Getting Started: How to Log On to the UA CourseLeaf Catalog

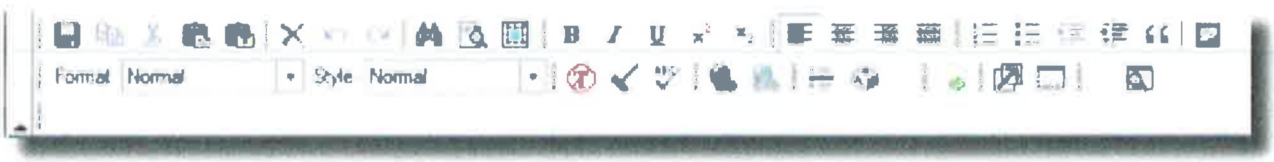
• In a new Web browser, go to **ua-next.courseleaf.com**, then click on the **EDIT PAGE** icon in the upper left-hand corner directly under the webpage navigation toolbar.

• The MyBama log-in screen will then open in a pop-up window, where you will need to enter your MyBama credentials. After entering your **MyBama user name and password**, select **Sign In** and the MyBama pop-up window will automatically close.

• The **editing toolbar** will open along the top of the webpage. You are now logged in to the UA CourseLeaf Catalog and can begin the editing and/or approval process.

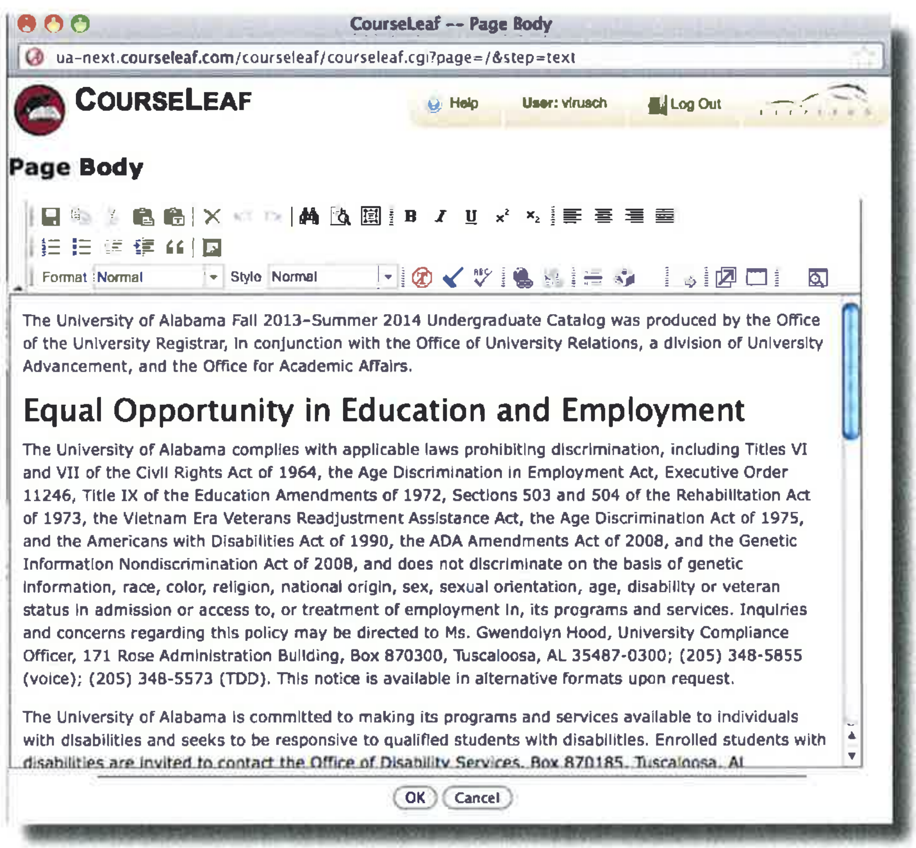
Working Within the Page Body

Page Body refers to the center of activity for a page — it is where most of the text, images and structured content can be added or edited. The **Page Body tools** work like standard word processor tools.

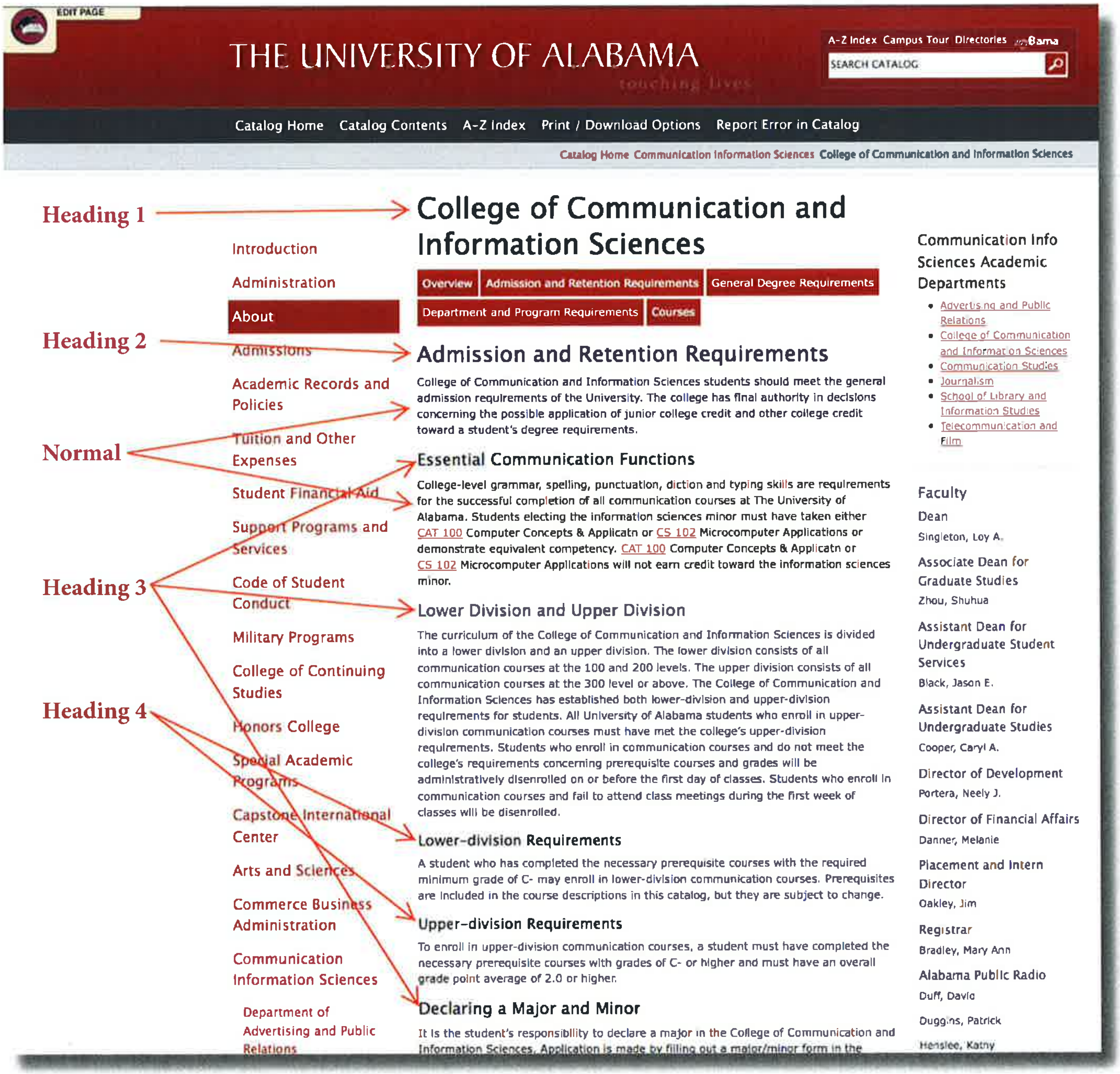


Click **Edit Page** on the top left corner of the screen to reveal the **CourseLeaf toolbar** and select the **Page Body tab**.

An editing environment will then open in a new window where you can edit the content on a specified page. *Note: Each tab presented in each section has a correlating editing section under the CourseLeaf toolbar with an editing pencil next to it; follow the same steps to edit each tab in your section of the catalog.



Page Body/Editorial Stylesheet



Heading 1: This is added to the page through the **Set Up tab** under the toolbar and will automatically be placed on every page under its section once added.

Heading 2: This should correlate with the name of the section/tab you are working in under the main heading. There should only be one Heading 2 style/subheader per page.

Normal: All general paragraph copy should be styled as "normal" at all times under all headers and subheaders.

Heading 3: Use Heading 3 to sub divide content into sections under the Heading 2 style. There can be multiple Heading 3 styles with in a page.

Heading 4: Use Heading 3 to sub divide content into sections under the Heading 3 style when needed.

***NOTE:** Use **BOLD** formatting style only for NORMAL style text that requires emphasis or special attention, never with Heading styles. Also, we typically do not use ITALIC or UNDERLINED format.

How to Create and Format Course Lists*

From the Page Body screen:

1. Place cursor in the page body where the table is to be placed or select table to edit.
2. Click the **Insert/Edit Formatted Table** icon.
3. Select the **Course List** to insert or edit an existing Course List table, and click **OK**.

Working with Course Lists

How to Add a Course

- 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 course list based on the College and Department you select. The right hand column is where you move the courses to build your list.

  Option 1

  Select course from **Course Inventory**, then click (>>) button to add that course to the list.

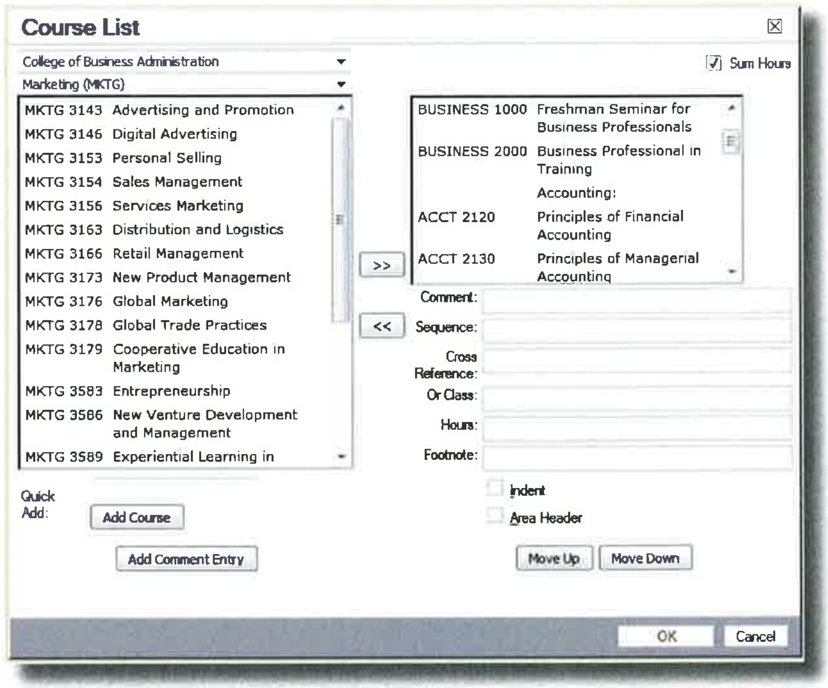
  Option 2

  Double-click course from **Course Inventory**.

  Option 3

  Enter course code into Quick Add, then click **Add Course**.

- After adding the first course, select in the right hand list where the new course is to be inserted (the course will be placed under the selected course).
- Click **OK** in the **Course List** editing screen to close the **Course List** screen and refresh the **Page Body**. Click **OK** when finished to save any changes that were made.



How to Remove a Course

- Highlight course in the right list to be removed.
- Click (<<) button to remove course from the list.
- Click **OK** in the **Course List** editing screen to close the **Course List** screen and refresh the **Page Body**. Click **OK** when finished to save any changes that were made.

How to Reorganize a Courselist

- Highlight course to move in right list.
- Click **Move Up** or **Move Up** to change the order of the course.
- Click **OK** in the **Course List** editing screen to close the **Course List** screen and refresh the **Page Body**. Click **OK** when finished to save any changes that were made.

How to Add Comment Entry

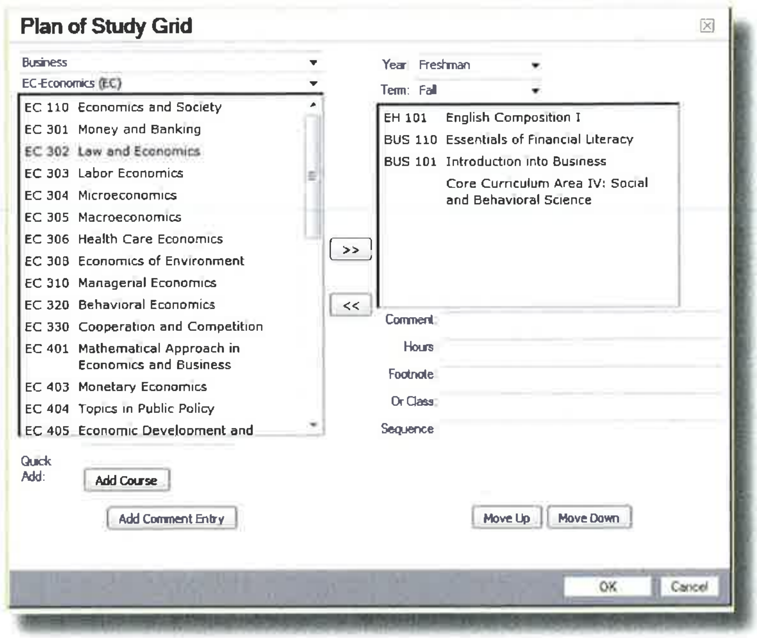
- Select in right list where **Comment Entry** is to be placed.
- Click **Add Comment Entry** (example: One Additional L/HU/FA).
- A text window will open; enter text to be placed in course list.
- Click **OK** in the **Course List** editing screen to close the **Course List** screen and refresh the **Page Body**. Click **OK** when finished to save any changes that were made.

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

How to Create and Format Plan of Study Grids*

From the Page Body screen:

1. Place cursor in the page body where the table is to be placed or select table to edit.
2. Click the **Insert/Edit Formatted Table** icon.
3. Select the **Plan of Study Grid** to insert or edit an existing Plan of Study Grid, and click **OK**.



Working with Plan of Study Grids

How to Add a Course

- Select **College and Department** from drop-down menus. ***Note:** The left hand column will populate the **Course Inventory** or a list of courses you can choose to add to your grid based on the College and Department you selected. The right hand column is where you move the courses to build your grid.
- Select **Year** and **Term** to insert course.
- Select in the right hand list where the new course is to be inserted (the course will be placed under the selected course).

  <u>Option 1</u>
  Select course from **Course Inventory**, then click (>>) button to add a course to the grid.
  <u>Option 2</u>
  Double-click course from **Course Inventory**.
  <u>Option 3</u>
  Enter course code into **Quick Add**, and click **Add Course**.
- Click **OK** in the Plan of Study Grid editing screen to close the Plan of Study Grid screen and refresh the Page Body. Click **OK** when finished to save any changes that were made.

How to Remove a Course

- Select **College and Department** from drop-down menus. ***Note:** The left hand column will populate the **Course Inventory** or a list of courses you can choose to add to your grid based on the College and Department you selected. The right hand column is where you move the courses to build your grid.
- Select **Year** and **Term** to insert course.
- Highlight course in right list to remove.
- Click (<<) button to remove a course from the grid.
- Click **OK** in the Plan of Study Grid editing screen to close the Plan of Study Grid screen and refresh the Page Body. Click **OK** when finished to save any changes that were made.

How to Reorganize a Plan Grid

- Select **College and Department** from drop-down menus. ***Note:** The left hand column will populate the **Course Inventory** or a list of courses you can choose to add to your grid based on the College and Department you selected. The right hand column is where you move the courses to build your grid.
- Select **Year** and **Term** to insert course.
- Highlight course to move in right list.
- Click **Move Up** or **Move Down** to change the order of the course.
- Click **OK** in the Plan of Study Grid editing screen to close the Plan of Study Grid screen and refresh the Page Body. Click **OK** when finished to save any changes that were made.

How to Add Comment Entry

- Select **College and Department** from drop-down menus. Note: The left hand column will populate the **Course Inventory** or a list of courses you can choose to add to your grid based on the College and Department you selected. The right hand column is where you move the courses to build your grid.
- Select **Year** and **Term** to insert course.
- Select course in right list where **Comment Entry** is to be placed.
- Click **Add Comment Entry**; a text window will open titled **Add Comment Entry** (example: One Additional L/HU/FA).
- Enter text in the **Enter Comment Text field** as it should appear in the Plan of Study Grid.
- Click **OK** in the Plan of Study Grid editing screen to close the Plan of Study Grid screen and refresh the Page Body. Click **OK** when finished to save any changes that were made.

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

Helpful Tools

Spell Check

It is a good idea to always run spell check after editing in the page body. The spell checker will look for words it does not recognize, starting at the top of the page and scanning down. When it finds one it will open the **Check Spelling window** and offer spelling suggestions. If the flagged word requires correction, select the appropriate word from the **Suggestions List** or type the correct spelling into the **Change To** field and click **Change**. To change all occurrences of the flagged word on the page, click **Change All**. If the flagged word does not require correction, click **Ignore**. Click **Ignore All** to skip over other occurrences.

Remove Formatting

When importing or pasting new copy into the page body be sure to click the **Remove Formatting** button to clear any formatting from the new text, then re-format the text to match catalog editorial stylesheet.

Clean HTML

When copying and pasting from Microsoft Word documents, be sure to clean the HTML code. Click the **Clean HTML** button/broom tool to clean out any HTML code.

Helpful Tips

• Do not copy/paste tables into catalogs or blue boxes. The formatting/sizing will not copy in correctly and these will have to be rebuilt.

• Do not copy and paste blue boxes that surround any specified content, such as course lists, plan of study grids, etc.). Copy and pasting content from the blue boxes will not maintain the correct formatting/linking and will have to be redone to work correctly.

• Always use the broom tool to remove HTML formatting if text is copy/pasted into the Page Body window from a Microsoft Word document. Never paste text into the page body from a webpage or other non-Microsoft document.

• Spaces between paragraphs and headers are already built into the style formats, so no need to add extra spaces between paragraphs, headers or sections.

• Before closing out the Page Body window, be sure to click **OK** at the bottom of the Page Body window to save your edits. Once you select OK, the Page Body window will automatically close out and your edits will now show in the original catalog window. Select **CANCEL** only if you do not want your edits to be saved. If you should close out the Page Body window without selecting OK, your edits will be lost.

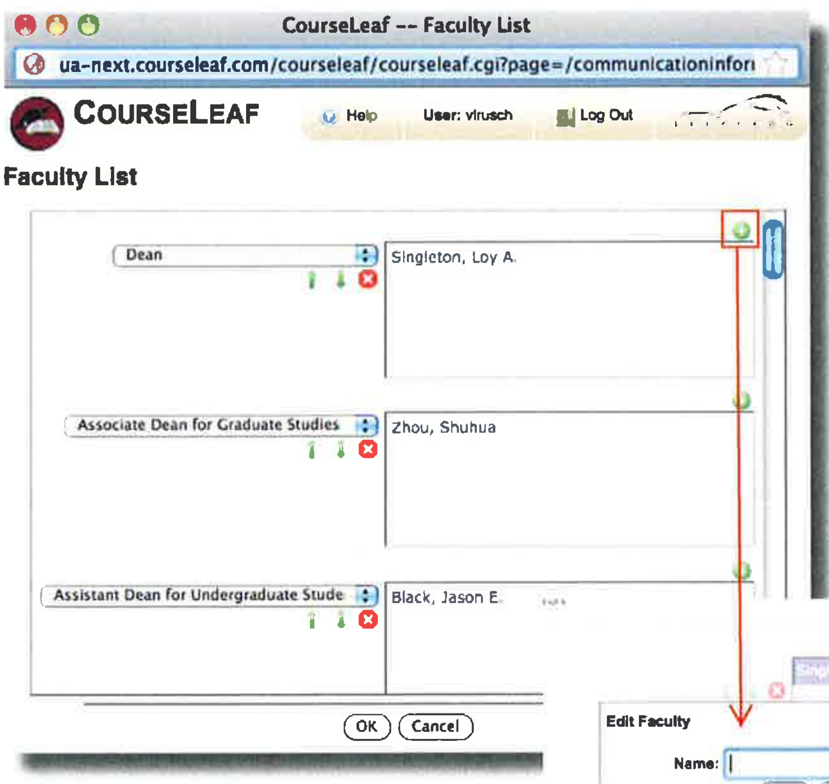
• Once you return to the original catalog window and have double checked all your changes, be sure to click the **START WORKFLOW** button at the bottom of the page when you're finished so that the page will continue to advance through the Workflow process.

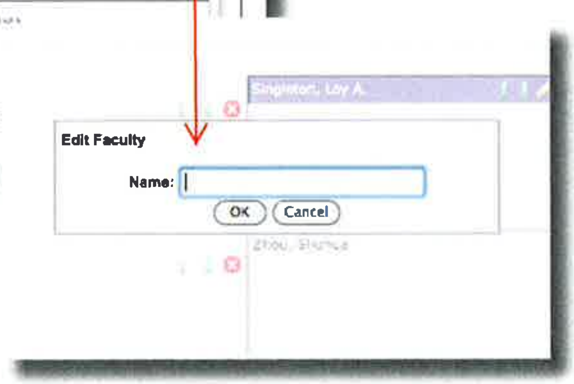
• To have a new page or tab added to your section of the catalog, email your request to **schedule@ua.edu**.

How to Add Faculty and Staff Listings

Click **Edit Page** on the top left corner of the screen to reveal the **CourseLeaf toolbar** and select the **Faculty List tab**.

An new editing environment will open in a new window where you can edit the content of your department's faculty/staff listing titled **Faculty List**.

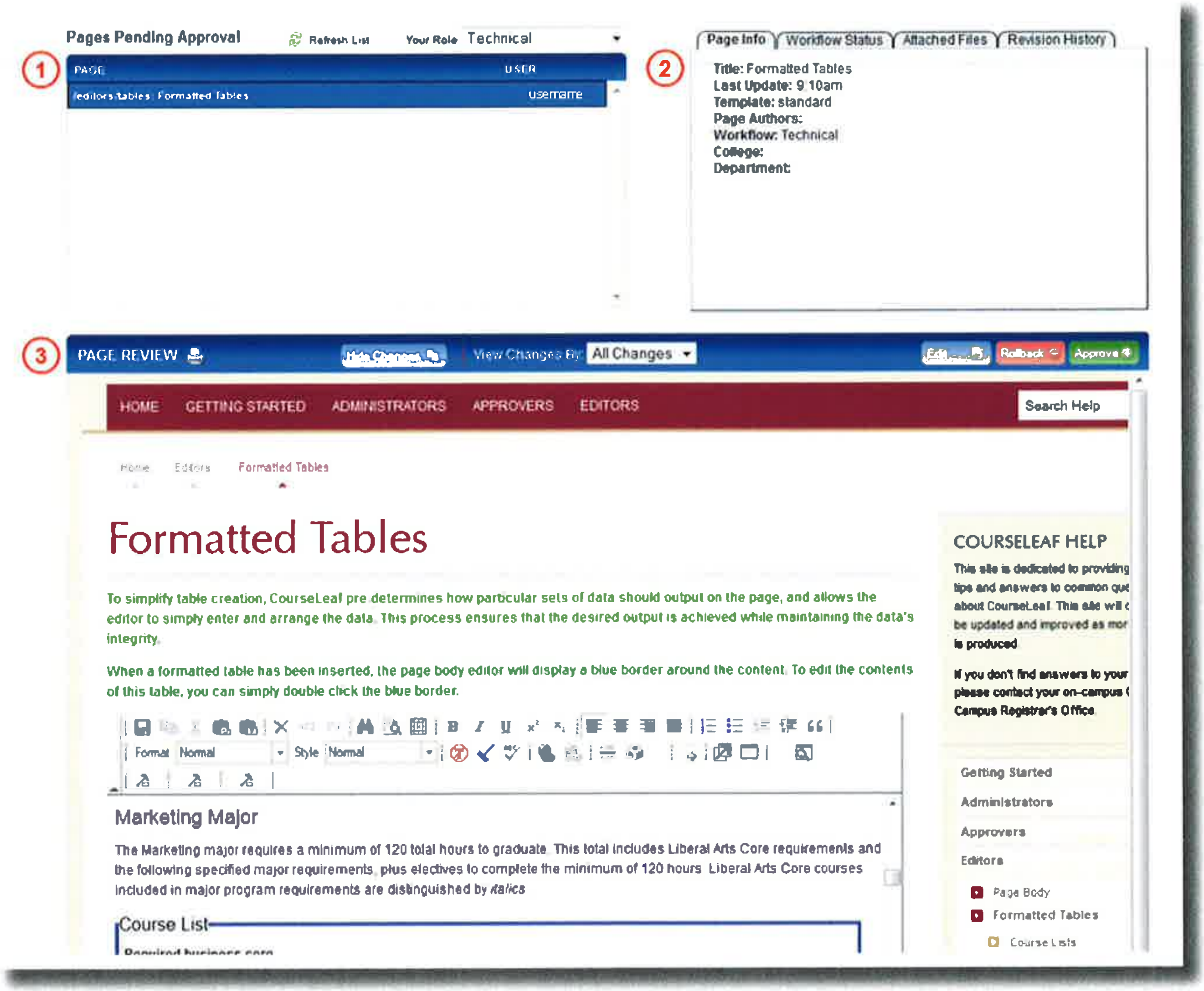




From the **drop-down menu on the left**, select the title to input and click the **green + button** above the right column to input the faculty/staff member's name, listing by **last name first, first name second and middle initial last (optional)**. Select **OK** to add the name to the right-hand column. Complete the same process for every position/name, then select **OK** at the bottom of the Faculty List screen.

Approvers

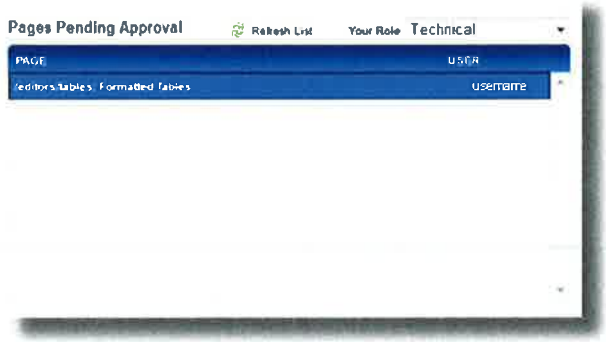
Page Approvers can access the catalog at **ua-next.courseleaf.com/approve**. The page approver setup is divided into three main sections:



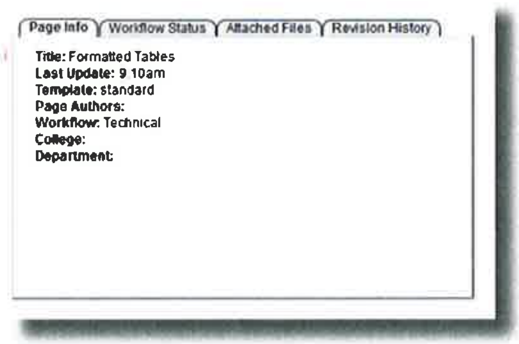
1. The pages pending approval list (upper left): Use this list to select the page you wish to review. The page you select will appear in the **Page Review** window. Click the drop down to **select your role**. This will automatically populate the page review window with that pages that require your review, editing or approval. Click **Refresh List** to see if new pages have been added since your last visit or if the list doesn't contain an expected page.

2. The page info/status window (upper right): Review basic page information and the workflow status of the selected page here. Click the various tabs to view different reports. Click the **workflow status** tab to review and update workflow progress.

3. The page review window (bottom): Review the selected page here, then approve it, edit it or send it back to the 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 you wish to review.



Click the **Your Role drop down** at the top of the page and select your role, if not selected by default. This will populate the **Pages Pending Approval list** with pages assigned to that role. ***Note:** Click **Refresh List** to see if new pages have been added since your last visit or if the list doesn't contain an expected page.



Scroll through the **Pages Pending Approval list** and select the page you wish to edit. When you select a page the **reports and workflow status window** and the **Page Review window** will be populated with information.

Reviewing Content in the Page Review Area

• **View changes made by prior editors:** Click the **View Changes** drop down menu and select an editor whose changes you wish to review. ***Note:** The selected editor's changes are shown in red and green. Red for deleted text, green for new text.

• **Hide Changes:** To view the document as it is without color coding or markup, click **Hide Changes**.

• **Edit the page:** Click **Edit** to make your own changes to the page. This will produce a toolbar at the top of the **Page Review window**. Visit the **Page Body tab** within the toolbar or select **Edit Page Body** within the page to make the desired edits. Once you edit the page, you may then approve the page to send it to the next step in the workflow.

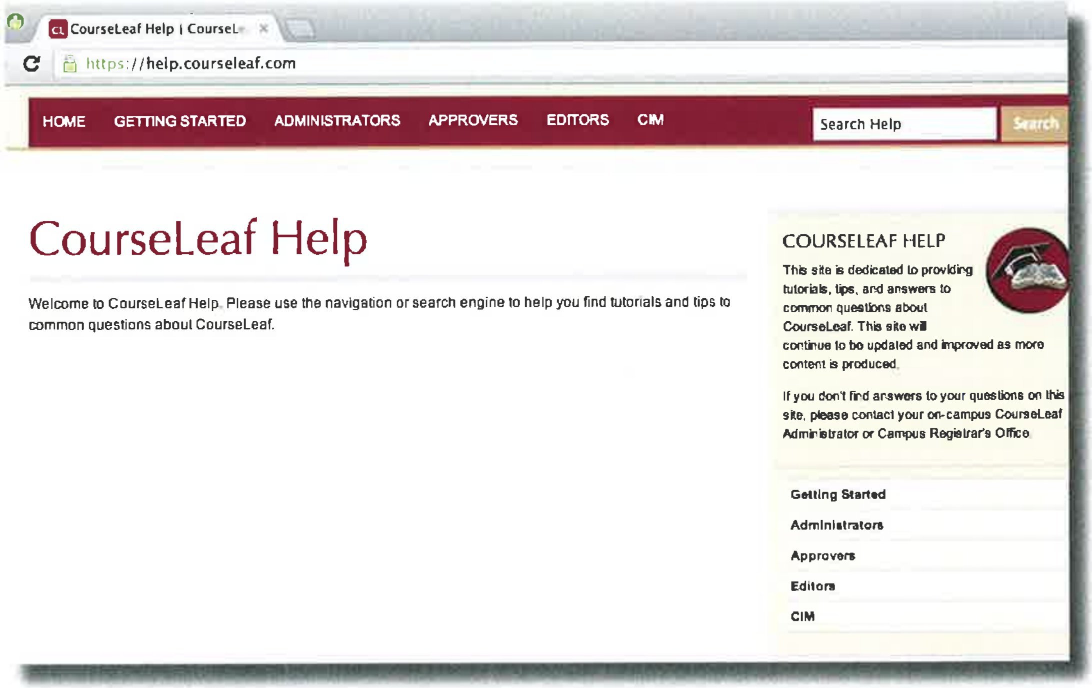
• **Roll back the page:** Click **Roll Back** to send the page back to the previous editor. When you do so, you are prompted to make comments about why you are sending the page back for re-edits. Make your comments in the space provided and click **Roll Back** in the new window.

• **Approve the page:** Click **Approve** to send the page on to the next step in the workflow.

• **Leave the page for another time:** You may also leave the page action for another time and select another page to review, or click **Logout**.

Additional Resources

For additional help in using the CourseLeaf Catalog software, including further step-by-step instructions, either select the **Help tab** under the **CourseLeaf editing toolbar** once you're logged in or visit **help.courseleaf.com**.



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