Lecture) section 001 can take BIOL 103 (Lab) section 001, 002, or 003.

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Click on the filter button to open the filter tool
4. Click the Sections heading

5. Find the Linked Sections field
6. Enter !@LAB,NONE to look for all sections that are *not* coded as Any Lab (@LAB), or has no linking (NONE)

How to Filter for Any Section Type to Any Section Type

One way to link sections is to link any section type to any other section type. An example of this would be to link All lecture sections to all lab sections: BIOL 101 (Lecture) sections 001, 002, 003 can take any BIOL 103 (LAB) sections 001, 002, 003.

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Click on the filter button to open the filter tool
4. Click the Sections heading
5. Enter @LAB to look for all sections that are coded as Any Lab (@LAB)

How to Link, Edit, and Unlink Sections

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Double click to select a scheduling unit
4. Double click to open a course
5. Double click a section to open the editor
6. Click the link to drop down menu
7. Select an option:
 - **Not Linked** to Other Sections
 - **Any Section Type** (Lecture, Lab, etc.) - means the student can take any of the specified Section Type with this section. Usually on the Lab component of a Lecture/Lab link.
 - **Specific Section Type** (Lecture, Lab, etc.) - means the student must take one of a group of the specified Sections Type with this section. Usually on the Lecture component of a Lecture/Lab link.
 - **Section Numbers individually** - Usually on the Lab component of a Lecture/Lab link.
8. Click save section

Multiple Instructors

Overview

The multiple instructors field allows you to add multiple instructors to a section.

How to Filter for Multiple Instructors

This filter looks for all sections that have 0 or more characters in the Multiple Instructors ID field. This ID may not be the same as the Instructors actual ID.

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Click the filter button to open to filter tool
4. Click the Multiple Instructors heading
5. Enter * into the ID field

How to Add Multiple Instructors

1. Navigate to the CLSS instances screen
2. Select an instance
3. Select a scheduling unit
4. Double click a course to view sections
5. Double click a section to open the section editor
6. Click the instructor drop down menu and select multiple
7. Use the icon to add a new instructor
8. Other fields may also be available such as Role or % Responsible. Complete accordingly.

9. Use the up and down arrow icons to move the instructor that is in the classroom the most to the top with the blue star. When using the snapper, the conflicts in time will be shown for the instructor with the blue star.
10. Click accept
11. Click save section

Room Attributes

Overview

Room attributes are pulled into CLSS from your SIS and may be added to each section.

How to Add, Edit, and Remove Room Attributes

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to select a scheduling unit
4. Double click to open a course
5. Double click a section to open the editor
6. Set room to General Assignment Room
7. Click the Room Attributes pencil
8. Click the icon to add a new attribute
 - Use the drop down menu to select the attribute
9. Click the trashcan icon to remove an attribute
10. Click Accept
11. Click save section

Section Attributes

Overview

Section Attributes are pulled into CLSS from your SIS and can be added to each section.

Section Attributes

Attribute

ACT Credit

Correspondence

Humanities II Core

✕ Cancel

✓ Accept

How to Filter for Section Attributes

To filter for Section Attributes, you must know the section attributes codes for your institution. See your CourseLeaf CLSS administrator for more information.

How to Add, Edit, and Remove Section Attributes

1. Navigate to the CLSS Instances screen
2. Click to open an instance
3. Double click to select a scheduling unit
4. Double click to open a course

5. Double click a section to open the editor
6. Click the pencil icon to add or edit section attributes.
7. Click the plus icon to add a section attribute.
8. Choose the attribute from the dropdown.
9. Click the trash can icon to remove a section attribute.
10. Click save section

Section Editor Fields

Overview

The Section Editor is used to edit information about the section. Each institution's Section Editor may be slightly different.

Edit Section – VAD 220-01: Design Processes I (CRN: 5148)

Section Information

Title/Topic

Design Processes I (Default Value)

Section #

01

Credit Hrs

3

Section Type

Lecture

Session

Full Term

Campus

Main Campus

Status

Active

Grade Mode

(Default Value)

Section Attributes

None Selected

Instructor

Kwon, Suki

Room

FH238Q Computer Lab

Schedule

MW 9:05am-11:50am

Enrollment

0 current, 13 prior

Maximum

9

Projected

0

Wait Cap

0

Comments (Short Remarks)

Majors only

Internal Notes

Bridge Tools

Cancel

Save Section

How to Edit a Section

1. Navigate to the CLSS instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Double click to open a course
5. Double click to select a section
6. Fill in all appropriate fields
7. Click the blue link under Schedule to open the Snapper
8. Choose a meeting time
9. Make any necessary comments in the Comments field, especially if this section will require approval through workflow.
10. Click Save Section
11. Observe any errors or warnings and make additional edits as necessary.

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When a section is saved, if the scheduling unit is in Design mode, all sections will be validated at once. This section will not immediately go through workflow. If it is in Refine mode, the section will immediately trigger workflow, if necessary.

Section Notes/ Section Text

Overview

Section notes or Section text are displayed for students during registration.

How to Filter for Section Notes

1. Navigate to to the CLSS Instances screen
2. Click top open an instance
3. Click the filter button to open the filter tool
4. Click the Section heading
5. Find the Section Text or Section Notes field
6. Enter ?* to look for all sections that have one or more characters in the Sections Text or Section Notes field

How to Add, Edit, and Delete Section Notes

1. Navigate to to the CLSS Instances screen
2. Click to open an instance
3. Double click to open a scheduling unit
4. Click to open a course
5. Double click to select a section
6. Click the pencil icon next to Section Notes or Section Text
7. Enter text
 - a. **Note:** *The Section Text or Section Notes field does not have a spell check feature as codes are often entered here rather than normally spelled words.*
8. Click Save Section

Snapper Screen

Overview

The Snapper shows the section being scheduled and related sections. The Snapper is so named because when hovering over the time grid, the software will attempt to “snap” the section into a pre-defined, standard meeting time. The default view is all sections of the same course, but other courses of interest can also be added.

Scheduling – ACC 3313-003: INTERMED ACCT I (SIS ID: 10076)

Days ▾ Patterns ▾ ACC 3313-003 LEC LEC 001 LEC 002 LEC 004 LEC 005 LEC 006

Course Code Permanent Add

	Monday	Tuesday	Wednesday	Thursday	Friday
8am					
9am	M 9am-9:50am	ACC 3313-004 LEC		ACC 3313-004 LEC	
10am					
11am	ACC 3313-001 LEC	ACC 3313-005 LEC	ACC 3313-001 LEC	ACC 3313-005 LEC	
12pm					
1pm	ACC 3313-002 LEC	ACC 3313-006 LEC	ACC 3313-002 LEC	ACC 3313-006 LEC	
2pm					
3pm					
4pm					
5pm	ACC 3313-003 LEC 5p – 6:20p		ACC 3313-003 LEC 5p – 6:20p		
6pm					
7pm					
8pm					

Close Rooms Accept

How to Add a Section Meeting Time

- Hover over the calendar to see possible meeting times for the default meeting pattern.
 - To view all times available for a meeting pattern, hover over the View All tool (small boxes in grid in the top toolbar).
 - To view other possible patterns, click the Patterns dropdown and choose another pattern. Patterns are listed by order of preference for the scheduling unit.
 - To limit days to view, click the Days dropdown, then select or deselect days.
- Click a box to set the meeting time for that section. Continue hovering to view and choose other possible patterns. *Note: The red bar on the left of each column indicates when the selected primary instructor is already scheduled.*
- Click Accept to set the meeting time.

How to Propose a Meeting Pattern

A user-defined meeting time may be available, depending on the institution's implementation of CLSS. See your CLSS administrator for more information.

- In the Patterns dropdown, choose User Defined.
- In the Meeting Pattern Name text box at the bottom of the dropdown, enter the requested meeting pattern. Note: Meeting patterns must be formatted as follows: Day initial, space, start time, dash, end time. For instance, to propose meeting Monday and Thursday 8:00 am to 4:00 pm, enter "MT 8:00am-4:00pm". To add additional times per week, separate each one with a semi-colon (;) and space (e.g.: "M 8:00am-9:00am; T 9:00am-10:00am").
- Click Add to place the pattern on the snapper.

Note: In most cases, proposing a user defined meeting pattern will trigger a request to enter workflow. Take notice of errors and warnings and take action as instructed.

How To Propose a Meeting Pattern with Multiple Times/Rooms/Dates

(available in CourseLeaf CLSS 2.0 only)

Scheduling – ACCT 101-04: Accounting I (CRN: 24025)

Days ▾ Patterns ▾ ACCT 101-04 LEC LEC 01 LEC 02 LEC 03 LEC 05 LEC 06 LEC 07 LEC 08

	Monday	Tuesday	Wednesday	Thursday	Friday
8am	ACCT 101-06 LEC		ACCT 101-06 LEC		
9am					
10am	ACCT 101-07 LEC	ACCT 101-02 LEC	ACCT 101-07 LEC	ACCT 101-02 LEC	
11am	ACCT 101-08 LEC	ACCT 101-03 LEC	ACCT 101-08 LEC	ACCT 101-03 LEC	
12pm					
1pm					

Pattern	Type	Room	Dates
A. TTh 2pm-3:15pm	Lecture	Hariri 130	Using Session Dates
B. F 6:40pm-8:30pm	Lecture (Laboratory)	Hariri 155	Using Session Dates

Multiple meeting patterns with different rooms, types and dates may be entered using the Meetings button.

1. Click the Meetings button to view the Multiple Meeting viewbox.
2. Choose a meeting from the viewbox to view it in the snapper or click the plus icon to add a new meeting.
3. Hover over the calendar to see possible meeting times for the default meeting pattern.
 - a. To view all times available for a meeting pattern, hover over the View All tool (small boxes in grid in the top toolbar).
 - b. To view other possible patterns, click the Patterns dropdown and choose another pattern. Patterns are listed by order of preference for the scheduling unit.
 - c. To limit days to view, click the Days dropdown, then select or deselect days.
4. Click a box to set the meeting time for the meeting. Continue hovering to view and choose other possible patterns. *Note: The red bar on the left of each column indicates when the selected primary instructor is already scheduled.*
5. Click the Meeting button again to view the Multiple Meeting viewbox.
6. Click the pencil icon next to the meeting to edit, or click the trash icon to remove the meeting. *The pattern field will be greyed out. Select Accept and edit the pattern through the Snapper's calendar view.*

Meeting Details

Pattern

TTh 2pm-3:15pm

Type

Lecture

Room

Hariri 130

Leave the date fields blank to use the default session dates

Dates

to

✕ Cancel

✓ Accept

- Use the Meeting Details screen to edit the type, room or dates. *Dates should be entered in the format YYYY-MM-DD.*
- Click Accept.
- Click the X in the Meeting viewbox to hide the viewbox.
- Click Accept to set the Meeting Patterns.

Room Grid View

Room Grid					
	MWF 9am-9:50am	MWF 10am-10:50am	MWF 11am-11:50am	MWF 12pm-12:50pm	MWF 1pm-1:50pm
Lunt Hall 101		MATH 440-1-41 LEC	MATH 460-1-51 LEC	MATH 430-1-61 LEC	MATH 410-1-71 LEC
Lunt Hall 102		MATH 483-1-81 LEC	MATH 420-1-51 LEC	MATH 470-1-61 LEC	
Lunt Hall 103	MATH 354-1-31 LEC		MATH 311-1-51 LEC	MATH 351-0-61 LEC	MATH 224-0-71 LEC
Lunt Hall 104	MATH 310-1-31 LEC	MATH 220-0-41 LEC	MATH 310-1-51 LEC	MATH 381-0-61 LEC	MATH 320-1-73 LEC
Lunt Hall 105	MATH 300-0-31 LEC	MATH 202-0-41 LEC	MATH 517-1-51 LEC	MATH 291-1-61 LEC	MATH 321-1-71 LEC
Lunt Hall 107	MATH 230-0-31 LEC	MATH 331-1-41 LEC	MATH 230-0-53 LEC	MATH 285-1-61 LEC	MATH 300-0-73 LEC
MATH Lounge Rm 101 - 619 Emer					
MATH Seminar Rm - Lunt 216					

✕ Cancel

✓ Accept

The Room button displays the snapper with a room grid. Each room allocated to the scheduling unit appears on the left. The available meeting patterns for the section appear across the top. All sections in CLSS assigned to those allocated rooms appear in the grid.

The purple sections are those that have the same meeting pattern as the meeting pattern. Sections in red are those that overlap that meeting pattern in some way, but do not use that exact meeting pattern.

To add your section, click in the empty space for the room and time.

Validation and Errors

Overview

Validation runs tests on a set of rules set by the institution to verify that offerings are using resources to maximum efficiency. Rules are set and modified by the institution's CLSS administrator.

CLSS Rule Error Messages

Some error messages in CLSS are set by Rules and are intended to require users to change offering information. CLSS has three rule error types: Error, Warning and Workflow.

Error

An Error indicates that the section or scheduling unit may not be saved as is. The error description will give the rationale and possible solutions to the error. The Save As-Is or Start Workflow buttons will not be available if there is any error present. To save the section, correct the error then attempt to save again.

Warning

A Warning indicates that the section or scheduling unit may be saved, but caution should be taken before completing the schedule. The warning description will give the rationale and may list possible issues that may arise from this section. The Save As-Is Button will appear if the validation only required a warning and not a workflow or error. Warnings do not require any further workflow or approval to be saved.

Workflow

Workflow indicates that the section or scheduling unit may be saved as is but approval will be required to complete entry of the schedule into the SIS. The workflow description will give the rationale. The Start Workflow button will appear when validating a scheduling unit as a whole in Design Mode. When saving a section in Design Mode the workflow indicator will show, but the Save As-Is button will display. In Design mode all workflow takes place at one time for the entire scheduling unit. In Refine Mode when the section is saved the Start Workflow button will appear and the section must be sent through workflow on its own. For more information about modes see Phases and Modes.

CLSS Software Error Messages

Errors that are related to a software issue will appear in a blue box near the top of the screen. If the error persists after refreshing the web browser, contact your on-campus CourseLeaf administrator.

Additional Resources

- CAT Release Notes
- CAT Theme Refresh and Reorg
- CIM Release Notes
- Frequently Asked Questions (p. 81)
- Glossary
- Help Messages
- Help Videos
- Known Issues
- LUC 2016 Newsletter
- Support
- 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/](/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 choose 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 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 the Insert/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. 24) in the help documentation

Can I include a Google powered search for my catalog?

Please see the 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.

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.

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. 20).

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. 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.

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). 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 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 button. 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 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.

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. 47) 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.

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. 19).

How do I make a user an administrator?

Administrative access is granted on the CourseLeaf Console in the Account Management screen. See Account Management for more detailed directions.

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

Please refer to Workflow Emails.

How do I add or remove users and create groups?

To add and delete users, refer to 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.

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.

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 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.)' on the 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.

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. 20) or Plan of Study Grids (p. 27).

CourseLeaf CIM Questions

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/](/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.

CIM is telling me a word with quotation marks around it or with an apostrophe is not syncing, but they look identical. How do I get it to sync?

Many times when CIM and the SIS appear to be the same, but CourseLeaf is reporting differences with words that have quotation marks or apostrophes, there may be a difference in the punctuation. For example, if you look closely at:

"Taxicab"

“Taxicab”

The first field has standard ASCII quotation marks. The second field has curly quotation marks, presumably pasted from Word or another external program and was not input using the " key on the keyboard. You would either update CIM to have the standard ASCII quotation marks (the " key on the keyboard), or copy/paste the curly quotation marks from CIM into the SIS.

The same thing applies to the apostrophe, if you look at:

Here's

Here's

There is a difference between the standard ASCII apostrophe (the first field) and the curly apostrophe (the second field).

There is also an option in CIM that tries to convert non-standard characters (such as curly quotation marks, em dashes, etc.) to ASCII equivalents when comparing. Contact your Support representative if you would like this option enabled.

What happens if a course is shredded?

Admins may shred course or program proposals with the Shred button, once a course or program has been edited. Shredding the proposal removes all edits from this proposal and sets the course or program back to the last approved state. It also removes the proposal from workflow. The course or program is now at rest and may be edited again. For new proposals, shredding the proposal removes it completely from the system, since there is no previously approved state.

What is "Preview Workflow"?

Preview Workflow allows you to see what the workflow approval path would look like if the proposal were to be submitted at that moment. The workflow may change depending on the values entered in the form. For example, if you designate a course as a general education course, a General Education Committee can be included in workflow. Every time you change a proposal, the Preview Workflow may change.

What's the difference between the different "Save" options?

When creating or editing a proposal in CIM, there are three options at the bottom of the proposal: Cancel, Save, and Save and Submit (or Start Workflow)

Cancel - Close the proposal and discard any changes since the last save

Save - Save the proposal. This does not require all fields to be filled in and will allow you to resume the proposal at a later time.

Save and Submit (or Start Workflow) - Save the proposal and submit it for approval. All required fields will be enforced at this time.

Administrators also have the option to do an "Admin Save", which allows an administrator to bypass the approval workflow for administrative changes, such as correcting grammar or typos.

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

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How do I edit a document that was attached to the CIM proposal?

Attachments within CourseLeaf are similar to attachments within an email. Download the attachment to your computer and use a document editor to make updates. You may reattach the document, leaving the original if you'd like the revision history. Or simply replace the original attachment with your updated version.

How do I add a course to my program if it is not in the course picker?

Courses appear in the course picker either when they are approved and in the Student Information System, or when they are proposed in CIM Courses, depending on the institutions' needs. Your institution may have a best practice for proposing programs with new courses. Contact your CourseLeaf administrator to find out the best practice for your institution.

How do I delete a CIM proposal that was started by mistake?

Admins may use the Shred button to shred a proposal and set the course or program back to the last approved state. If it was a new proposal, the proposal is deleted from the system.

How do I make different fields required (or not)?

Admins should contact support to permanently make different fields required (or not). Admins may also temporarily make all fields non-required by using the gear tool at the top of the CIM form and choosing All Fields Non-Required. This will only last until the form is closed and does not affect any other users.

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To insert a CIM program into the CAT page body editor, please see the Placing CIM Programs in CAT page (p. 47) of the Help Documentation.

How do I make a user an administrator?

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

Please refer to Workflow Emails.

How do I add or remove users and create groups?

To add and delete users, refer to 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.

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How do I update a form?

If you are looking to update the items that display in the drop down menus, next to the radio buttons, and next to the check boxes on your forms, you can do so through CIM Code Management.

If you are looking to update the fields on your form, contact your Support Specialist, who can assist in field updates.

What are FYI emails and how do I control them?

For the information on controlling what the emails say, refer to Workflow Emails.

For how to control who receives an FYI email in the Workflow process, see step 5 and it's sub-steps below.

How to Add Steps to a Workflow

1. Navigate to the Catalog Console
2. Click Course or Program Workflow Management, located under the CIM heading
3. Select the workflow to which you want to add steps
4. Click the green button
5. Enter the identification in the Step ID field
 - Special Criteria check boxes below the Step ID field make that workflow step behave differently when checked.
 - FYI Only - the primary contact for the step will be sent an fyi notification and cannot approve.
 - FYI All - all members for the step will be sent an fyi notification and cannot approve.
 - If Exists - the step will only be included in workflow if a role exists. For example, when Dept Chair becomes HIST Chair, it will look to see if HIST Chair is a valid role. This is useful when different departments have different roles for their department, such as Dept Chair and Dept Director.
 - Other - check boxes, such as Is Undergraduate or Is Graduate, indicate that workflow step will only be included in the workflow if that criteria is met.
6. Click OK
7. Click Done to save your changes

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. 20) or Plan of Study Grids (p. 27).

CourseLeaf CLSS Questions

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/](/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.

What is the syntax for entering a User-Defined Meeting Pattern?

An example of a User-Defined Meeting Pattern would be "MWF 8:30am-9:45am". It begins with Capital Letters denoting the day of the week. Some clients use "Th" for Thursday, some use "R". The day is followed by a space, then the start time. If it starts at the top of the hour, you may leave off the minutes. The start time is immediately followed (no space) by the am/pm designation. If you leave off that designation, the system will default to "am". Next is a dash with no spaces surrounding it, then the end time.

If your meeting pattern should have two different start and end times, you may concatenate them with a semi-colon, such as "MW 1pm-2pm;F 3pm-4pm".

How do I cross-list a course in CLSS?

To cross-list sections in CLSS, please see the Cross-Listed Sections page (p. 71) of the Help Documentation.

How do I make a user an administrator?

Administrative access is granted on the CourseLeaf Console in the Account Management screen. See Account Management for more detailed directions.

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

Please refer to Workflow Emails.

How do I add or remove users and create groups?

To add and delete users, refer to 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.

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.

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

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.)' on the 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.

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