Training Session 3 - Acalog™

COURSES, CATALOGS, ORGANIZATIONS, EXPORT, IMPORT, AND GATEWAY OPTIONS

This tutorial was designed to be used with the training Publisher and Gateway that were used during your Acalog ACMS training. Please login to either of these training sites using the Username and Password information that was specifically provided for you.

*Note: These training materials are proprietary in nature and should not be distributed or published in print or online.
Courses Module

When you first navigate to the Courses Module, you will be taken to the “Manage Courses” page. This is where you can view, edit, or create individual courses. To determine the fields available within your courses, navigate to the “Courses Template” tab, which was covered in Training Session 1.

MANAGE COURSES

Courses are the foundation of the Catalog. There are more courses within your academic Catalog than anything else. Courses can be part of an infinite number of Programs. A course is created once and the assigned to as many Cores, Sub-Cores, or Shared Cores as required.

System Level Vs. Organization Level

As with other items in the Catalog, anything that is created at the System Level cannot be edited at the Organization Level; however new items can be created to be used only within the chosen Organization.

Both Levels will have a full Course Filter that can be used to locate courses in the Catalog. If you click “Filter” with no search criteria entered, all courses in the Catalog will be listed. This is a “sticky filter,” which means it will remember your last search – even which page of results you were viewing. You can navigate away from the page and return to the same page you left off on. The filter will be reset if you clear your browser cookies or if you click “Reset” in the filter itself.

Course Search Results at the System Level

To the left of each course will be a symbol indicating that the course is owned at the System Level. The Course Name is a clickable link used to access the Course Summary page, from which the Edit tab can be selected. The “Preview” link will open a Publisher Preview of the full course details in a pop-up window. The “Course Type” column will indicate the Course Type that has been assigned to a given course; if this is blank, it means that no Type has been assigned to the course. “Status” will refer to the current active status assigned to the course here at the System Level. The final column is used to indicate if a FlashPoint Link has been assigned to the course. FlashPoint Links will be covered later in this document.

The “Organization Usage” column will include a link that opens a pop-up window listing each Organization, the name of the Catalog alias within that Organization, and the active status of the selected course within that Organization.

The Organization Usage column will be available within the System Level and the Organization Level for quick reference.
Course Search Results at the Organization Level

To the left of each course will be a symbol indicating whether the course is owned at the System Level or Organization Level. The Course Name is a clickable link used to access the Course Summary page, from which the Edit tab can be selected. The “Preview” link will open a Publisher Preview of the full course details in a pop-up window. The “Course Type” column will indicate the Course Type that has been assigned to a given course; if this is blank, it means that no Type has been assigned to the course.

Two status columns are available for reference: SL Status and OL Status. The SL Status indicates whether the course is active at the System Level; courses that are inactive at the System Level, will also be inactive at the Organization Level. The OL Status indicates whether the course is active within the selected Organization. Courses that are active at the System Level can be made inactive at the Organization Level if they should not be present in the Organization Catalog. The final column is used to indicate if a FlashPoint Link has been assigned to the course. FlashPoint Links will be covered later in this document.

The “Organization Usage” column will include a link that opens a pop-up window listing each Organization, the name of the Catalog alias within that Organization, and the active status of the selected course within that Organization.

The Organization Usage column will be available within the System Level and the Organization Level for quick reference.

Catalogs

AT THE SYSTEM LEVEL

Catalogs that are created at the System Level can then be shared across any/all Organizations. In this module you will find a list of all Catalogs that exist at the System Level. The name of each Catalog is a clickable link that can be used to edit the Catalog. In brackets to the right of the Catalog name you will see the Catalog’s status, either Published, Locked, and/or Archived. Published Catalogs will be listed at the top and can be re-ordered. Catalogs that have not been published will appear in alphabetical order below the published Catalogs.

Also in this list you will find a column for Catalog Aliases, Type, and Preview links. Types are important because only a single, current Catalog of a type can be published at a given time. However, you can have any number of Archived Catalogs published simultaneously.
Preview

The Preview link will open a pop-up window with a Publisher Preview pointing to the Catalog Home page. The Publisher Preview shows you how your content will appear on the Gateway, however there is not a Gateway for the System Level, so you can determine what styles you would like to use in your Preview. You can choose to “Use Default Styles” or choose the styles used by any of the Organizations in your preview, by adjusting the drop-down menu.

Aliases

Clicking the “Aliases” link for a Catalog will open a tooltip to show you the Organizations using an Alias of the System Level Catalog along with the name of the Catalog Alias.

Catalog Aliases are created in the Organizations Module.

Creating & Editing Catalogs

When you create or edit a Catalog, you can set the name of the Catalog, choose a type, and even enter comments for the Catalog. The comments are used as reference in the Publisher but will not be seen on the Gateway.

When you create a new Catalog, you can create a blank Catalog from scratch or copy an existing Catalog.

When you copy a Catalog, you can choose to also copy over any user permissions and/or attachments associated with the Catalog you’re copying.

When you edit a Catalog you can choose to Publish, Lock or Archive it. Publishing a Catalog at the System Level means it will be eligible to be Published to a Gateway at the Organization Level. Locking the Catalog means it can only be edited by a Manager-level user. Archiving a Catalog marks it as an older version of the Catalog. You may also choose to delete the Catalog, but only if the Catalog doesn’t have an Alias.

AT THE ORGANIZATION LEVEL

Catalogs can be created at the Organization Level, but most Catalogs will be created as Aliases of System Level Catalogs using the Organizations Module. When creating a new Catalog, you can create a blank Catalog or copy an existing Catalog, however, you cannot copy a System Level Catalog at the Organization Level.

When you edit a Catalog, you can adjust the name, which is a system required field. The type is assigned at the System Level, but you can also check “Override system level type” and choose a different type to be used at the Organization Level.

Comments are for reference in the Publisher, but will never be seen on the Gateway.
A series of checkboxes are used to determine whether the Catalog is Published, Locked, and/or Archived. A Catalog cannot be published to the Gateway unless it has been marked as Published at the System Level.

A Catalog cannot be deleted at the Organization Level if it was created at the System Level; however, you can unassign the aliased Catalog at the System Level.

**Organizations**

This Module is used to manage the Organizations associated with each of your Gateways. When you create or edit an Organization, you can determine the name of the Organization and enter Comments to go along with the Organization. You can also determine whether the Organization is Active or not. If the Organization is made inactive, it will be disabled in the Publisher, but Gateway access will not be impacted. You can choose to delete an Organization, but this will also delete all Catalogs within the Organization.

**CATALOGS ASSIGNMENT**

Under the “Catalogs Assignment” tab, you can create Aliases of Catalogs that were created at the System Level, so that they may be used at the Organization Level. In this tab you will see a list of the Catalogs that have already been assigned. You will also be able to create new Catalog Aliases.

First, choose a Catalog in the “Choose a Catalog to Assign” drop-down menu. By default, when you choose a Catalog from the drop-down menu, the name of the Catalog will be copied into the “Catalog Alias” field. You can then adjust the name of the alias to vary for the Organization.

In the list of Assigned Catalogs, you can choose to Remove the Catalog Alias. When the Catalog is unassigned, it will be removed from the Organization, but the Catalog at the System Level will not be affected.
Export Module

There are two different tabs available within the Export Module. The “Catalog Export” tab will allow you to generate a clean export of all data in your Catalog. Please note that this is not a fully paginated, print-ready document. The “Programs & Courses Export” tab will allow you to generate a CSV, XLS, or XLSX file containing course or program information.

CATALOG EXPORT

Before you can export your Catalog, there are two items that you will need to create: a print styleset and an export map. The steps for exporting a Catalog are the same at System and Organization Level.

Create a Print Styleset

A print styleset is used to determine the formatting of your exported document. You will predetermine how the content will export, choosing the fonts, sizes, and whether they are bold, underlined, or italicized. Once selected, the entire document will export following this formatting layout – however it will NOT impact contents within your publisher or on your Gateway. You may choose to create as many Stylesets as you would like, and you may modify them in MS Word once you have the export.

Creating a Print Styleset

Navigate to the “Print Styles” tab and click “Add a new print Styleset”. First, give your styleset a name. In the table below, types of text will be listed, and you can modify how they should appear in the exported document. You will have a drop-down menu with a limited selection of font types as well as sizes. Checkboxes are used to indicate whether the text should be in italics, bold, or underlined. Once you’ve made your selections, scroll to the bottom of the page and save.

Create an Export Map

An export map must be created to tell the publisher what information to include in your exported document. You may choose as much, or as little information as you like. You will be able to export custom pages and filters.

To being, navigate to the “Export Maps” tab and click “Add a new export map.” You will need to enter a name for your map and click “Save” before you will be able to proceed further.

Under the “Export Ordering” header, you will see a list of all custom pages and filters in the Catalog. Those that are currently marked as Active in the Publisher will appear green by default while Inactive items will appear red by default. Green items will be included in the exported document but red items will not.

Rev. [07/2016]
You can choose to include or exclude a listed item by clicking on the item name. This action is a simply toggle that will turn green items red or turn red items green.

Additionally, items can be reordered using the same drag-and-drop functionality used to move items elsewhere in the Publisher.

After making all changes, click “Save Ordering.”

**Queue the Export**

The next step will be to start the export itself, by navigating to the Queue tab. When running an export, note there are a few requirements for Word documents.

- Word 2007 is recommended (Our presentation used Word 2013)
- Word 2000 minimum
- Turn off spell/grammar checking
- Multiple Document is recommended
  - Microsoft Word can struggle with lengthy documents. As a best practice, we strongly suggest using the multiple document option.

The export will consist of the items you’ve selected in your export map, and the formatting you’ve chosen in your print styleset. The next step is to choose your options within the export. Although you are welcome to choose your own settings, our presentation follows our best practices and are outlined below.

- Select MS Word (Multiple Document)
- Under Export Styleset, choose the styleset you have just created.
- Under Export Map, choose the map you have just created.
- Choose options for your Export. Our selections included Expand courses in filter links, and remove all styles not defined by the print styleset.
  - Hide item types: Hides the item types from your filtered pages.
  - Expand courses in filter links: This option will show all course details when displayed within a filter.
  - Expand courses in programs: This option will show all course details when displayed within a program core.
  - Remove all styles not defined by the print styleset.
  - Note that it is NOT recommended that you choose expand courses in filter links AND expand course in programs within the same export. This will cause an extremely long file, and may contain duplicated information.
• Add to Export Queue. Due to the resources required and the processing time needed to export the data you have requested, Acalog will notify you via e-mail once the export is available for download. This may take up to an hour to process, in some cases longer - depending upon the amount of content being exported.

Download & Format the Export
Once the export is complete, you can download it from the Export module, or you can use the link that is emailed to you.

Each file will contain a different custom page or filtered item (provided you have followed the best practices and selected the multiple document option), and it will be numbered in the order it was listed within the Export Map.

When opening, you will need to be sure to complete a “Save As” and save each document as a Word document before you begin working. The initial export will have the file listed as a “web page” as it was obtained from the web.

Note: more information on how to review and format the exported document can be found on Acalog University.

PROGRAM & COURSES EXPORT
Program exports can be provided for informational purposes only, however Course exports can be used in conjunction with the Courses Import Module to make mass changes to courses.

Note: Program & Courses Exports will follow the same process whether performed at the System or Organization Level. At the Organization Level, you can choose to exclude System Level courses if you only need to modify the courses specific to the Organization. If only System Level courses exist in the Catalog, you will see an alert and the “Exclude System Level Courses” option will be grayed out.

Export Courses
Underneath Export Courses, you will need to choose a data format (CSV or XLS or XLSX).

Be sure that you only click the “Export” button once and you will need to remain on this page while the export process finishes.

When it is complete, it will provide you with a link to download the export information.

This link does not stay on this page, so if you navigate away and come back, you will need to perform another courses export.
Modify Course Data

With the exported file, you may want to remove any information that does not identify the courses you are editing (i.e. everything column except the Entity Name, Course OID, Prefix, Code, Name and any column or course that you are making your modifications to).

The Entity Name will contain the lowest level of ownership Hierarchy related to each course. It is very important to remember that your Entity Name has to match exactly what is in Acalog. For example, if the Publisher reads “The Department of Arts and Sciences” and your modifications include, “Arts & Sciences,” then the two items will NOT be able to match, and it will be imported and sent to the default.

If you are updating courses that already exist in Acalog, **use the Course OID as your key when importing.** The Course OID is the unique identifier that is assigned to every course in the database. If you are inserting new courses into the database, or importing courses from another external system, they will not have a Course OID, and you may use the Prefix and Code as the key.

If you see any columns in your export that contain three headings, such as Description, Description (Rendered) and Description (Rendered no HTML), then this is a Rich Text Field. All Rich Text fields are going to export into three columns. The first one, bearing the name of the field only (Description), will contain information specific to Acalog – such as PermaLink information. If you are updating this field to import back into Acalog, it is strongly suggested you utilize this first column. The other two options provide either plain text, or text formatted in HTML to allow you use his information in other ways if needed.

Courses Import Module

You can use the Courses Import Module in conjunction with the Courses Export Module to make the following types of mass courses database additions and / or changes:

- Insert new courses
- Update existing course fields
- Insert new and update existing course fields
- Change the status of existing courses

**IMPORT OVERVIEW**

To Import course data into your Catalog, navigate to the Courses Import Module. The first thing you will see is the overview of the process. Further down on the page you will find a description of the steps involved with a Courses Import.

Select the “Courses Import” tab at the top of the screen to continue to the import page so you may begin your import.

Rev. [07/2016]

Proprietary & Confidential

DIGARC.COM • 5015 SOUTH FLORIDA AVE • THIRD FLOOR • LAKELAND, FL 33813 • 863.709.9012
SET RESTORE POINT & IMPORT LOCK
The first step is to set the restore point and import lock. You’ll do that by clicking the “Set Restore Point and Import Lock” button. This process of creating a restore point may take a few moments to process.

Once the import lock is in place, “[IL]” will appear next to the Catalog name in the Catalog drop-down menu. This is to indicate to all users that the Catalog is currently locked for importing. No work can be done while the Catalog is locked. You will want to warn other users before beginning an Import as they will not be able to edit the Catalog at that time. This only impacts the Catalog you’re performing the import on. Other Catalogs can still be edited.

UPLOAD & VALIDATE DATA FILE
Upload a Data File
Next, you will upload the data file. Click “Browse.” Notice you will have to declare the file type, whether it’s an Excel or CSV file. Then click “Upload.”

You will have a pending bar at the bottom of the page. Keep in mind that the smaller your file is, the faster it will process.

Choose a Data File
Files that have been previously uploaded will remain available on this screen even after the import has been performed. You can later download the file if you want to review changes that were made. You do have the option of deleting files you no longer need; all files will remain unless you choose to delete them.

MAP DEFAULTS & COLUMNS
Declare the Type of Import
The Courses Import Module can be used to make any of the following bulk changes to your Course Database:

- **Insert** – to be used when only adding new courses.
- **Update** – to be used when only modifying existing courses.
- **Insert/Update** – to be used when adding new courses, and modifying existing courses in the same import.
- **Status Change** – to be used if the only change being made is to the active status of courses.
Map Defaults

Parent Hierarchy Item

After choosing the type of import, some additional options will appear. First, you’ll be asked to choose the Hierarchy Item Column that matches what was in your file (typically Entity Name) from the drop-down menu. This is optional; if you’re not modifying the hierarchy ownership, skip this section.

If you indicate that you are updating the Hierarchy information, the “Default Hierarchy Item” drop-down menu will become required. If the information in your file does not match an existing Hierarchy item in you Catalog, the item you choose here will be applied as the default. If you are uploading courses for a single department at a time, you could choose that department from the list. If you are uploading course data from all over campus, we recommend setting the Institution as the default here.

Course Type

Below the Default Hierarchy selection, you will have the same options for updating Course Types. If your import does not include a Course Type column, you can skip this section.

When importing multiple course types, follow the same instructions given above for the Hierarchy. We recommend using “No Type” as the default to be applied for incorrect Course Types.

Additionally, when importing at the system level, you can decide if the changes made here should overwrite what is set at the Organization Level for a course. When the box is checked, the types determined in you import will be applied to all included courses regardless of whether or not those types were changed at the Organization Level. If the box is not checked, the import will only update types set at the System Level.

Active Status

The last default that you can set on this page is related to the status of your courses. Just as with Hierarchy and Course Type, if you are not updating the Active Status, skip this section.

If you are updating the status, choose the correct column and whether you would like courses to be marked Active or Inactive by default.

Once all necessary defaults are selected, click “Next” to continue.

Map Remaining Fields

On the next page, you will see a table listing all of the fields in your course template. The “Key” column on the left is used to determine the field used to identify and match courses in the file with courses in the Catalog. As a best practice, we recommend that you always use the “Course OID” field as the key whenever possible. When Course OID is chosen as a key, no other fields are needed. If the OID is not available in your file, you may check both Prefix and Code to act as the key. When you choose your
key, you’ll notice the field(s) will become red, meaning they are required. If a row in your file is missing this field, the import will not be run.

Use the drop-down menu to choose the column name that should be associated with each of the course fields. When the name of the field matches the terminology used in the Publisher, it will appear in bold. After selecting a column from the drop-down menu, a preview of data in that column will appear to the right. Above the table, you’ll also have the option of viewing additional examples.

If you do not want to update any of the fields listed, in this table, simply do not choose a column from the available drop-down menu.

**VALIDATE DATA MAPPING**

After mapping all fields in the file, you will click “Validate Choices” and the Publisher will check the file and tell you if any errors have been found. This validation is used to check that all courses in the file have an accurate Key field and that no courses are duplicated. For example, if the same Key is found in multiple rows of the file, the row numbers will be listed so you can correct the file and re-upload.

Next, you have the opportunity to review the data that is being imported. Just as with the mapping previews, you can choose to advance through each data row, or jump ahead to a random row.

Some fields may say “Not Mapped or No Import Data Found,” meaning you have either chosen not to update that field in this import, or the field is blank in the file.

Under the “Other Course Data” heading, you will be able to review changes that are not seen in the course details on the Gateway, such as Hierarchy Ownership, Course Type, and Active Status.

**RUN THE IMPORT**

When you’re satisfied with your review, click the “Run Import Now” button at the bottom of the page. You will be able to monitor the import process on the next screen.

**Please Note:** you do not have to remain on this page while the import runs; you can work in a different Catalog or even close your Publisher altogether and the import will continue to run in the background.

**Courses Import Review**

Before completing your Import, you will have the opportunity to review the changes that have been made. Navigate to the “Courses Import Review” tab at the top of the Module. You can search for a particular course, view a list of all courses, or choose to view only “those modified by the last import.” The course titles will act as show/hide links so you can make sure the courses are appearing correctly. Here you will see all course details, even those that were not modified in the import, so you can see exactly how the course will appear after finalizing the import.
**Last Import Notes**

Back on the main “Courses Import” tab, you will see a Summary of the last import that was run. This will let you see when the restore point was set, who created it, if the import lock is in place, when the import was run, the name of the file used, and who ran the import.

Additionally, you’ll find “Last Import Notes” which will tell you how many rows were processed, how many courses were updated, and how many were added new. Additionally, this is where you will be notified if any defaults were applied to courses.

**REMOVE RESTORE POINT & IMPORT LOCK**

Once you’ve reviewed the import notes, you will have two options: to cancel the import or to finalize the import.

Canceling the import will undo all changes made to the courses, backing up course data to the restore point that was established before running the import. This process will take at least as long as the import took to run.

Finalizing the import will delete the restore point and remove the import lock. After the import is finalized, you can resume working in the Catalog and, if necessary, publish the Catalog.

**Gateway Options Module**

The Gateway Options cannot be set at the System Level. You will need to choose an Organization before you can access the settings in this Module. Any changes that are made in the Gateway Options Module will be applied to the entire Gateway rather than to a selected Catalog.

**SETTINGS**

**Default FlashPoint Link Icons**

This first section allows you to modify those three default FlashPoint Link Icons. The current default FlashPoint Link Icons are shown to the right of their respective upload fields. FlashPoint Link icons must be a GIF, JPG, or PNG file under 64KB in size. They should also be under 50x50 pixels in size to avoid adversely affecting the Gateway layout.

To upload a new FlashPoint Link Icon, simply click the “Browse…” button, locate the new icon on your local or networked hard drive and click “Open.” Once you have uploaded all the icons you which to change click “Upload New Icon(s)” button to finalize the changes.
**Favorite Icon**

The favorite icon (also called a “favicon”) is displayed in some browsers’ navigation, bookmarks, and/or tabs and toolbars. Using a favicon is a simple way to add some additional branding to your Gateway. The current favicon is shown to the right of the upload fields (the favicon may not be shown inline in some browsers).

To upload a new favicon, simply click Browse … and locate the new icon on your local or networked hard drive. Select Open and then select Upload New Favicon. You must upload an ICO file that should be 16x16 pixels in size.

*Note:* Favicons are cached by web browsers. Once a new favicon is uploaded, you may need to empty your browser cache for the new favorite icon to update properly.

**Meta Tags**

Meta tags are invisible HTML tags embedded in a web page that describe the content of the web page. They are commonly used to improve placement in search engine rankings. Use of meta tags is not required.

**Description:** This should be a short description (under 100 words) of the Gateway and the content contained within it. Meta tag descriptions are displayed directly below the link to a site by some search engines. For instance, you might enter a description like, “Browse listings of University of Anytown Catalog content for the 2006-2007 calendar year.”

**Keywords:** Meta keywords are also used to help increase rankings in search engines. This should be a comma-separated list of keywords (under 100 words) that help describe the content on the Gateway. Ex. Catalogs, programs, courses, etc.

**Alerts and Portfolio Email**

**Archived Catalog Alert**

The text that you enter here is shown prominently on every Gateway Page of an archived Catalog.

**No Active Programs Available**

This text may be displayed in some filter links in place of programs when there are no active programs to display.

**No Active Courses Available**

This text will be displayed in some filter links in place of courses when no active courses are available for display.
Portfolio Return Email Address

This field will indicate the "from" e-mail address used in the email sent to a Gateway user who requests a forgotten portfolio password.

Search Options

Persistent Search Options: Use this field to select the options to include in the search tool shown directly above the Gateway navigation.

Search Location Names: These entries only apply if the selected Persistent Search Options setting includes the search location drop down. The Divisions text is the option in the drop down for all colleges and departments in the Catalog. The Other Content text is the option in the drop down for all custom page Catalog information. If necessary, both the text for Divisions and Other Content can be changed to meet the institution’s specific needs.

Search Location Default: This option allows you to choose the default option chosen in the search dropdown. This option will also cause locations to be pre-checked on the Gateway advanced search. This field is required if the search dropdown is shown.

Advanced Search Link Text: This is the text used as the link to the advanced search feature. If necessary, this text can be changed to meet the institution’s specific needs.

Search Results Shown Per Page: This is the number of list items displayed per page of search results. This applies to both the basic and advanced search. The maximum allowed value is 50.

Search Results Sorting: This option allows you to select the default sorting method for search results. Sorting by rank will show the closest search results first. Each user may override this setting when they use the Gateway search. This field is required.

Other Settings

List Archived Catalogs: By default, published archived Catalogs will be displayed in the Catalog dropdown on the Gateway. If you don’t want published archived Catalogs to be displayed in the dropdown, simply clear this check box.

Display Social Media Links: If checked, this will display Facebook and Twitter icons for any Gateway items that can be added to the Portfolio.

Support Email and Support Email Link Text: The support email address will be displayed on the Gateway and in the mobile application whenever it is appropriate to give users support contact information. If a Support Email Name has been entered, support email links will use it as the clickable text.
STYLES

This page allows you to modify some of the settings used in the Gateway’s Cascading Style Sheet (CSS). The Gateway CSS defines the look and feel of your Gateway and includes all the colors, fonts, spacing and even some images seen on the Gateway. Usually the Gateway CSS is designed to copy the look and feel of your institutional website. Major changes to the CSS (such as a redesign) still require that you contact Digarc for assistance. Smaller changes, however, may be completed via this page. The page contains a single form that specifies the text styles in several sections of the Gateway. The sections are described in detail below. Any changes that are made to the Gateway Styles will be live and immediate and will also be shown in the Publisher’s Catalog Preview module. Once a new style has been added, it will always be available, and unable to be deleted.

HEADER

You can have your own customizable header. The header will appear at the top of every Gateway page. The header might include your institution’s logo, links to your main institution locations. You can have an unlimited number of Gateway headers and header images. Only one Gateway header can be active at a time.