**GSE 2019-2021 Catalog Navigator Training**

**Set up computer to look at catalogs.rutgers.edu, ucm.rutgers.edu, CN**

**I. OVERVIEW**

1. **Online Catalogs (catalogs.rutgers.edu; archive; search; front page)**
2. **Catalog Navigator (CMS; database; related to Degree Navigator)**
3. **Process (rounds, edits, approvals, proofreading, final changes, generation, 6 months-year)**
4. **Browser (Firefox is best)**
5. **Rutgers NetIDs and passwords (to access CAS, I only need NetID)**
6. **Who’s Responsible for Which Sections (boilerplates vs. remainder)**
7. **CN Hierarchy (chapters, subchapters, pages)**
8. **Time Outs (15 minutes; SAVE often)**

**II. SIGNING IN**

1. **Homepage (has list of items waiting for your approval listed *if* you are an approver)**
2. **Open Catalog (File>Open>Catalog Groups>Rutgers 2019>GSE 2019-2021 catalog); File>Logout**

**III. EXPLAINING WHAT YOU SEE ON CATALOG PAGES**

1. **Context panel (grey box at top): Used to add and link new material; contact me to do so, so we keep like items in same hierarchy.**
2. **Left-hand navigation (functions like table of contents): As you drill down and click on items, you can see the hierarchy of related items.**
3. **Breadcrumbs (below the CATALOGS maroon banner): Lets you keep track of where you are in the catalog – can click to get back.**
4. **Grey Bar on page item: Gives you workflow status and date. Other icons: move items up and down on a page; insert content before; log; pencil icon to edit. Pencil icon disappears after you have moved an item up in the workflow.**
5. **Edit mode (click on pencil): See spellcheck; find/replace; design/HTML; comments box. Has functions similar to WORD and formatting. Just leave formatting and cleanup to us. Especially when you copy and paste from WORD doc or web – much formatting makes the content look crazy in CN. I can fix. If you need assurance, call me or, if you still have a pencil icon, look at the editor (WYSIWYG). Cancel or red button=nothing saved. Save and Submit buttons =workflow items.**

**IV. WORKFLOW**

1. **For this catalog: GSE editor and GSE approver.**
2. **When the editor of each group is done with their work, they must save and submit the content, then approve themselves (click on red check mark on the left side of the grey bar on the top of the page that reads "Waiting for GSE editor approval.”) Then the wording will change to “Waiting for GSE approver approval.” The catalog will then be ready for approval by Matt and you will no longer have pencil icon to add new info.**
3. **If an item’s grey bar reads “Edited by.....”, then it is NOT in the workflow or on an approver’s homepage.**

**V. EDITING CONTENT**

1. **You can add content, delete content (use backspace/delete), copy and paste from files or webpages, and adjust formatting and fonts. You only need to add or delete content that makes your program info accurate. I will take care of how it looks--no need to fear redlining and green font that seems random.**
2. **If you want to delete the entire page:** **To save you time, you may simply enter the edit mode and write “please delete this page” at the beginning of the copy and I will delete the entire page for you. You cannot delete large-scale content (such as a course listing or page of requirements) and will have to get in touch with me about anything you want to delete.**
3. **Also let me know if you want to reorganize a section or add new chapters or subchapters. Call me and we will discuss the need and figure out the best layout. Then I will create the new templates for you to fill in.**

**VI. COURSES**

1. **Most critical that these be accurate: course numbers, pre- and corequisites, and that those details are identical to the courses listed on the program requirements descriptive pages.**
2. **To add new courses to existing course page:**
3. **Use insert content button in Context Panel next to Courses page (left arrow). Insert Content Wizard asks what you want to create: choose new content, course, next, and then fill out the appropriate fields and Save. Places “NEW” course at bottom of list; need to use arrow buttons to move to proper numerical place.**
4. **From existing course – See left arrow in grey bar Insert Content Before. Choose new content, course, next, and then fill out the appropriate fields and Save. Places new course in correct numerical order.**
5. **Note: you have to write the word prerequisite or corequisite in the box next to them. Principal is instructor (not always used). The system will automatically adjust the proper fonts for all fields.**

**VII. MISCELLANEOUS**

1. **We use Rutgers Editorial Style Guide, so I will edit your content accordingly (semester v. term; coursework; chair; closing most hyphens; website, webpage, etc.). At UCM website front page.**
2. **User Manual: The manual goes into detail about editing existing content and will give instructions on how to add new content.  You don’t have to go it alone; call or email me.**
3. **Linking/Hyperlinking: If you provide the URL, I will make sure it is hyperlinked so that the webpage opens in the same window. References to other sections in the same catalog are similar. Whenever possible, we try to guide students back to school’s website for the most up-to-date info.**
4. **Sometimes first-time editors will get a “Site not trusted” message when they try to login. Please follow the directions to make an exception and trust the site. Thereafter, you should not get that message.**

**3/1/19**