CAT Training Guide

Overview

This page provides the outline that Leepfrog's trainers use for their onsite trainings. We like to schedule end user trainings for one hour and thirty minutes. The first hour is used for a demonstration of the tools and answering questions. The last half hour is used for user-practice. We've found that this training structure helps accommodate two different types of computer learners: “Do-It-Yourself-ers” and “Recipe Followers”.

The content has been divided into four main areas:

1. Welcome and overview
2. Tour of your catalog
3. Toolbars
4. Workflow and Approve Pages

Welcome and Introduction

- Our main goal is to help you feel comfortable and confident with the catalog editing process.
- We'll use the first hour of our session to go over the catalog and the various tools you'll have available. And the second part of this training will be user practice.

What is CourseLeaf

- CourseLeaf is a powerful tool that integrates SIS data and workflow to help maintain an accurate course catalog.
- CAT combined with CourseLeaf Curriculum automates how courses are proposed, approved, and entered into SIS and catalog.

Catalog Instances

Your CourseLeaf catalog comes with three instances:

- **Next Catalog Site**
  - The next environment is where all edits are made for the future edition of your catalog.
- **Current Catalog Site**
  - Curr is an intermediary environment that allows an administrator to make updates to the live site after Next has been rolled to a more future edition.
- **Live Catalog Site**
  - The live site is your public catalog site.

The next and current instances remain in place so that edits can be made for the next catalog when the time comes.

Touring CAT

Navigation

- There are three ways to navigate through catalog site:

1. the nav bar
2. breadcrumb trail
3. search box

- Nav bar will expand depending on the page to show relationship to other areas in catalog and can be used to jump within the catalog.

Breadcrumb Trail

- Think Hansel and Gretel.
- The bread crumbs are another way to show relationship to rest of catalog by showing the path taken to get there.

Search

There are two kinds of search in your CourseLeaf catalog.

Focus Search

FocusSearch is the default search engine for CourseLeaf. It is the only search engine available for the Next site, and it allows CourseLeaf search to direct users to preferred pages by using keywords. Pages that are set up with keywords appear at the top of the search results, allowing CourseLeaf to more directly influence search results than with a Google search alone.

Google Search

Google search can be enabled for your Live catalog. Google results will always show up after Focus Search results, and will only search within your catalog.

Mobile Friendly

- Your CourseLeaf catalog provides one site that works for computer and mobile platforms
- Words and graphics wrap correctly, and display on smaller screens without having to use an additional site

Print

- Many universities are moving away from printing a catalog, which can save them thousands of dollars.
- We still give the ability to have professional, high-quality print capable through PDFs that can be downloaded by students and printed.

Course Bubbles

- Students read a catalog to find out about courses.
- Course bubbles pull data from SIS.

Bottom Toolbar

Logging in and out

- In the next environment, look for the CourseLeaf logo and Edit Page. Click will prompt for username and password.
- Explain the Single Sign On process. Users can log-in with their institution user ID and password.

Owners, editors and workflow

- Bottom bar shows who owns the page, how it will travel from person to person until it is published, and its current status.
- When the green workflow button is clicked, the page is out of your outbox and on to the next person.
- If anyone clicks Start Workflow, it cannot be edited by anyone else until action is taken by the individual/ role listed as the first step in workflow.
- In the workflow things can be rolled back to the previous person, approved, or edited.
  - Rolling back a page doesn’t mean you’re removing the edits, you’re just sending it back to the person before with some notes for things to try again.

Top Toolbar

Admin vs. General End-User

- Admins in our parlance are people that can control more of the structure and flow of the site. Not necessarily school administrators.
- General End-Users don’t have access to all features to allow for a more streamlined process.

Setting owners/editors

- Admin only tool.
- Workflows are controlled with the Owners/Workflow Tab.
- Owners are the person/people responsible for making the initial edits to a page.
- Each page can have its own workflow, or a standard workflow can be set up for all pages. Page workflows trump standard workflows.

Manage Tabs

- Usually an Admin only tool.
- Tabs are good for distinct material or to make very long pages more manageable.
- Type a section name then press the tab key on the keyboard which will make an ID.
- Leave other fields alone and press okay.
- The tab does not show up until there is content on it. Use the Edit Pencil that corresponds to your new tab to add content.
- Once information has been added, the tab will display.

Set Up

- Sets title and search features.
- Title is the title of the page, but this may not affect the navigation.
- College and Department links this page to particular courses in SIS.
- Web site is an external site. Make sure to use full path.
- Page description will not appear on page but will be used in search. Without page description, some text from the page will appear in search results.
- page descriptions set by initial text on page. This changes that.
- Keywords help people find your page when those words don't perhaps show up on your page.
    - Unique about the page

Page Body Editor

- Very similar to Word.
- Save icon and OK both save, icon keeps editor open, OK closes the editor. Must click OK to save.
- Bulleted lists and numbered lists – when copying lists bulleted or numbered, best practice is to use these tools and delete numbers or bullets. Allows for PDF to produce correctly, show up on various platforms correctly.
- Format – headings to break up content. Should not use h1 since that is the title heading.
- Link Tool
    - Need relative paths for catalog links
    - Full paths for external links
- Inline Course/ Insert Database Field
    - Allows you to find courses by college and dept
    - Links to SIS database
    - Can either type it first and then click button
    - Can choose formatting to include title, number, etc. from drop down at bottom
    - Auto-update whenever things change
    - To delete, place cursor after and press backspace
- Insert Formatted Table
    - Pre-defined table: built row by row, the fields are the columns
    - Course list: again, chose by college/dept., then double click course, use >> or do quick add with course code
        - With quick add, if the course number is not found, it will say Course Not Found. Either course is no longer offered, it is not in the data, or the course code was in error
        - Click on a course on the right, then fill in any fields below
            - Sequence = & symbol, take concurrently
            - Cross Reference/Listed= / symbol, same teacher, same course, same time, different credit
            - Or Course = take one course or the other (comma separated, no space)
            - Sum Hours = totals up all of the hours
            - Add comment entry allows you to enter a row with some information
                - :: gives a space in the first column to avoid having anything in course (ie "GRD XXX::Grad Course Unknown" will create an entry in the table like GRD XXX Grad Course Unknown)
            - Hours – does not affect SIS, red box will indicate difference from SIS
            - Indent courses to keep them from summing total hours
            - Footnote: just insert the indicator footnote indicator for what the footnote will be. You build the text of the footnote with a formatted table
    - Plan of Study Grid – very similar to courselist except you pick a year and term

Accuracy Report

- Provides a red box report by page. This is great for pages that have tabs with tables. Its a quick view of any red boxes on all of the tabs.

Show Differences

- Provides a pop up window with the red/green mark up on a page. Additions to the page are in green. Things removed from a page will show in red with a strike through.

View as PDF

- Creates a quick PDF, not the final one, and can take some time to generate.

Help documentation

- Goes through with step-by-step instructions.
- Not customized for each institution.

Approve Pages and Workflow

- Pages pending approval page – get here from email link.
    - Buttons at top of page
        - View/Hide Changes
            - Can see edits (red and green marks) by who made them.
            - Hide the red-green markup if desired.
        - Edit
            - The edit toolbar appears, and all tools from above can be used.
        - Roll back
            - You can roll back to anyone in the step, will maintain all of the edits. Give a comment why it is being rolled back. Comment is not private communication and can be seen by admins.
            - If you roll back, it must work through workflow from that point again.
            - In the workflow things can be rolled back to the previous person, approved, or edited.
                - Rolling back a page doesn't mean you're removing the edits, you're just sending it back to the person before with some notes for things to try again.
        - Approve