



# Acalog Usage Manual

Revision date: [11/2020]



*\*Note: This manual is proprietary in nature and should not be distributed or published in print or online.*



# Table of Contents

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<b>Table of Contents .....</b>	<b>2</b>
<b>Introduction.....</b>	<b>9</b>
Conventions Used in this Manual .....	9
About Acalog .....	9
<b>Using the Gateway.....</b>	<b>10</b>
.....	10
Selecting a Catalog .....	11
Searching Within a Catalog .....	11
Search Options .....	12
Browsing Within a Catalog .....	13
FlashPoint™ Links .....	13
My Portfolio.....	13
Create & Edit a Portfolio Account .....	14
Logging In & Out of the Portfolio .....	14
Printing Gateway Pages.....	15
Degree Planner .....	15
<b>Using the Publisher .....</b>	<b>16</b>
Login.....	16
Navigation Overview .....	17
Integrated Help .....	18
Recently Viewed Items.....	19
Selecting a Catalog .....	19
Edit Locking .....	20
Using the WYSIWYG Editor .....	21
Toolbar Features.....	21
<b>Publisher Home Module .....</b>	<b>30</b>



- Acalog University and Community ..... 31
- Support ..... 31
- Organizations Module ..... 32**
  - Catalogs Assignment ..... 32
- User Accounts Module ..... 33**
  - My Account ..... 33
  - All Accounts ..... 34
    - Create a New Account ..... 34
    - Edit & Delete User Accounts ..... 43
  - Version Auditing Groups ..... 44
    - Create a Version Auditing Group ..... 44
- Account Types Module ..... 46**
  - Create or Edit a Custom Account Type ..... 46
  - Delete an Account Type ..... 48
- Catalogs Module ..... 49**
  - Catalogs ..... 49
    - Re-Order Published Catalogs ..... 50
    - Create a New Catalog ..... 51
    - Edit or Delete a Catalog ..... 53
  - Catalog Types ..... 54
- Catalog Preview ..... 55**
- Gateway Options Module ..... 56**
  - Settings ..... 56
    - Default FlashPoint Link Icons ..... 56
    - Favorite Icon ..... 57
    - Meta Tags ..... 57
    - Alerts and Portfolio Email ..... 57
    - Search Options ..... 58
    - Other Settings ..... 59

Rev. [11/2020]

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<b>Styles</b> .....	<b>60</b>
Add a New Style.....	61
Modify Gateway Styles .....	61
<b>Header</b> .....	<b>63</b>
Set the Active Gateway Header .....	63
Create a New Gateway Header .....	63
Create a New Remote Header .....	63
Preview a Gateway Header .....	64
Edit a Gateway Header .....	64
Delete a Gateway Header .....	64
Copy a Gateway Header .....	64
Upload Header Images .....	64
Check Header Image Usage.....	64
Preview Header Images.....	64
Delete Header Images .....	65
<b>Mobile Application</b> .....	<b>65</b>
Application Settings .....	65
Styles .....	67
<b>Gateway &amp; Content Module</b> .....	<b>69</b>
Navigation .....	69
Re-Ordering Navigation Items .....	71
Filters.....	72
Creating a New Filter .....	73
External Links .....	88
Custom Pages.....	89
Media Files .....	90
<b>PermaLink Usage Module</b> .....	<b>92</b>
<b>Item Types Module</b> .....	<b>93</b>
Creating and Editing an Item Type .....	93
Deleting an Item Type .....	94

Rev. [11/2020]

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**Hierarchy Module..... 95**

- Structure and Ordering ..... 97
- Create a New Hierarchy Item ..... 98
- Editing a Hierarchy Item ..... 99
- Program & Course Display ..... 100
  - Programs ..... 100
  - Courses ..... 100

**Programs & Cores Module..... 101**

- Programs ..... 104
  - Create a New Program ..... 104
- Shared Cores ..... 111
  - Create a Shared Core ..... 111
  - Shared Core Usage..... 116
  - Attach a Shared Core to a Program ..... 116
- Ad-Hoc Text ..... 116

**Courses Module..... 118**

- Manage Courses ..... 119
  - Create a New Course ..... 120
  - Edit course ..... 120
  - Delete course ..... 120
  - Attachments ..... 120
- Courses Template ..... 121
  - Field Type ..... 123
  - Course Title/Body Separator ..... 124
  - Re-Ordering Fields ..... 124
  - Managing Course Fields ..... 125
  - Program Display Field..... 127
  - Display Item..... 127
  - Courses Template Display Example ..... 127
- JSON to the Rescue ..... 128

Rev. [11/2020]

Proprietary & Confidential





- Convert Existing Data to JSON ..... 129
- FlashPoint™ Links Module ..... 131**
  - FlashPoint link examples..... 131
    - Hierarchy Items..... 131
    - Programs..... 131
    - Courses ..... 131
  - Create a New FlashPoint Link ..... 132
    - Step 1: Give Your FlashPoint Link a Name..... 132
    - Step 2: Decide How You Want Your FlashPoint Link to Display on the Gateway..... 133
    - Step 3: Create Your FlashPoint Link Resource..... 133
    - Save & Assign..... 134
  - Copy a Flashpoint link ..... 134
- Version Auditing Module..... 136**
  - Version auditing configuration ..... 136
    - Global Settings ..... 136
    - Catalog Specific Settings..... 138
  - User Accounts Enhancements..... 139
    - Version Auditing Relationships..... 139
    - Version Auditing Groups ..... 140
  - Tracking Changes ..... 140
  - Audit Event Alerts ..... 142
    - An Editor Makes Changes and Sends an Alert ..... 142
    - View Response & Advance Version Status ..... 143
    - Final Manager Review ..... 143
  - Route Event Alerts ..... 144
    - Sending a Route Event Alert..... 145
    - Reviewing a Route Event Alert..... 145
- Export Module: Catalog..... 146**
  - Review content ..... 146
    - Review Custom Pages ..... 146

Rev. [11/2020]

Proprietary & Confidential

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- Review Filters..... 146
- Generate the Export ..... 147
  - Create a Print Styleset..... 147
  - Create an Export map..... 149
  - Queue the Export..... 149
- Download the Export..... 151
- Review and Format the Export..... 151
  - Adjust Spacing..... 151
  - Combine and Format Documents ..... 153
- Export Module: Courses ..... 155**
  - File Modifications ..... 155
    - Modify Existing Courses ..... 155
    - Add New Courses ..... 157
- Courses Import Module..... 158**
  - Restore Point & Import Lock ..... 158
  - Upload & Validate Data File ..... 158
    - Troubleshooting: Duplicate Header Rows..... 159
  - Map Defaults & Columns ..... 159
    - File Contents ..... 159
    - Hierarchy, Types, and Status..... 160
    - Validate Data Mapping ..... 160
  - Run Import ..... 161
  - Remove Restore Point & Import Lock ..... 162
- Remote Services Module ..... 163**
  - Remote Services Module (API)..... 163
    - Web Services APIs ..... 163
    - Widget API..... 163
  - Variable Replacement URL..... 163
- Portfolio Options Module ..... 164**



Show "Contact Me" option ..... 164

**Portfolio Accounts Module ..... 165**

Export ..... 166

# Introduction

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## CONVENTIONS USED IN THIS MANUAL

We have attempted to make this manual as easy to read and navigate as possible. To that end, a few basic conventions will be used throughout the manual.

As all web browsers render web pages differently, the screenshots used in this manual may differ slightly from what is displayed in your web browser. These images are intended as reference only and were taken using the Firefox browser.

DIGARC supports the current and previous major releases of Chrome, Firefox, Edge, and Safari on a rolling basis. Each time a new version is released, we begin supporting that version and stop supporting the third most recent version.

Many places in this manual will refer to other sections for additional information. Such references will be underlined links. For example: “For more information, see the [Conventions Used in this Manual](#) section.”

Any important notes or shortcuts that relate to a section will appear in bold and italics. For example:

**Note:** *The deletion of a course cannot be undone.*

Some sections will describe additional features only available to Acalog Enterprise Edition users. These features will always follow a header that reads **Enterprise Edition Specific Features** and will appear with a faint green background like the one seen behind this paragraph.

## ABOUT ACALOG

The goal of Acalog is to centralize administration and public use of all your academic catalogs via a straightforward, web-based interface.

Acalog is made up of two main websites:

- **Publisher** - the administrative side of your Acalog; the Publisher allows you to manage all the data in your catalogs.
- **Gateway** - the public side of your Acalog; the Gateway allows anyone with Internet access to view your published catalogs.

**Note:** *This manual includes information about third party software used within Acalog. Such open source software is not developed or maintained by DIGARC.*

# Using the Gateway

Browsing the Gateway is accomplished by clicking on navigation links located on the left-hand or right-hand side of the Gateway. The top link is always the Catalog Home page and will take the user to the front page of the catalog they are currently viewing.

Several buttons are available in the upper-right corner of pages on the Gateway - which buttons appear may vary based on the type of content you are viewing. For example, the print degree planner icon will only be available when viewing programs.

Pictured here are the following icons (from left to right): *Print Degree Planner, Add to Portfolio, Share, Print-Friendly, and Help.*

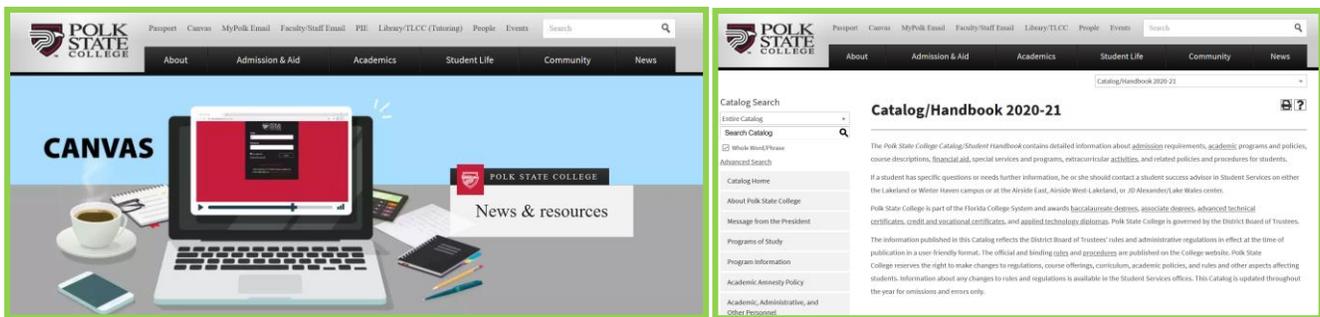


**Note:** *The icons available in your individual Gateway may vary based on decisions your institution makes.*

Help will open in a pop-up window and will offer directions on how to locate information on the Gateway. Other buttons will be covered in more detail later in this manual.

As part of your initial implementation, the style of your Gateway will be set up to match the style of your Institutional website. If you change the appearance of your Institutional website, we offer one free re-integration each year as a part of your Support and hosting agreement. To have the appearance of your Gateway updated, please contact our Support team by using the Support widget found in the bottom left corner of your Publisher.

*An example of an Institutional website (left) and matching Gateway (right).*





## SELECTING A CATALOG

There may be several catalogs published to the Gateway at any given time. At the top of the Gateway, a drop-down menu will list all available publications - the default one will be at the top of the list. To select a different catalog, make your choice from the drop-down menu. After you make the selection, the Gateway will refresh and direct you to the home page for that catalog. If there is only one published catalog, there will not be a drop-down menu.

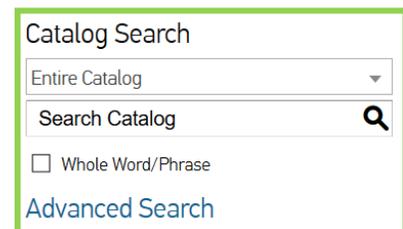
Archived Catalogs may also be available from the drop-down menu. If an archived catalog is chosen, you will see an alert at the top of every page within the archived catalog. This alert is to notify users that they may be viewing outdated information - helpful if they have navigated here from an older bookmark, link, or search result.



**Note:** The default text for Archived Catalogs will be [Archived Catalog], however this may be customized at any time. All catalogs marked as archived will display the same alert across all pages of their Gateways. To customize your Archived Catalog Alert, see the [Gateway Settings](#) section of this manual.

## SEARCHING WITHIN A CATALOG

The Catalog Search feature will appear at the very top of the navigation on your Gateway. Your users can use the catalog search to quickly find content throughout your catalog. The way this search appears can be changed - you can choose if you'd like to include the location, whole word checkbox, and how the advanced search text will appear; although it is a global setting and changes will impact all catalogs.



The search includes an option to limit search results based on location - allowing you to search only within your Courses or Program information, as well as selecting the whole word/phrase checkbox to ensure it looks for an exact match.



The search results returned will be sorted based on location and, by default, will be limited to 5 results per page per section. These results may be sorted alphabetically or by rank (how relevant the content is to your search query) - and the user may choose which way they would prefer to view those results.

Each instance where a match is located will be highlighted within the results, and if you click on any of the links in the results you will be directed to the location of the catalog where the content can be found, with the match still highlighted within the page.

**Courses - Keyword/Phrase Matches**

Results for any term in "english".

- [BLED 412 - Second Language Literacy for English Language Learners](#)
- [ENG 403 - The Discipline of English](#)
- [ENG 457 - Teaching English as a Second Language](#)
- [ENG 471 - Survey of English Literature I](#)
- [BLED 413 - Sheltered Content Area Instruction for English Language Learners](#)

Page: 1 | 2 | 3 | 4 | 5

**BLED 412 - Second Language Literacy for English Language Learners**   

Hours: Three

Current approaches to the teaching of reading and writing in English to bilingual and ESL students in grades PK-12. Students will assess the oral Language and literacy skills of English Language Learners and design, evaluate, and modify/adapt commercial and research-based instructional materials to meet identified needs.

**Note:** The search can be customized in the Settings tab of the Gateway Options Module.

### Search Options

Further search options may be available by clicking on the "Advanced Search" link within the Persistent Search box above the navigation or by choosing to modify search options on the results page.

While using the advanced search feature, you may also choose to view a list of course prefixes to help refine your search results.

**Search Options**

Choose search locations to narrow or expand your search.

Enter a keyword or phrase

Find whole word or phrase only.

Search Locations

- Courses [Show prefix list.]
- Programs
- Schools & Departments
- Policies and Other Non-Academic Content



## BROWSING WITHIN A CATALOG

The navigation will contain links to the major sections of catalog content. There are several different types of links that may appear in the navigation:

- **Custom Pages** - these are static pages of narrative content such as Policies, Financial Aid, or Faculty listings.
- **Filters** - these are dynamic pages that will automatically populate, and update based on preset parameters; for example, a list of all courses within the catalog.
- **External Links** - these links will point to pages outside of the catalog from directly within the navigation; for example, a link back to your institutional website.
- **Media Files** - these links will open a file or resource that has been uploaded to the catalog; for example, a PDF of your campus map.

## FLASHPOINT™ LINKS

A FlashPoint Link is a way to add interactive media to your e-catalog and can be in the form of either text or a graphic and may link to a URL or an uploaded resource. FlashPoint Links can be attached to hierarchy content, programs, or courses. When attached, these links will appear in the upper-right corner of the page near the print and share icons - and for hierarchy, to the right of the item in a filter page.



For more information, see the [FlashPoint Links](#) section of this manual.

## MY PORTFOLIO

In the upper-right corner of the page you will see a star icon  that allows you to save items to a Portfolio to be referenced later. The default title for this feature is “My Portfolio”, but this term can be customized for you if you would prefer. Custom terms like “My Favorites”, “My Bookmarks”, or “My Backpack” have been popular with other institutions. To request a change to this term, you can contact Support using the Support widget in the bottom left corner of your Publisher. For more information on setting up the Portfolio, see the [Portfolio Options](#) section of this manual.



## Create & Edit a Portfolio Account

If an Account-Based Portfolio is selected, users will need to enter an email address and password to create an account.

You may also have a checkbox to request contact from someone at your institution, as well as providing your name and a field for additional notes, depending on the settings the catalog manager has selected. When you request contact, you are giving permission for the Institution to view your Portfolio Account information.

After creating the account, you will be logged in. Any items you had previously marked to be added to your Portfolio will now be stored in your account unless you choose to manually remove them.

**Note:** The request contact checkbox, name fields, or comment box may not be available depending on how the Catalog Manager has configured the Portfolio Options.

To edit your portfolio account information, you will first need to log in. Next, click the “Edit Profile” link in the upper right corner of the page. You may change your account login by entering a new e-mail address.

To change your password, click “Change Password”. A pop-up window will prompt you for a new password. Enter and confirm your new password and click “Reset”. When you are finished, you may close the pop-up window.

## Logging In & Out of the Portfolio

To login to your portfolio, simply navigate to “My Portfolio” and enter the e-mail address and password you registered with.

If you have forgotten your password, enter your e-mail address and click “Reset Password” to have your password sent to you.

**Note:** It is important to use a valid e-mail address when creating an account in case you ever forget your password as this is a system generated action.

To logout, simply view your Portfolio and click “Logout” in the upper right corner of the page.



## PRINTING GATEWAY PAGES

You may easily print most pages on the Gateway by using the Print-Friendly icon  in the upper-right corner of the page. Clicking the icon will open a pop-up window containing just the content of the page—the custom header, navigational elements, and colors are stripped from the page to generate a print-friendly version. You can then click “Print this Page” to choose the appropriate printer and complete the printing process.

If you are printing a courses filter, you will have an option to Expand All Courses prior to printing, which will print the courses with their full descriptions displaying rather than just a listing of them.

**acalog University**

---

**Literature and Languages**

[Print this Page](#)

---

Attardo (Head), Baumgardner, Bolin, Carter, Duchovnay, Dunbar-Odom, Fernandez-Babineaux, Foreman, Fulkerson, Gibbs, Hayes, Jacobs, Jonz, Lyons, Reid, Roggenkamp, Royal, Seminet, Smartt, Stewart

## DEGREE PLANNER

In addition to using the Print Friendly button to print content from the Gateway, when viewing a program on the Gateway, you may see the Degree Planner icon  in the upper right-hand corner. Selecting this icon will generate the contents of the program in a simple form that is designed to be printed and written on.

There are two versions of the Degree Planner.

In the first, you will have the ability to include fields from your courses template within the degree planner, which will be discussed in the [Courses](#) section of this manual.

The headings of the columns that appear, such as “Grade” or “Gen Ed” may be modified by contacting our Support team, using the Support widget found in the bottom left corner of your Publisher.

Student ID: _____	Catalog: Undergraduate Catalog 2019-2020
Student Name: _____	Program: Spanish B.A.
Adviser Name: _____	Minimum Credits Required: _____
<b>Spanish B.A.</b> <span style="float: right;">^</span>	
This plan of study is for students who wish to earn a B.A. degree in Spanish. It requires twenty-seven semester hours of Spanish beyond the elementary level. Students who are considering teaching in high schools or middle schools and plan to pursue emergency permits should follow the course requirements for English or language arts teacher certification.	
<b>Required courses in the major (36 sh)</b> <span style="float: right;">^</span>	
• Four additional advanced (300-400 level) Spanish courses	
<b>Course Name</b>	<b>Completed</b>
SPA 131 - Elementary Spanish I	<b>Grade</b>
SPA 132 - Elementary Spanish II	<b>Needed</b>
SPA 231 - Intermediate Spanish I	
SPA 232 - Intermediate Spanish II	
SPA 331 - Spanish Conversation for Oral Proficiency	
SPA 333 - Spanish for Heritage Speakers I	





The second version of the Degree Planner is more of an informational listing of all core and course data. To use this Degree Planner, you will need to have the Widget API enabled, via a Support ticket.

You can choose which Degree Planner you wish to use on a catalog-by-catalog basis.

The degree planner may be turned on or off on a catalog basis; this feature and the option to hide the program description content will be determined within the [Catalogs](#) module, and discussed in more detail within that section of the manual.

REQUIRED COURSES IN THE MAJOR (36 SH)	
• Four additional advanced (300-400 level) Spanish courses	

LITERATURE	
SPA 332: Spanish Composition and Grammar	Hours: Three
SPA 334: Spanish for Heritage Speakers II	Hours: Three
Plus 9 sh from:	
SPA 353: Spanish Culture and Civilization	Hours: Three
SPA 354: Latin American Culture and Civilization	Hours: Three
SPA 471: Literature, history and society of Latin America I: From Re-Columbian to Modernismo	Hours: Three
SPA 472: Literature, history and society of Latin America, II: From Modernismo to the Present	Hours: Three

**Notes**

- Spa 335-Spanish for TOPT does not count toward the major.

SPA 131: Elementary Spanish I	Hours: Three
SPA 132: Elementary Spanish II	Hours: Three
SPA 231: Intermediate Spanish I	Hours: Three
SPA 232: Intermediate Spanish II	Hours: Three

## Using the Publisher

The Publisher is the administrative end of the system, and what you will use to manage your catalog content. The Publisher includes features such as Version Auditing, FlashPoint Links, Catalog Export, and Catalog Archiving.

If you have the Enterprise Edition of Acalog, you will also have access to the Organizations Module, which allows you to manage multiple Gateways from a single Publisher.

### LOGIN

The Publisher is a secure website that is password protected against unauthorized access - you **must** have a user account with an active status to be able to gain access. To log in, enter your username and password and click "Login."

If your username and password combination are invalid, ensure that your caps lock is disabled - keep in mind that the password is case sensitive.

If your username and password combination does not work after several tries, contact a Catalog Manager or your system administrator for help.

Acalog is also compatible with remote authentication - commonly referred to as 'SSO' or single-sign-on. This will allow users to authenticate using credentials already established within your Institution. For information on options regarding compatibility and requirements, please contact [support@digarc.com](mailto:support@digarc.com) for more information on how to implement these options.

**Note:** Acalog does not provide an option to reset a lost or forgotten password. If you are unable to recall the password, you will need to contact a Catalog Manager to reset the password for you to gain access.

Sign In

Username: \*

Password: \*

Sign In



## NAVIGATION OVERVIEW

After logging in, there will be a persistent navigation within the Publisher. Each category points to a series of modules within Acalog. The modules available to you in this navigation will vary based on your Account Type and may include some or all of the following:



- [Publisher Home](#)
- [Organizations](#) (*Enterprise Edition only*)
- [User Accounts](#)
- [Account Types](#)
- [Catalogs](#)
- [Gateway Options](#)
- [Gateway & Content](#)
- [PermaLink Usage](#)
- [Item Types](#)
- [Hierarchy](#)
- [Programs & Cores](#)
- [Courses](#)
- [FlashPoint Links](#)
- [Version Auditing](#)
- [Courses Import](#)
- [Export](#)
- [Remote Services](#)
- [Portfolio Options](#)
- [Portfolio Accounts](#)

Each category offers tools and features for managing different types of data. The module navigation is divided into five distinct sections based on the type of data they are used to manage.

Within each module, you will find navigational tabs at the top of the Publisher. For example, within the User Accounts Module, you will have two tabs: “My Account” and “All Accounts”. When you click on a navigational item (module or tab), the name will change color as a reminder of which area you are currently working in.



When editing a specific item, you will have a series of sub-tabs for that item. These tabs may include some or all of the following:



- **Summary** - this is the default tab when you first select any item and provides basic information about the item you're viewing, including when the item was created, when it was last modified, and by which user.
- **Edit** - select this tab to make changes to an item. If you do not see this tab, you do not have permission to edit an item.
- **Preview** - selecting this tab will launch a new window demonstrating what the selected item will look like when viewed from the Gateway. The Publisher preview will contain all of the same elements of the Gateway except three: the header will not appear the top of the page, you will not be able to change catalogs from within the preview, and the My Portfolio feature will not function.
- **Version Auditing** - if Version Auditing is enabled in your Publisher, you will be able to view a history of changes in this tab, create new snapshots, alerts, or routes. To learn more about the tools available within this tab, please see the section for [Version Auditing](#).
- **New** - this tab will act as shortcut for creating a new item of the type you are currently viewing without navigating back to the main module page.

<b>Page Header:</b>	Administrative Procedures
<b>Navigation Link Label:</b>	Administrative Procedures
<b>Status:</b>	Active-Visible
<b>Creation Date:</b>	09/12/2013 16:58:48 by Digital Architecture
<b>Last Modified:</b>	06/04/2020 11:21:34 by Mara Sansolo

## INTEGRATED HELP

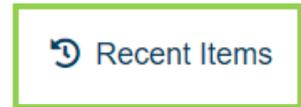
A contextual help icon  is available in the upper-right corner of the Publisher at all times. Clicking this link will open the help in a pop-up window and it will display content based on what you are currently reviewing within the Publisher.

You can print any section of the help using the print icon .

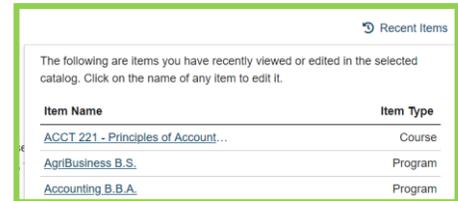


## RECENTLY VIEWED ITEMS

To the left of the help icon , you may see a link to “Recent Items” . This link acts as a shortcut for returning to items you have recently viewed or edited and is specific to your user account. Clicking the link will open a tooltip containing the recent items and choosing an item in this list will take you to the Summary tab for that item.



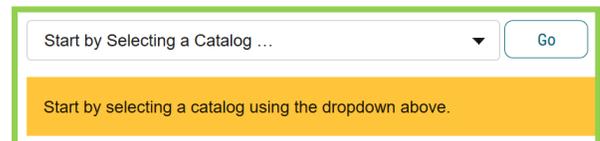
The “Recent Items” link will display the last fifteen items that were viewed in your currently selected catalog and will be different for each catalog. This link will only appear for a user who has viewed or edited items in the selected catalog.



## SELECTING A CATALOG

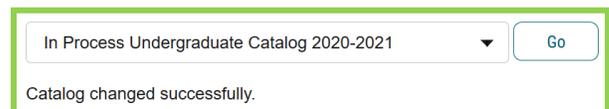
As a Best Practice, the very first step we suggest that you take when working in the Publisher is to select the catalog you will be working in. Selecting a catalog indicates the specific catalog you will be making changes to - no matter how many catalogs or versions of your catalog may exist within the Publisher, edits you make to the selected catalog will only affect that single catalog. The catalog you select will become the current catalog and will be displayed at the top of any page where you edit Catalog Specific content.

**Note:** The catalog drop-down is not shown on pages that do not require a current catalog to be selected. For example, if you click the User Accounts module, you will not see a current catalog.



To choose a catalog, use the drop-down menu at the top of the Publisher and click “Go”. The menu will list all catalogs in the Publisher, even those that have not been published to the Gateway.

Once you have selected a catalog, the Publisher will confirm the selection with text appearing below the drop-down menu. The selected catalog will remain visible in the menu while you work within the Publisher.



**Note:** If you attempt to navigate to a section of the Publisher that requires you to select a catalog, for example, the Gateway & Content Module, you will be prompted to select a catalog before you can continue.

You may also see abbreviations after the catalog name, as described below:

- **L** - Locked; this catalog can only be edited by Manager-level users.
- **P** - Published; this catalog can be viewed on the Gateway.
- **A** - Archived; this is an older version of a given catalog type and will have the archived catalog alert across the top of every page when viewed from the Gateway.



- **IL** - Import Locked; a course import is in process for this catalog, prohibiting any other changes until the import is complete.

## EDIT LOCKING

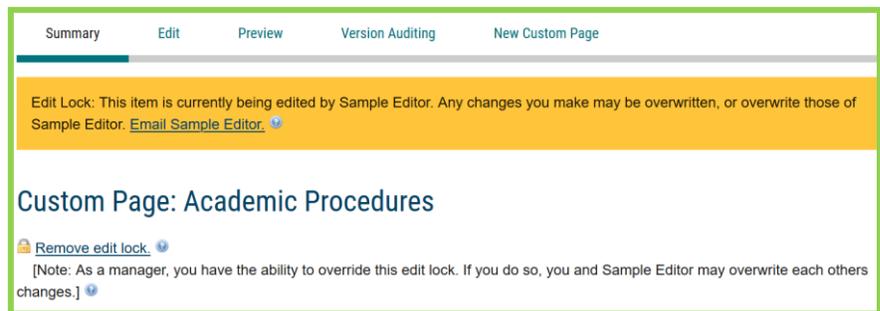
Edit locking is a feature designed to prevent users from overwriting each other's changes to catalog content.

When a user edits an item in Acalog, the item will be edit locked by that user. If any other user navigates to the item, they will see the edit lock and the name of the user currently editing the item.

If you are the user who is editing an item, you will see the edit lock in place at the top of the page. This will not prevent you from making any changes to the content. If you click "Remove edit lock", you are removing the edit lock that you have placed - allowing other users to modify the item. This will place you on the Summary page for the item, and if you need to make further edits you can select the Edit tab again and resume.



If you are attempting to access an item and you are unable to edit it, you will see the additional orange text at the top of the page informing you of which user is currently modifying the content.



A manager level user can remove the edit lock and potentially overwrite the changes; any other level user may contact the user to request access.

**Note:** Edit Locks will also be removed after a period of inactivity or when the user holding the lock logs out of the system.



## USING THE WYSIWYG EDITOR

The WYSIWYG Editor is a “what you see is what you get” text editor and is used throughout Acalog to manage content in your catalog. There are many applications that use a WYSIWYG type of editor, so while many of the features may be familiar to you - some will be unique to Acalog and learning how to use the WYSIWYG editor is a fundamental part of working in your Publisher to maintain your catalogs as it will appear in many different modules.

Below you can see the WYSIWYG toolbar. To make working in the editor easier, you can use the maximize icon  in the toolbar to maximize the editor to take up your full browser window. To see the rest of the page again, click the same icon to minimize.



### Toolbar Features

 The **Quick Save** icon is used to save the contents of the WYSIWYG editor. It will **not** save changes to other fields on the page such as Active Status, Navigation Link Label, Page Header, etc. After saving, you will see a pop-up letting you know that your changes have been saved successfully.

As a Best Practice, we suggest using the save at the bottom of the page rather than using the quick save. If you do choose to use the quick save, be sure that you use the save at the bottom before navigating away from the page.

**Note:** You may not see this icon in your toolbar if it has been disabled in the Version Auditing Module.

 The **Print** icon is used to print the contents of the editor. This will print the content exactly as it appears within the editor, not as it would appear on the Gateway.



 The **Preview** icon is used to preview the contents of the editor in a pop-up window. All changes will be seen in the preview, even if the changes in the editor have not yet been saved. The preview will display with the applicable HTML but none of the Gateway styles - meaning you will not see the header, navigation, width or spacing constraints of the Gateway.

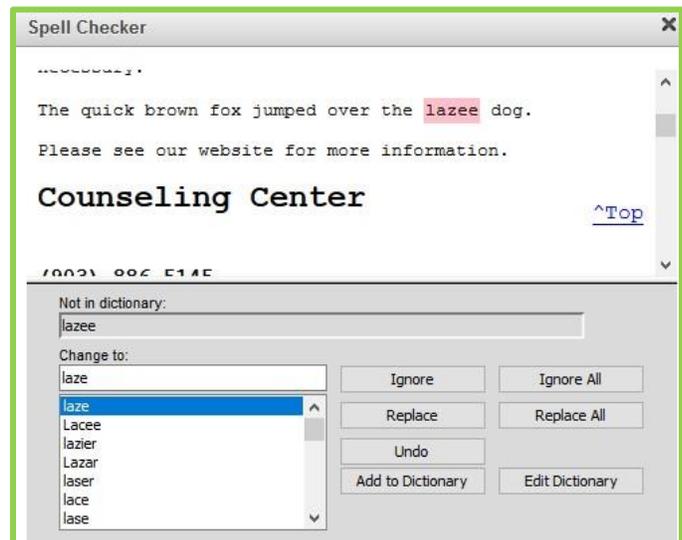
To preview the content exactly as it will appear on the Gateway, the user will need to first save the page and then select the Preview tab for the item.

  The **Spell Check** and **Edit Dictionary** icons are used to check for spelling errors and manage your personal dictionary.

When using the Spell Checker, selecting “Ignore All” will only ignore instances of a word in the current editor, however you can choose “Add to Dictionary” for words that will appear in multiple pages throughout the catalog.

Editing the dictionary will let you remove words you had previously added to your personal dictionary. The words saved to the dictionary are specific to each individual user - it is not possible to preset a list for all users within your Publisher.

**Note:** *The language used for the Spell Check is the default built into the editor and cannot be changed.*



 The **Paste as Plain Text** icon launches a dialog box that allows the user to paste content into the editor, stripping all formatting from the original source. The user must use CTRL+V (⌘+V for Mac users) to paste the text into the box, then click “OK”.

As a Best Practice, it is recommended that users always paste as plain text as this allows styles in Acalog to be applied consistently across all pages of your Gateway; pasting directly into the editor can result in display errors on the Gateway.

 The **Undo** icon can be used after making any changes. Clicking the icon will undo the previous change made - and you can click it multiple times to undo several actions up until the last time the page was saved or the first edit was made in this session. You may also use the keyboard shortcut CTRL+Z (⌘+Z for Mac users).

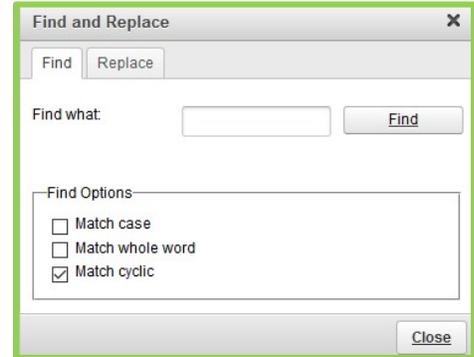
 The **Redo** icon will only become available if you used the undo icon or keyboard shortcut to undo a change. You can also use the keyboard shortcut CTRL+Y (⌘+Y for Mac users).



The **Find** and **Replace** icons can be used to quickly locate and change specific words in the editor and functions just as the find/replace feature does in many word processing programs you may be used to.

Clicking either icon will open the “Find and Replace” dialog box, which has individual tabs you can switch between depending on if you need to find or replace a word.

**Note:** The find and replace feature will only search the contents of the current page selected. There is not a global find and replace within Acalog.



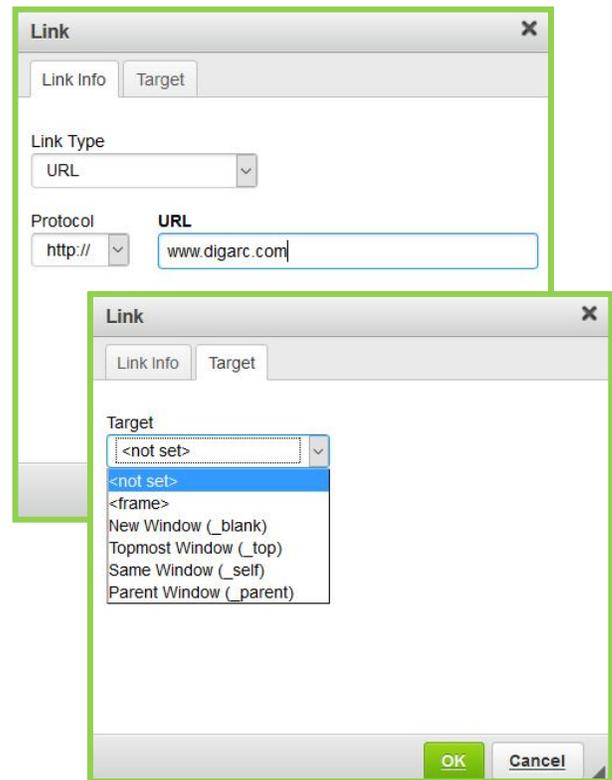
The **Insert/Edit Link** icon is used to create a new hyperlink or edit an existing hyperlink that is selected.

Clicking the insert/edit link icon will open the “Link Properties” dialog box, which allows the user three different link options: URL, E-mail, or Link to an Anchor.

The default link type will be URL - allowing you to direct users to another website outside of your catalog.

The Protocol drop-down menu will default to “http://” so you do not need to type this part of the URL when you enter the rest of the web address in the “URL” box. Type in the complete URL of the address the user will be directed to, including the “www.” and the “.com.”

Once the address is entered, select the Target tab at the top. As a Best Practice, it is recommended to have any link that directs the user away from the catalog content open in a new window. Select New Window from the drop-down menu and click ok.





The link dialog box may also be used to insert a clickable e-mail address that will launch the end user’s e-mail client. As a Best Practice, we do suggest that you ensure that any e-mail address listed in the catalog is a clickable link.

To create an e-mail link, select “E-Mail” from the drop-down menu and enter the e-mail address. A default subject and body text may also be provided if you would like to prepopulate the e-mail.

When a user on your Gateway clicks an email hyperlink, it will open the user’s default email client and fill in the information that you’ve entered here.

The third type of link available is “Link to anchor in the text.” This option allows the user to create anchors within the same page and then link to those anchors for same-page navigation.

To create a link to an anchor, select the text you wish to create as a link and select the Insert Link icon, then change the Link Type drop-down menu to “Link to anchor in the text.” In the “Select an Anchor” section, use the “By Anchor Name” drop-down menu and select the anchor you would like to link to.

**Note:** Before you can create the link, you will need to create the anchor you would like to link to.

**Note:** This type of link is for linking to anchors within the same page only. If you wish to link to anchors within another page of the catalog, you’ll need to use Permalinks instead.



The **Remove Link** icon is used to remove the link functionality from text within the editor. To remove the link from text, select the text and click the icon. You can also right-click on a link and select ‘remove link’ from the contextual menu.



The **Insert/Edit Anchor** icon is used to place anchors that you can then link to as described above.

**Note:** We know it seems a little odd that the icon depicts a flag when the tool is called an anchor and hovering over the icon will reveal a tooltip indicating the text “Anchor” as well. The icon was a design choice by the developer of the editor.

Place your cursor in the editor to indicate where the anchor should be created. Anchors are often created for headings to direct users to specific sections of content; if placing the anchor for a heading, place your cursor at the beginning of the line.

The screenshot shows the 'Link' dialog box with the 'Link Info' tab selected. The 'Link Type' dropdown is set to 'E-mail'. The 'E-Mail Address' field contains 'training@digarc.com'. The 'Message Subject' and 'Message Body' fields are empty. The 'OK' and 'Cancel' buttons are at the bottom right.

The screenshot shows the 'Link' dialog box with the 'Link Info' tab selected. The 'Link Type' dropdown is set to 'Link to anchor in the text'. The 'Select an Anchor' section has two options: 'By Anchor Name' and 'By Element Id'. The 'By Anchor Name' dropdown is open, showing a list of anchors: 'University\_Purpose', 'The\_Campus', and 'Student\_Housing'. The 'OK' and 'Cancel' buttons are at the bottom right.



**Note:** Be sure that text is not highlighted when you click the anchor icon as this will cause a display error when a user hovers over the heading on the Gateway.

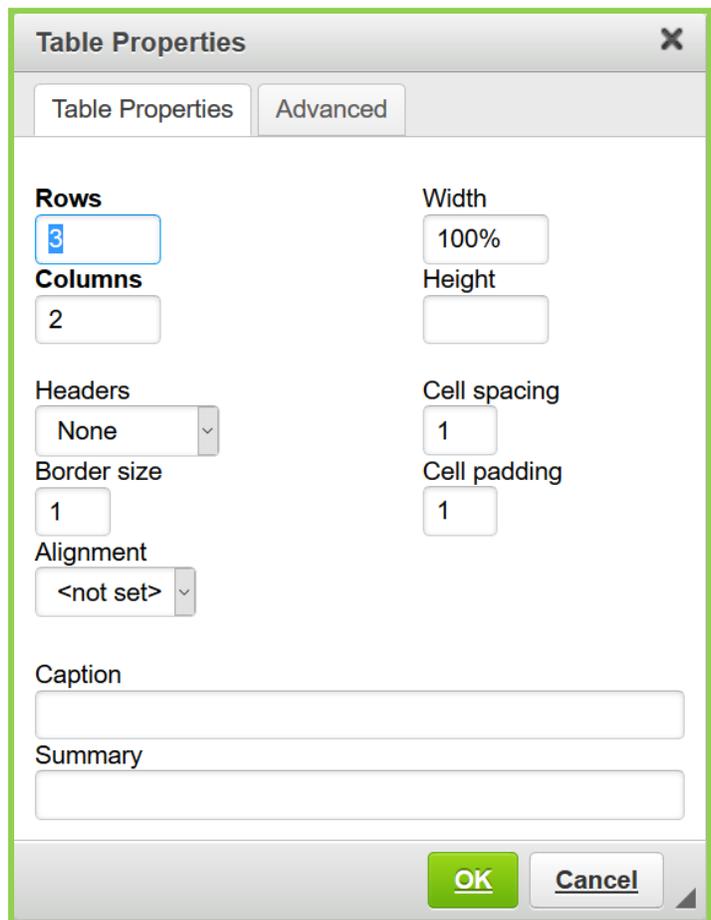
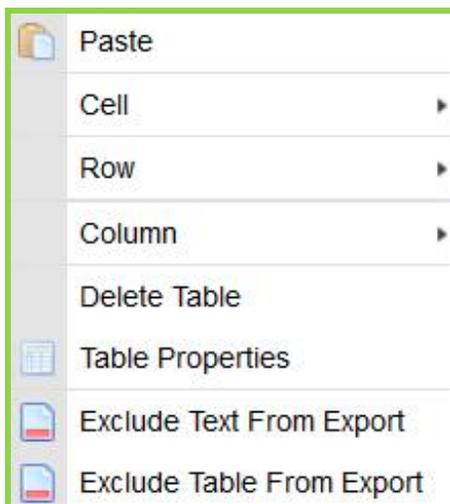
In the “Anchor Properties” dialog box, enter the anchor name. Anchor names must begin with a letter and may contain any number of letters, digits, hyphens, underscores, colons, and periods. After entering the anchor name, click “OK” and the anchor will appear as a red flag in the editor. You can use the same icon to edit the anchor or right-click to edit/remove the anchor.

**Note:** Spaces and special characters are not allowed and will be replaced by hyphens if entered.

 The **Insert/Edit Table** icon will open the “Table Properties” dialog box, which allows users to determine the settings of the table before inserting it into the page. You can adjust the size of the table, number of rows/columns, border and spacing, and even caption your table.

As a Best Practice, we recommend that you always use a percentage when setting the width of your table. Defining the pixel count will create a fixed width which can cause display errors on the Gateway and when being viewed on devices with smaller screens.

Once a table has been added, the user can right-click (or command-click) on the table to access the contextual menu. From here, you can add/remove rows and columns, edit Cell Properties, Delete the table, access Table Properties again, or exclude table content from Export.



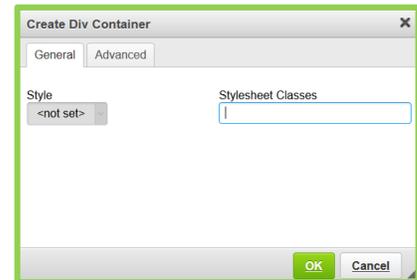


 The **Show Blocks** icon can be toggled on and off to show outlines around all blocks of text in the editor. Blocks will be labeled “P” for normal paragraphs and “H2” or “H3”, etc. for Headers of various sizes. Users may find it helpful to see the boundaries of the formatting blocks when editing content.



 The **DIV** icon Allows you to create a responsive anchor list at the top of your Custom Pages, that will scale, based on the size of the screen. The Sylesheet Classes, which determine the number of columns are:

- div-2col
- div-3col
- div-4col

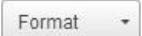


 The **Select All** icon will select all content in the editor. You may also use the keyboard short cut CTRL+A (⌘+A for Mac users). Click anywhere to de-select text.

 The **Remove Format** icon is used to remove any custom styles that have been added to selected text, but this icon will not remove formatting such as Headers that have been applied.

 The **Styles** drop-down menu is used to apply custom styles to selected text. If the Styles drop-down menu does not appear in your toolbar, no custom styles have been added in your Publisher. Managers can add custom styles in the [Gateway Options](#) Module.

**Note:** *Once a manager has added a custom style to the Publisher, they will be available for all users within all catalogs immediately, and they cannot be deleted. It is recommended that only someone with experience working with HTML and/or CSS manage the styles - if you need any assistance, you can contact the Support team using the Support Widget from the bottom left corner of your Publisher.*

 The **Format** drop-down menu is used to apply formatting elements such as headings. These formatting elements will appear the same throughout the Gateway on every catalog based on the styles set during Gateway integration.

**Note:** *Formatting is applied to entire blocks of text rather than selected text. You may want to use the Show Blocks option mentioned above to clearly see where formatting will be applied.*

 The **Bold, Italicize, Underline, Strikethrough, Subscript, and Superscript** formatting icons will function just as they would in any word processing software. You may also use keyboard shortcuts CTRL+B for bold, CTRL+I for italicize, and CTRL+U for underline. Mac users can substitute the CMD key for the CTRL key.

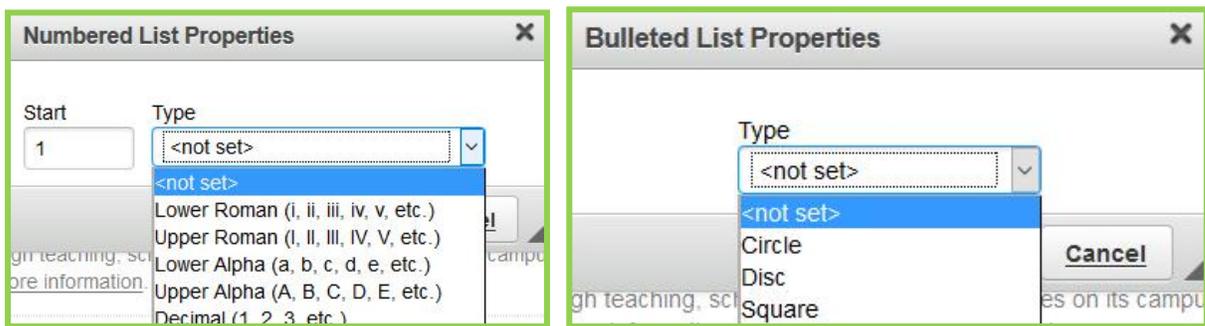


    The **Align Left**, **Center**, **Align Right**, and **Justify** buttons can be used to change the alignment of the text. Alignment will apply to entire blocks of text, not just to selected text.

  The **Numbered List** and **Bulleted List** icons can be used to create lists of content. These lists will be managed much as they would in any word processing software. You can start a new list by either selecting text first and clicking the icon, or by just clicking the icon. Either option will present you with the first entry in the list - either the first bullet, or first number.

Pressing enter at the end of the first line in the list will continue the list and pressing enter multiple times will decrease the list level and even take you completely out of the list.

Pressing tab or using the Increase Indent icon while in a list will increase the indent of the current list level. You may also change the type of numbered or bulleted list by right-clicking and choosing “Numbered List Properties” or “Bulleted List Properties.” Additionally, in a numbered list, you may set the starting value of the list.



**Note:** As a Best Practice, be sure that whenever you start a new list, you use the list icons in the toolbar. Entering a list manually is not recommended as it will be nearly impossible to ensure consistent formatting.

  The **Increase Indent** and **Decrease Indent** icons are used to adjust the indent level of list items as well as blocks of text. Indent will apply to entire blocks of text, not just selected text.

 The **Block Quote** icon can be used to set text off from the main text, to distinguish it visually.

 The **Insert Image** icon is used to add images to a page. An image must first be uploaded as a Media File in the Gateway & Content Module before you can insert it into a page.

**Note:** Only Manager level users can upload Media Files.

To insert an image, click the Insert Image icon and then use the “Select an image” drop-down menu to select the previously uploaded image. As a Best Practice, alternative text should be entered and should be a short sentence to describe the image.

You can adjust the width and height of the image, however, as a Best Practice we recommend resizing images outside of Acalog prior to uploading to maintain the best image quality.



You may enter a border, which will be displayed in the Preview to the right. “HSpace” and “VSpace” will control the amount of space that appears between the image and text in the page.

Alignment can be set to Left or Right and will allow text to wrap around the image. If no alignment is set here, it will use the alignment set in the editor and text will not wrap around it.

**Note:** Center is not an option for alignment. If you would like to align the image to the center of the page, you will need to use the center text alignment option after the image has been placed within the content.



The **Insert Horizontal Line** icon will add a horizontal line across the page. If your cursor is at the beginning of a paragraph, the line will be inserted above, but if your cursor is at the end of a paragraph, the line will be inserted below.



The **Insert Special Character** icon will open a dialog box with a selection of special characters that can be inserted into the page. The editor is Unicode compliant, so you may also use ALT Keystrokes to enter any special characters that you do not see in the special character selection, as well as copying and pasting them into the editor.

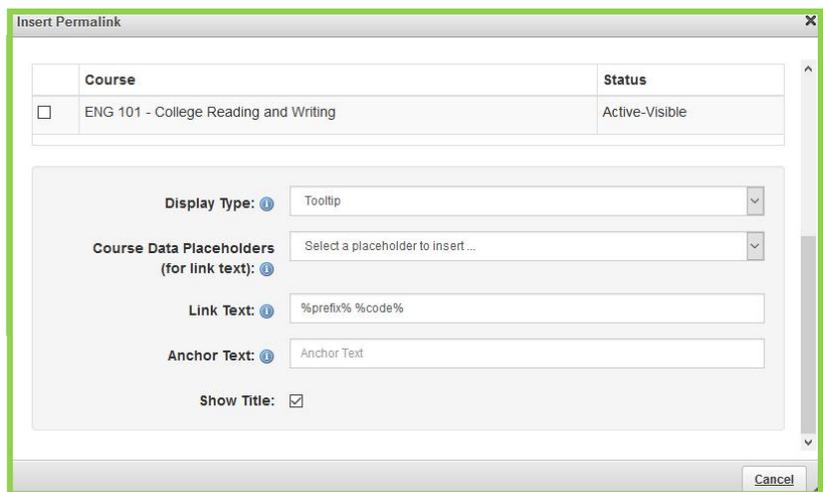


The **Insert/Edit PermaLink** icon is used to create a new PermaLink or edit an existing PermaLink. PermaLinks are used to link to content within the same catalog. Clicking this icon will open the PermaLink dialog box.

**Note:** Creating a large number of PermaLinks on a page will cause the page to load more slowly and may cause issues when editing and saving changes to the page. It is recommended that you minimize the number of PermaLinks per page, and do not exceed 100 PermaLinks per page.

By default, when you first create a new PermaLink, the “Search Category” will default to “Courses.” You may change this drop-down menu to also link to Custom Pages, Hierarchy Items, Programs, Filters, or Media Files.

After choosing the search category, enter the search parameters to locate the item you would like to link to and click “Search.”





Check the appropriate box next to the item you would like to link to and select the appropriate display settings.

The “Display Type” drop-down menu will let you determine how you would like the PermaLink to open.

As a Best Practice, we recommend setting course PermaLinks to use the default display type of “Tooltip.” Non-course PermaLinks will default to opening in “Same Window/Tab.” You can also set items to open in a new window, in a pop-up window, as a show/hide link, or inline.

You can also determine the “Link Text” that will display as the clickable link on the Gateway. Course PermaLinks will also have the option of using “Course Data Placeholders” to set the clickable link text. These data placeholders will pull the data directly from the Courses module to ensure that the links are always accurate and can automatically update themselves. For example, if you type in “ACCT 101” and the course later updates to “ACCT 105,” you would need to manually update each instance to reflect the change. If you use the data placeholder to instead reflect “%prefix% %code%” then the correct information will display regardless of how many revisions the course undergoes.

In the editor, PermaLinks will appear highlighted in green. You can edit the PermaLink by right-clicking or by selecting the link and clicking the button in the toolbar. Once a PermaLink to an item has been created, the item cannot be deleted without first removing the PermaLink. To remove a PermaLink, right-click and choose to “Unlink PermaLink” or “Remove PermaLink.” Unlinking will remove the link but leave plain text behind but removing the PermaLink will also delete the text.

**Note:** It is important to properly remove PermaLinks using the remove or unlink actions, and to avoid copying and pasting them to avoid introducing possible errors.



The **Maximize Editor** icon is a toggle that can be used to expand the WYSIWYG Editor to take up your full browser window. Clicking the icon again will minimize the editor to give you access to the rest of the page.



The **Help** icon will open a dialog box offering information on the features of the WYSIWYG Editor.

*Although not mentioned in the toolbar - one additional feature within the editor is the Exclude from Export tool.*



Exclude Text From Export

**Exclude from Export:** When you have content within your editor that you would like to leave out of your Catalog Export, you can mark it to be excluded within the editor to eliminate the need to manually remove it later. This feature does not have an icon in the toolbar and can only be accessed from a contextual menu.

To use it, right-click on highlighted text and select “Exclude text from Export” from the contextual menu and it will be marked with a red dotted line. Any text within the red dotted line will not be included in the document when you export this data from the Export module. To include it again, right-click and select “Include Text in Export.”

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If the data listed is in a table, or a bulleted/numbered list, be sure to exclude the entire list, rather than the list item.

**Note:** You do not need to exclude any images. By default, all media files will be excluded from the export as they are typically not print quality when used on the web.

Rev. [11/2020]



## Publisher Home Module

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When you first log into the Publisher, you will land on the *Publisher Home* page. The “Acalog” link in the upper-left corner or the Publisher Home Module will return you to this page at any time.

On this page, there will be a drop-down menu with a message indicating for you to start by selecting a catalog - this allows you to select which of the publications within this publisher you will be making edits within. The catalog selection can be changed at any time.

Next, you will be greeted by a welcome message that will indicate the type of account you have logged in with. You will also see a bolded message:

**Note:** *Please do not attempt to work in multiple catalogs simultaneously by opening multiple browser windows/tabs. If you do, you may experience display errors on some pages.*

Welcome to the Acalog ACMS™ Publisher, Mara

### Login Information

You are logged in with manager (system administrator) privileges. You have the highest level of access and control over the Acalog ACMS™. Please note: The Acalog ACMS™ is designed to allow you to manage data in one catalog at a time. **Please do not attempt to work in multiple catalogs simultaneously by opening multiple browser windows/tabs. If you do, you may experience display errors on some pages.**

[Hide login information.](#)

Below the welcome message you will see a link to Acalog University and Community.



## ACALOG UNIVERSITY AND COMMUNITY

This is a link to Acalog University. This site contains documentation, videos, FAQ's, training materials, and other resources in an online, easy to search format.

Our Acalog Forums have always been a great place for you to share information and solutions with other Acalog users. We're proud to introduce our new user forum, Acalog Community. With an all-new, modern interface and great new features, Acalog Community is hosted within Acalog University creating a single resource for the collective knowledge of Acalog's creators and users.

With the release of the this version of Acalog University and Community, there is no need for a second log in. Once you have logged into Acalog, you can click this link from your Publisher Home Module and you'll be taken straight to Acalog University.

## SUPPORT

If you cannot locate the answer to your question in this manual or on Acalog University, the Support widget is available in the lower left-hand corner should you need to get in contact with our Client Care team.



Our Client Care team works tirelessly to respond to inquiries as quickly as possible during our regular business hours of 8 AM to 5 PM Monday through Friday; but will also respond to emergencies after hours, on weekends, and on holidays as needed. To ensure the fastest possible response, please be sure to provide as much possible detail in your ticket to allow the team to research and provide a solution as efficiently as possible.

## Organizations Module

***This Module is specific to Enterprise Edition and will not be found in Standard Edition Publishers.***

This Module is used to manage the Organizations that are 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 if 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. Choosing to delete an Organization is a permanent option that cannot be reversed.

**Note:** Adding additional Organizations does not automatically create additional Gateways. The number of Gateways associated with your Publisher are determined by your contract; but you can contact us at [support@digarc.com](mailto:support@digarc.com) if this needs to be modified.

### CATALOGS ASSIGNMENT

Under the “Catalogs Assignment” tab, you can create aliases of Catalogs that were created at the System Level, so they may be used at the Organization Level. This allows for the System Level content to show within the Organization, yet not be edited outside of the System Level. The Organization can create and modify content within the Aliased catalog, but this new content will not impact the System Level. In this tab you will see a list of the Catalogs that have already been assigned and you will also be able to create new Catalog Aliases.

To create a new Alias, 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.

**Note:** Catalog Aliases must all have unique names.

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.

# User Accounts Module

Acalog allows you to create an unlimited number of users with different levels of access. The User Accounts Module allows a Manager to make changes existing accounts, create new accounts, and modify the permissions for each user account.

## MY ACCOUNT

In this tab, you will be able to see and modify your own account.

The “Account ID” field is where you set the username that is entered to log in.

You may also edit how your First Name and Last Name will appear in the Publisher. Your name will be displayed on the Summary for items you have modified or created and within Version Auditing (if enabled).

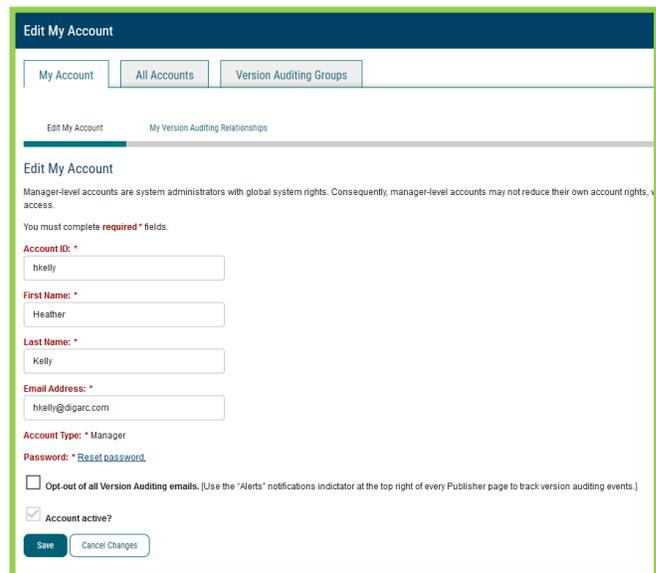
The email address associated with your account will be visible to other users, so they may contact you. This email address will also be used when the Publisher needs to send you a notification.

Your Account Type can only be adjusted by a Manager-level user in the All Accounts tab and will determine your level of access within the Publisher. Even though you may be a manager, you cannot change your own Account Type.

“Account active?” is grayed out because it can only be modified by a manager in the “All Accounts” tab. Like the Account type, even as a manager you cannot change your own account status.

You can change your password by clicking the “Reset password” link. This will open a pop-up window where you will be prompted to enter a new password. When entering a new password, note that it is case sensitive and will require a minimum of six characters.

**Note:** The Version Auditing Relationships tab shown in the screenshot may not be available if Version Auditing hasn’t been enabled in your Publisher; you can find more information in the [Version Auditing](#) section of this manual.





## ALL ACCOUNTS

This tab is the default page when you first navigate to the User Accounts Module if your account has manager level access. Here, users will see a list of all accounts within the Publisher.

A Manager-level user will also be able to select and modify any user account. All other users will only be able to view account information.

The screenshot shows the 'Manage User Accounts' interface. At the top, there are three tabs: 'My Account', 'All Accounts', and 'Version Auditing Groups'. Below the tabs is a search section with a 'Find a User Account' label, an 'Enter Keyword:' input field, and three radio buttons for search criteria: 'By Name' (selected), 'By Account ID', and 'By Email Address'. There is also a checkbox for 'Show only active accounts.' and a 'Search' button. To the right of the search section are two buttons: '+ New Account' and 'Export All Users To CSV'. Below the search section is a table with the following data:

Name	Account ID	Email Address	Account Type	Status	Last Logon
Casey Kilborn	ckilborn	ctedrow@digarc.com	Editor	Active	Never
Casey Tedrow	ctedrow	ctedrow@digarc.com	Manager	Active	09/23/2020 11:24:37

From this initial view, you can see the user's name, Account ID, Email Address, Account Type, Status, and the last time they logged into the Publisher.

This screen will list 10 users per page in alphabetical order, but you can also use the search to locate users faster. Searching by name looks for the user based on the name fields, Account ID looks for the user name, or you can search by their e-mail address. You can also export all of the user accounts into a CSV file to review - this file will display the same information shown on this screen.

## Create a New Account

Only a manager may create a new account. To begin, click "Add A New Account." You will need to enter the Account ID, which will act as the username that is entered to log into the Publisher. You must also enter First Name, Last Name, and Email Address for the user. The e-mail address must be formatted as a valid e-mail address - for example, email@domain.edu.

Next, select an Account Type from those available in the drop-down menu. There are three default Account Types: Manager, Editor, and Reviewer. You may also create a custom Account Type. For more information, see the [Account Types Module](#) section of this manual.

You will need to create a password for the user. The password that you enter will not be sent to the user, so you will need to let the user know what you set the password to, and instruct the user to change the password to one of their preference once they have logged in. If a user ever forgets a password, any manager will be able to reset the password for them. There is not an automated process within Acalog to reset the password.

Rev. [11/2020]

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Next, there is an optional checkbox to opt out of notification e-mails relating to Version Auditing. If you do not have Version Auditing enabled, this will not apply and may be ignored. This feature allows users to opt out of e-mail notifications that are sent by the system, and instead rely on the notifications built into Acalog. These features will be discussed in more detail in the sections covering [Version Auditing](#).

Lastly, you will need to determine if the account is active. If a user's account is marked as Inactive, the user will not be able to log into the Publisher. As a Best Practice, we recommend that you never delete an account because user names will be displayed in the Summary tab and Version Auditing history of items, but deleted accounts will display as "[user deleted]". Rather than deleting accounts, you can make them inactive.

If you create another Manager-level account, no permissions need to be set because a Manager's rights cannot be restricted. Editor and Reviewer accounts will need specific permissions assigned to them by a Manager. After creating the user's account, navigate to the "Permissions" tab.

Assigning permissions will differ based on the Account Type that was selected when creating the account. More information is available below under the [Permissions for Reviewers](#) and [Permissions for Editors](#).

**Note:** Enterprise users will need to assign an Organization prior to assigning catalogs and permissions. Standard Edition users can skip the following section on assigning Organizations to a user.

### Enterprise Edition Specific Feature: Assigning Organizations

Before catalog permissions can be determined in an Enterprise site, Organizations must be assigned. Manager level users may or may not have an Organization assigned. If no Organization is assigned, the user will be a Manager at the System Level. **Only Managers can edit content at the System Level.**

To assign an Organization, navigate to the Permissions tab of a user's account and choose from the drop-down menu under "Organization Access."

Multiple Organizations may be assigned to a user. Additionally, you can click the "Remove" link if a user will no longer be managing content within an Organization.

After assigning the Organization of an Editor or Review, you can follow the instructions below on how to assign catalog permissions. Once an Organization has been assigned to a Manager, the user will no longer have the ability to edit content at the System Level but will have full access to all content and settings in the chosen Organization.

**Please note:** Organization access can only be determined by a System Level Manager.

#### Organization Access

This account will have access to all organizations if no organizations are assigned.

**Select an Organization to Assign to this Account:**

Select an Organization ...

**Currently Assigned Organizations:**

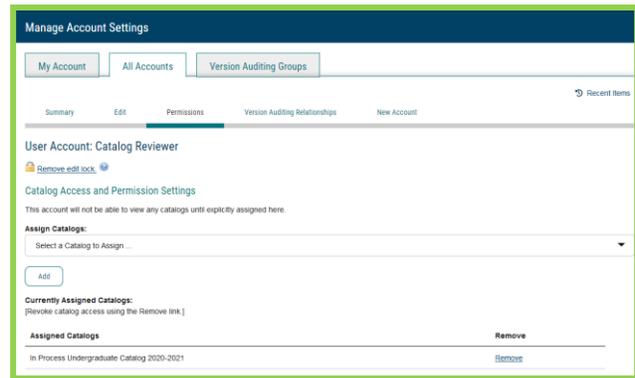
Organization	Remove
No organizations have been assigned to this account.	



## Permissions for Reviewers

Users who have been assigned Reviewer-level accounts have read-only access to the assigned catalogs. This means that if you grant them permission to view a catalog, they can view the entire catalog using the Catalog Preview, however they cannot make changes of any kind.

To choose which catalogs they can preview, From the available drop-down menu, select the catalog you would like your Reviewer to have access to. Once a catalog has been added, you will see it listed below the “Assign Catalogs” menu.

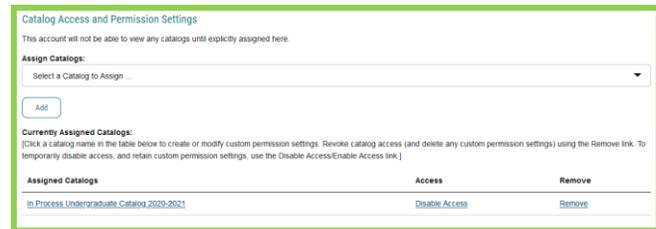


You can remove these catalogs at any time by clicking the “Remove” link to the right of the listed catalog.

**Note:** Some institutions provide a single reviewer account to be shared across several users to preview a catalog before publication date rather than creating several accounts. As this account type does not allow any type of edits, this is perfectly fine to do!

## Permissions for Editors

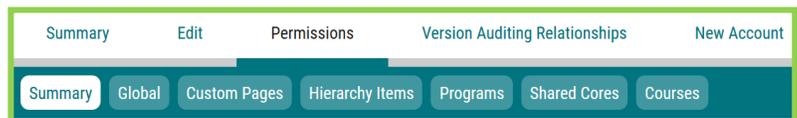
Users who have been assigned Editor-level accounts will be able to edit areas of catalog content within assigned catalogs. To assign editors permissions, navigate to the permissions tab and from the available drop-down menu, select the catalog you would like your editor to have access to. Once a catalog has been added, you will see it listed below the “Assigned Catalogs” menu.



You may “Disable Access” or “Remove” an assigned catalog. Disabling access means that all custom permissions within the catalog will be retained, but the user will temporarily be locked out of the catalog. If permission has been disabled, the link will say “Enable Access” to allow a user to once again access the catalog. Removing a catalog will delete all custom permissions that may have previously been established.

If you leave the custom permissions intact, you will be able to copy them from year to year when the catalog is copied. For more information, see the directions for creating a new catalog in the [Catalogs Module](#) section of this manual. To restrict access further, click on the name of the catalog you would like to restrict permissions within.

When you select the catalog in the Permissions Tab, you will see a series of buttons allowing you to assign permissions based on the type of catalog content Users will be editing. By default, you will be taken to the Summary button first.



Rev. [11/2020]

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The Summary button will display an overview of the permissions that have been assigned to the user. In the Catalog Permissions Summary table, you will see what access the user has, whether they have Global or Custom permissions, and if they have been granted Create or Delete Permissions. A green circle with a checkmark indicates the user has that permission and a red circle with an "X" indicates that user does not have that permission.

Catalog Permissions Summary								
Please note that the gray status icons in the summary table below mean that, even if custom permissions have been set, they are currently overridden by one or more settings above them. Empty gray icons indicate status not applicable.								
	Global	Custom	Pages	Hierarchy	Items	Programs	Shared Cores	Courses
Catalog Access								
Global Permissions								
Create Permissions								
Delete Permissions								
Custom Edit Permissions								

At the bottom of the Summary page you will see the Custom Permission Items table. This table will give you a quick overview of how many items have been assigned to the user in the other tabs.

These permissions are assigned in the corresponding tabs for Custom Pages, Hierarchy Items, Programs, Shared Cores, and Courses. Single items or group items may be assigned. A single item indicates a specific program or course whereas a group may indicate all courses with a specific prefix or owned by a certain department. To view a list of the assigned items, you can click the green links to be taken directly to the corresponding tab - or select the button from the top of the page.

Item Type	Permission Items
Custom Pages	<a href="#">2 Single Items</a> <a href="#">0 Group Items</a>
Hierarchy Items	<a href="#">1 Single Item</a> <a href="#">0 Group Items</a>
Programs	<a href="#">0 Single Items</a> <a href="#">1 Group Item</a>
Shared Cores	<a href="#">1 Single Item</a> <a href="#">0 Group Items</a>
Courses	<a href="#">0 Single Items</a> <a href="#">1 Group Item</a>

## Global Permissions Tab

The **Catalog Access** option allows you to easily revoke all of a user’s permissions while still retaining the permission settings for later use. This is a convenient way to prevent editors from making any more changes to a catalog that has reached a final state. If more changes are required later, the user’s permissions settings may be made active again.

	Global	Custom Pages	Hierarchy Items	Programs	Shared Cores	Courses
Catalog Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Disable					
Global Permissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Grant					
Create Permissions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Grant	Grant	Grant	Grant	Revoke
Delete Permissions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Grant	Grant	Grant	Grant	Grant

To revoke all permissions (but retain their settings), click the “Disable” button. To return all permissions as previously established before access was disabled, click the “Enable” button.

The **Global Permissions** option will allow a user the ability to modify all items an Editor-level account would have access to. Once a single custom permission has been established, global permissions will have an  indicating the user no longer has global permissions.

Clicking the “Grant” button will allow the user access to all items in the catalog, revoking any custom permissions that may have been previously established. If a user currently has global access, clicking the “Revoke” button will return any previously established custom permissions.

**Create Permissions** allow users to add new items to the catalog. By default, no create permissions will be granted. You can grant create permissions by area by clicking the “Grant” button. To disable create permissions, click the “Revoke” button for the appropriate type of item.

**Delete Permissions** allow users to delete items from the catalog. By default, no delete permissions will be granted.

**Note:** A user must have permission to edit an item in order to delete the item. This means that even if you grant Delete Permissions to a user under Programs, but they do not have permissions to edit any programs - they won’t be able to delete any either.



### Custom Pages Permissions Tab

The Custom Page Permission Items table will list any custom pages that have already been assigned to the user. You can click the “Remove” link to the right of an item to remove permission for just that item or you may check the box below the table to “Remove all permission items above at once.”

**Custom Page Permission Items**  
[Click an item name for details. Revoke group or single permission items using the Remove link.]

Item Type	Group	Item Name	Remove
Custom Page	Single Item	<a href="#">Academic Procedures</a>	<a href="#">Remove</a>
Custom Page	Single Item	<a href="#">Officers and Faculty</a>	<a href="#">Remove</a>

Remove all permission items above at once.

**Add Custom Page Permission Items**

Select One ...

To grant permission to a Custom Page, use the drop-down menu to select “All Custom Pages” or choose an individual page.

Choosing all will allow the user to edit all Custom Pages in the catalog as well as any Custom Pages that are added in the future.

To assign individual pages, you will need to choose them one by one and click the “Grant Permission” button. When selecting individual pages, the user will not be able to edit newly created pages - even if they are the user who created it - unless you edit their permissions and add the newly created item to the list.

### Hierarchy Items Permissions Tab

The Hierarchy Item Permission Items table will list any Hierarchy Items that have already been assigned to the user. You can click the “Remove” link to the right of an item to remove permission for just that item or you may check the box below the table to “Remove all permission items above at once.”

**Hierarchy Item Permission Items**  
[Click an item name for details. Revoke group or single permission items using the Remove link.]

Item Type	Group	Item Name	Remove
Hierarchy Item	Single Item	<a href="#">Liberal Studies</a>	<a href="#">Remove</a>

**Add Hierarchy Item Permission Items**

Select One ...

Grant group permission to the selected hierarchy item and all the hierarchy items therein.  
 Grant permission to the selected hierarchy item only.

To grant permission to a Hierarchy Item, use the drop-down menu to select the appropriate item. After selecting the item, choose the group or single item radio button and click the “Grant Permission” button.

If you choose a Department level hierarchy item, choosing group permission will have no effect because Departments do not own other Hierarchy Items. If you grant group permission to a School/College level item, the user will also have the ability to edit any Department within that School/College. If you choose the Institution when granting group permission, the user will be able to edit all Hierarchy Items.

**Note:** Assigning permissions to hierarchy items does not grant permissions to edit the programs and courses owned by that item - it only grants permission to edit the entity itself.





## Programs Permissions Tab

The Program Permission Items table will list any Programs that have already been assigned to the user. You can click the “Remove” link to the right of an item to remove permission for just that item or you may check the box below the table to “Remove all permission items above at once.”

Programs are assigned according to their hierarchy ownership. From the drop-down menu, select the appropriate hierarchy item.

Next, you will need to choose between the two radio buttons depending upon the need. “Grant group permission to programs in the selected hierarchy item” will grant permission to edit any program owned by the selected hierarchy item. If you later add additional programs within this same entity, the user will be able to edit these new programs as well.

“List programs in the selected hierarchy item to add individual program permission items.” will provide a list of all programs in the selected hierarchy item and you can check the box to the left of any programs you would like to assign to the user and then click “Grant Permission.”

When you choose to assign programs individually, the user will not be able to edit newly created programs - even if they are the user who created it - unless you edit their permissions and add the newly created item to the list.

Search Results	Parent
<input type="checkbox"/> Art B.A./B.S.	Department: Art
<input type="checkbox"/> Art Minor	Department: Art
<input type="checkbox"/> Arts and Sciences All-Level Teacher Certification	Department: Art
<input type="checkbox"/> Communication Arts B.F.A.	Department: Art
<input type="checkbox"/> Photography B.A./B.S.	Department: Art
<input type="checkbox"/> Photography Minor	Department: Art
<input type="checkbox"/> Photography Second Major	Department: Art
<input type="checkbox"/> Studio Art B.F.A.	Department: Art

[Grant Permission](#)

## Shared Cores Permissions Tab

The Shared Core Permission Items table will list any Shared Cores that have already been assigned to the user. You can click the “Remove” link to the right of an item to remove permission for just that item or you may check the box below the table to “Remove all permission items above at once.”

To grant permission to a Shared Core, use the drop-down menu to select “All Shared Cores” or choose an individual Shared Core.

Choosing “All Shared Cores” will allow the user to edit all Shared Cores in the catalog as well as any Shared Cores that are added in the future.

To assign individual Shared Cores, you will need to choose them one by one and click the “Grant Permission” button.



When you choose to assign Shared Cores individually, the user will not be able to edit newly created Shared Cores - even if they are the user who created it - unless you edit their permissions and add the newly created item to the list.

**Note:** Keep in mind that shared cores may appear in multiple programs and are not restricted by hierarchy ownership. Granting permission to edit a Shared Core that appears in programs across several different departments, might allow the user to effectively make changes in a program they would not otherwise have access to.

### Courses Permissions Tab

The Course Permission Items table will list any Courses that have already been assigned to the user. You can click the “Remove” link to the right of an item to remove permission for just that item or you may check the box below the table to “Remove all permission items above at once.”

Item Type	Group	Item Name	Remove
Course	Department	Art	Remove
Course	Department	History	Remove

Remove all permission items above at once.

**Add Course Permission Items**

Select a Group ... or Select a Course Prefix ...

Grant group permission to courses in the selected hierarchy item or course prefix.  
 List courses in the selected hierarchy item or course prefix to add individual course permission items.

Courses are assigned according to their hierarchy ownership or by prefix.

To assign course permissions based on their hierarchy ownership - use the “Select a Group” drop-down menu and select the hierarchy item that owns the courses you would like to assign.

To assign course permissions based on their prefix - use the “Select a Course Prefix” drop-down menu and select the prefix associated with the courses you would like to assign.

Next, you will need to choose between the two radio buttons depending upon the need. “Grant group permission to courses in the selected hierarchy item or course prefix.” will grant permission to edit any course owned by the selected hierarchy item or prefix. If you later add additional courses within this same entity or using the same prefix, the user will be able to edit these new courses as well.

Search Results	Parent
<input type="checkbox"/> ASTR 101 - Astronomy of Solar System	Department: Physics
<input type="checkbox"/> ASTR 102 - Introduction to Stars and the Universe	Department: Physics

“List courses in the selected hierarchy item or course prefix to add individual course permission items.” will provide a list of all courses in the selected hierarchy item or with the selected prefix and you can check the box to the left of any courses you would like to assign to the user and then click “Grant Permission.”

When you choose to assign courses individually, the user will not be able to edit newly created courses - even if they are the user who created it - unless you edit their permissions and add the newly created item to the list.

## Version Auditing Relationships

**Note:** Version Auditing must be enabled to use this feature. For more information on how to enable this feature, see the [Version Auditing](#) section of this manual.

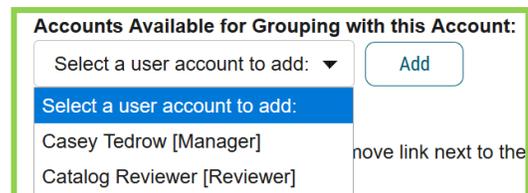
Version Auditing Relationships are used to establish default Event Auditors. An Event Auditor is the individual who has received an Audit Event Alert, which will prompt the user to offer feedback on changes to an item. An Event Auditor is not limited to any particular Account Type and can be any of the three defaults (Manager, Editor, or Reviewer) as well as any custom Account Type. If you have users who will be working closely together and/or reviewing each other’s work, Version Auditing Relationships will simplify the process of sending the Audit Event Alert.

To establish the relationship, navigate to the “Version Auditing Relationships” tab in the user’s account. If there is an existing Relationship established, it will be listed here. A user may have an unlimited number of Version Auditing Relationships.

Use the drop-down menu to choose from the available accounts.

**Note:** You will only see editor and reviewer accounts if they have access to the same catalog as the selected user.

Once added, the Event Auditor will automatically be preselected each time the user creates a new Audit Event Alert.



You can click “Remove” if a Version Auditing Relationship is no longer needed.

**Note:** Version Auditing Relationships work in both directions, which means that if User A has User B selected as a default event auditor based on a Version Auditing Relationship, then User B will also have User A selected as a default event auditor. Removing a relationship from one user’s account will also remove it from the other user’s account.

However, if User A is an editor and User B is a reviewer, then you will see User B listed on User A’s account as an Event Auditor - but you will not see User A listed on User B’s account. User B will not be able to edit any content in the catalog as a reviewer and will be unable to create any Audit Event Alerts - and therefore will not be able to have an Event Auditor.



## Edit & Delete User Accounts

As a Manager, you will have access to edit, inactivate, or delete the account of any user in the Publisher. Non-Manager users will only be able to edit their own account information, but they will not be able to change their own account type or active status.

**Note:** Managers will not be able to change their own account status or delete their own account.

To edit a user's account, click their name in the All Accounts tab and then click the Edit tab.

You will be able to edit all aspects of the user's account, including their Account ID, Name, Email Address, Account Type, Password, and active status. You can even delete a user's account.

**Note:** Deleting a user's account is a permanent action and is not recommended as a Best Practice because once deleted, any tracking that previously listed the user's name will not say "[user deleted]" instead. Rather than deleting a user's account, we suggest revoking permissions or making their account inactive to prevent them from logging in.

## Reset a User's Password

There will be times when users forget their passwords. Since there is not a way to retrieve a forgotten password, and no built-in reset - the solution is to have a manager manually change the password.

To change a user's password, edit the user's account, and then click on the Reset Password link. This will open a small pop-up window where you can change the user's password.

You must enter the new password twice - and it must contain a minimum of 6 characters (and keep in mind it is case-sensitive).

When you have finished changing the user's password, close the pop-up window. For security reasons, password information is never automatically emailed to users, so you will need to communicate to the user what the new password is. Once they have logged in with the new password, they will be able to reset it to one of their choosing.



## VERSION AUDITING GROUPS

**Note:** If you do not see the Version Auditing Groups tab, Version Auditing is not currently enabled in your Publisher. For more information, see the [Version Auditing](#) section of this manual.

Version Auditing Groups allow you to create a group of users so you can quickly send messages and alerts to all members of the group. Any user can be added to a Version Auditing Group, regardless of which catalogs they have been granted access to.

Groups can be searched by group name, user name, or email address. You may also quickly locate all groups you are a part of by checking “Only show groups for which I am a member.”

**Find a Group**

Enter Keyword:

By Group Name
  By User Name
  By Email Address

Show only active groups.

Only show groups for which I am a member.

[Search](#)

When viewing a list of groups, you will see the Group Name, number of members, active status, time and date of the last action taken, and a link to send an email to the entire group.

Clicking “Show Members” will display a tooltip listing the group members sorted by Account Type. To edit a group, click the group name.

Group Name	Members	Status	Last Action	Contact
<a href="#">Accounting Department</a>	3 ( <a href="#">Show Members</a> )	Active	08/10/2020 16:49:25	<a href="#">Email Group</a>
<b>Managers:</b> Heather Kelly Jay Wingo Mara Sansolo <a href="#">Close</a>				

### Create a Version Auditing Group

Only Manager-level users will be able to create and manage Version Auditing Groups, but all users will be able to view the groups that have been created.

When you click the link to add a new Version Auditing Group, you will be asked to give the group a name. After entering a name for your group, make sure that “Group Active?” is checked and click the “Add Users to this Group” button.

**Group Name:** \*  
 [Select a name for your group that will be easy to recognize for your workflow process.]

**Group Active?** [Uncheck to disable this group.]

[Add Users to this Group](#)
[Cancel](#)

**Note:** Groups cannot be deleted once they’ve been created and group names cannot be changed once the group has been used so you will want to be very careful when naming your group. Though you cannot delete a group, you will be able to make the group inactive if it should no longer be used.

Version Auditing Group: Accounting Department				
User Name	Email Address	Account Type	Status	Remove
<a href="#">Heather Kelly</a>	<a href="mailto:hkelly@digarc.com">hkelly@digarc.com</a>	Manager	Active	<a href="#">Remove</a>
<a href="#">Jay Wingo</a>	<a href="mailto:jwingo@digarc.com">jwingo@digarc.com</a>	Manager	Active	<a href="#">Remove</a>
<a href="#">Mara Sansolo</a>	<a href="mailto:msansolo@1digarc.com">msansolo@1digarc.com</a>	Manager	Active	<a href="#">Remove</a>



Once the group has been established, you will be able to begin adding users.

You may search by name or by email address to locate a user. Clicking search without entering a keyword will list all user accounts that currently exist in your Publisher.

When searching for users, you can check “Show only active accounts” - especially if there are a large number of users.

Once the group has been created - if it has not yet been used - you will be able to modify the name of the group.

**Add Users**

Find a User Account

Enter Keyword:

By Name  By Email Address

Show only active accounts.

**Group Name: \***

[Select a name for your group that will be easy to recognize for your workflow process. Once the group has been used, the name may not be changed.]

Once it has been used to send a Route Event Alert to the users, or to send them an e-mail, this option will become greyed out and unable to be changed.

You will be able to change the users in the group or remove them - even removing all of the users in the group - at any time. You may also choose to make the group inactive, but you will not be able to delete any group once it has been created.

## Account Types Module

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Account Types are assigned to specific user accounts to determine a user's access to the various modules. The primary distinguishing feature between Account Types and user permissions is that Account Types establish which **modules** are available to a user whereas the individual user's permissions establish what **items** a user has access to.

On the Manage Account Types page, you will see a list of existing Account Types. There are three default Account Types:

- **Manager** - System Administrators with global rights. Managers have access to all areas of the Publisher and their rights cannot be restricted in any way.
- **Editor** - Users who edit catalog content in assigned catalogs, but do not have administrative privileges in the Publisher. Editors will not be able to make changes that would have a global impact or that would alter the overall structure of a catalog.
- **Reviewer** - Users who have read-only rights to assigned catalogs. They will be able to interact with Version Auditing if enabled but will not ever edit catalog content.

**Note:** *The default Account Types cannot be altered or deleted, but if selected, the Summary link will list all modules granted to a user who has that type assigned.*

In addition to the default Account Types, you may create custom Account Types to create a unique fit for your users.

### CREATE OR EDIT A CUSTOM ACCOUNT TYPE

In some cases, the default permissions for an editor or reviewer account may not fit the needs of a given user. For example, you may want to be able to provide access for your admission advisors to view portfolio accounts that have been created - but not view or edit any catalog content. This would be a perfect example of when a custom account type would come in handy - you could create one with access to only the Portfolio Accounts Module.



To create a custom account type, click the “Add a new account type” link at the top of the Account Types page.

First, you will need to give your Account Type a name. The name doesn't need to be anything too descriptive but should be something you will recognize and remember when assigning the type to a user account - using the modules you are assigning may be a helpful naming convention, as an example. You will need to ensure that the name is unique - no two account types can have the same name.

Additionally, you have the option of entering a description for the Account Type. The Description may be used to indicate the intended use of the type, or the individuals it is designed for. The description will be seen on the Manage Account Types page.

Next, you can choose if you would like to start creating your custom Account Type by using the Editor or Reviewer Account Types as a base. Basing a custom type on Editor or Reviewer will allow the new Account Type to automatically have the same level of access granted by the selected type, and you can then assign *additional* modules the custom type should have access to.

For example, if you have a user who will act as an Editor but may have the additional responsibility of creating a print version of your catalog, you might create a “Super Editor” Account Type that would be based on Editor but include the additional Export module allowed as well. Conversely, you might have a user who only needs access to the Portfolio Accounts module, so you would choose to base the new Account Type on none.

Under “Assign Modules” you can decide which modules should be available to users with this Account Type.

In some cases, you may notice that a module is greyed out and cannot be chosen. For example, if you are creating an Account Type based on a Reviewer, you cannot add modules that would allow them to edit catalog content, such as Courses, Programs & Cores, or Gateway & Content. Once the Account Type has been created, you can begin assigning the type to users in the User Accounts module.

### New Account Type:

You must complete **required** \* fields.

**Account Type:** \*  
[This is a "name" for this account type.]

  
**Description:**  
[Add a description for your own use.]

**Assign Modules:** \*

[You must assign additional modules here to one of the three Based-on options in order to create a custom account type. Please note that the additional modules below are typically reserved for manager-level users and granting access to these modules will allow users of this account type full access to the module.]

<input type="checkbox"/> Catalog Preview	<input type="checkbox"/> Courses	<input type="checkbox"/> Export
<input type="checkbox"/> FlashPoint™ Links	<input type="checkbox"/> Gateway & Content	<input type="checkbox"/> Gateway Options
<input type="checkbox"/> Hierarchy	<input type="checkbox"/> Item Types	<input type="checkbox"/> PermaLink Usage
<input type="checkbox"/> Portfolio Accounts	<input type="checkbox"/> Portfolio Options	<input type="checkbox"/> Programs & Cores
<input type="checkbox"/> Remote Services	<input type="checkbox"/> Version Auditing	

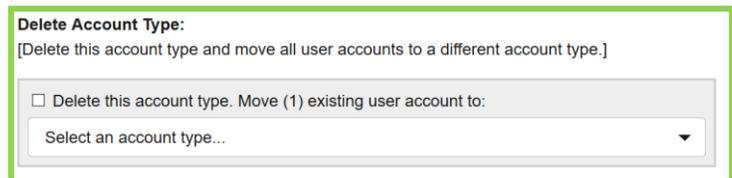
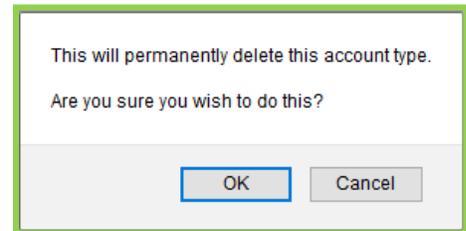
## DELETE AN ACCOUNT TYPE

You cannot delete any of the three default Account Types, but you may delete any custom Account Type at any time. To do so, you will first need to select the type you would like to delete and navigate to the Edit tab.

First, check the box to “Delete this account type.” A pop-up will appear, asking you to confirm that you would like to delete the account type and warn you that this is a permanent action. Click “OK” to confirm.

**Note:** Once you confirm the delete, the custom Account Type will be removed from the system permanently. This action cannot be reversed.

If the account type is in use by an existing user account, the number of users will be noted next to the delete option. You will need to move the user to another account type before you will be able to delete this one. A drop-down menu will be available listing all other Account Types and you can indicate which other account type should be assigned to the affected users.



# Catalogs Module

The Catalogs module is where you can create new catalogs and manage existing catalogs. Each catalog is an independent entity that will be edited individually which means that the structure and content may vary greatly between catalogs. This module has two tabs: Catalogs and Catalog Types.

## CATALOGS

In the Catalogs tab, you will see a table listing all existing catalogs in your Publisher. Catalogs that have been published - meaning they are visible on the Gateway - will appear at the top of the list and can be reordered; catalogs that have not been published will appear in alphabetical order below the published catalogs and cannot be reordered.

Catalog Name	Type	Preview
<a href="#">Undergraduate Catalog 2020-2021</a> [Published, Locked]	Undergraduate	<a href="#">Preview</a>
<a href="#">Graduate Catalog 2020-2021</a> [Published, Locked]	Graduate	<a href="#">Preview</a>

Within the table are three columns. The first column is Catalog Name. The catalog name provides a clickable link that will take you to the Summary tab for that catalog. To the right of the catalog name for some catalogs, there may be words in brackets to indicate the catalog’s status. There are five statuses that may be indicated this way:

- **Published** - Indicates that a catalog is visible from the Gateway. You will be limited to one catalog for each type.
- **Locked** - Indicates that only users who have manager-level accounts may edit this catalog. As a Best Practice, we suggest that you lock a catalog when publishing it to prevent editors from making changes to a live catalog.
- **Archived** - Indicates an older version of a catalog and places the archived catalog alert across the top of each page on the Gateway. For an archived catalog to show on the Gateway, it must also be published. When a catalog is archived, it lifts the restriction of one catalog per type.
- **Import Locked** - Indicates that a catalog is locked due to an ongoing import. During this import, a catalog may not be modified in any way, even by a catalog manager. When the import is completed, the import lock will be removed.
- **Copy Locked** - Indicates that a catalog is locked as a copy of it is currently in progress. During the copy process, the catalog cannot be modified in any way, even by a catalog manager. When the copy is completed, the copy lock will be removed.



### Enterprise Edition Specific Feature

Next to the “Catalog Name” column, you will see the “Aliases” column when viewing catalogs at the System Level. Clicking this link will open a tooltip listing the Catalog Alias and corresponding Organization. This column will not be seen at the Organization Level, but you will see a column indicating the “System Level Catalog” if the catalog is an alias; catalogs created at the Organization level will not have anything in this column.

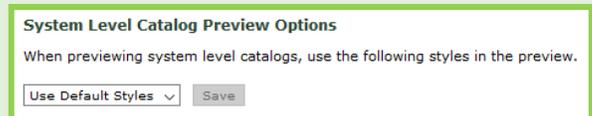
Further to the right is the “Type” column which will indicate which Catalog Type has been assigned to each of the Catalogs. This is important because there can only be one **current** catalog of a given type published at a time; however, you may have as many archived catalogs published as you would like. This means you may have a current Undergraduate and Graduate catalog for this year; but you may have archived Undergraduate and Graduate catalogs for the past five years displaying on the Gateway. The number of types you have available is determined by your contract and will be discussed further in [Catalog Types](#).

The last column on the right provides a link to launch the Publisher Preview of a selected catalog. This preview will let you see how the catalog will appear on the Gateway even when the catalog is unpublished.

**Note:** When reviewing the catalog through the Publisher Preview, there will be a few differences. The heading of the Gateway will not display, you will not be able to change catalogs using the drop-down menu, the portfolio feature will not be available.

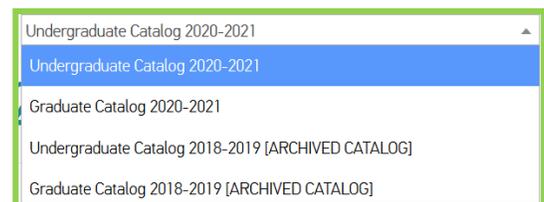
### Enterprise Edition Specific Feature

Publisher Previews are based on the styles of the Gateway. Because you may have multiple Gateways with varying displays with the Enterprise Edition, when you are using the preview option while viewing catalogs at the System Level, you will need to indicate which styles you would like to use in the preview. You can select “default” or any of your Organizations to see the preview using the styles of that Organization’s Gateway.



### Re-Order Published Catalogs

The way the catalogs in the Publisher are ordered will be directly reflected in the Catalog Select drop-down menu on the Gateway. Additionally, whichever catalog is at the top of the menu will be the default catalog seen by users when they first navigate to the Gateway.



Only published catalogs can be reordered. Unpublished catalogs will appear in alphabetical order below the published catalogs. There are several ways you can tell if a catalog can be reordered:

-  The circle icon to the left of the catalog has arrows pointing up and down to indicate movement options.
- The word “Published” appears in brackets to the right of the catalog name.



-  When you hover over the catalog, the row highlights and your cursor changes to four arrows pointing outward.

Moving catalogs is done using drag-and-drop functionality.

To do this, locate the catalog you would like to move and place your cursor on the move icon, or in one of the blank spaces either just to the front of the catalog name, or just behind it, then left-click and hold. The catalog you are moving will be highlighted until you release it. Next, drag the catalog to the desired location and release.

**Note:** Be sure to click the icon, or the blank spaces before or after the catalog name when reordering catalogs. Click on the catalog name itself may redirect you to the summary page for that catalog resulting in a loss of changes made to the ordering.

After you have reordered all items, click the “Save Ordering” button found at the top and bottom of the page. If you do not remember to save the ordering and you navigate away from the page, the changes to the ordering consideration will not take effect on the Gateway.

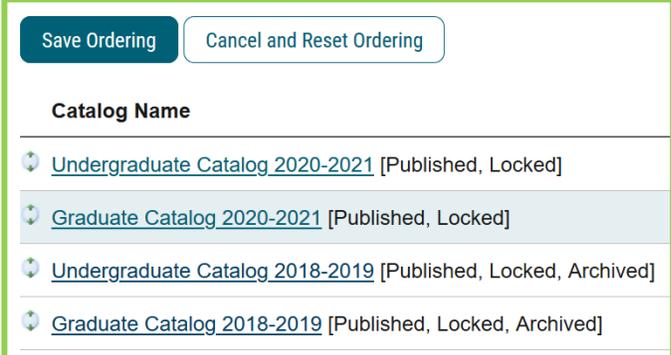
Additionally, you are not satisfied with the changes you’ve made, you can click “Cancel and Reset Ordering” to return to the ordering at the previous save. After saving, all changes will immediately be reflected on the Gateway.

## Create a New Catalog

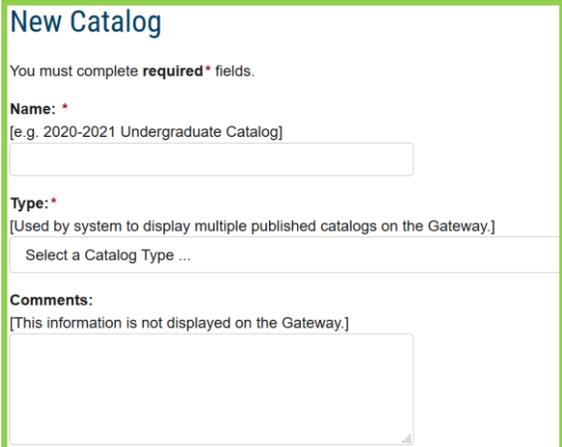
You will have the ability to create as many catalogs within the Publisher as you like; the only restriction will be on the number of published catalogs you may have of a certain type at a time.

When you are ready to create a new Catalog, start by selecting “Add a new catalog.” On the New Catalog page, the first step will be to give the catalog a name. This is a required field and will be the name that will appear on the Gateway when the catalog is published. You are welcome to name your catalog as you see fit, but many institutions prefer to use the publications year and type - for example, “2020-2021 Undergraduate Catalog.”

If this is to be a work in progress, you may also want to add “Working” or “In Progress” to the title until the editing cycle is complete, and then remove the additions to the title when you are ready to publish.



Save Ordering		Cancel and Reset Ordering	
<b>Catalog Name</b>			
	<a href="#">Undergraduate Catalog 2020-2021</a>	[Published, Locked]	
	<a href="#">Graduate Catalog 2020-2021</a>	[Published, Locked]	
	<a href="#">Undergraduate Catalog 2018-2019</a>	[Published, Locked, Archived]	
	<a href="#">Graduate Catalog 2018-2019</a>	[Published, Locked, Archived]	



**New Catalog**

You must complete **required\*** fields.

**Name: \***  
[e.g. 2020-2021 Undergraduate Catalog]

**Type: \***  
[Used by system to display multiple published catalogs on the Gateway.]  
Select a Catalog Type ...

**Comments:**  
[This information is not displayed on the Gateway.]



Next, choose a type from the drop-down menu. Catalog Types are determined as a part of your original contract - for many schools the default is two, but it may vary by the needs of each institution. Remember that you can only have a single, current version of each catalog type published at a time. If you need more catalog types, please our Client Care team, [support@digarc.com](mailto:support@digarc.com).

There is an optional comments field that can be used to further describe the contents of this catalog. Information entered here is for Publisher use only and will not be seen on the Gateway. This might be used to indicate why a particular catalog was created. For example, you might state that a catalog is for training or testing purposes only and should not be published.

When you are creating a new catalog, you will have two options: to choose from:

- **Create new (empty) catalog** - Choosing this option will create a new publication that is entirely blank. It will not contain any hierarchy, courses, programs, or static content, and will need to be built entirely from the ground up.
- **Create copy of existing catalog** - Choosing this option make an exact copy of a selected catalog. This is commonly selected when you are going to work on a catalog for the upcoming year, allowing you to make a copy of the current catalog so that you may make revisions. When a catalog is copied, all items are given new OIDs, and PermaLinks will be updated to point to the correct location within the new catalog, but the content will remain the same.

Create new (empty) catalog.

Create copy of existing catalog: [Copying catalogs can take as long as 30 minutes to process. After saving, your new catalog will be placed in a queue for processing, and you will receive an email notification when it is complete.]

Select a Catalog ...

Copy user permissions? [Retains custom user account permission settings from the catalog being copied.]

Copy attachments? [Copy all program and course attachments from the catalog being copied.]

When you select the “Create copy of existing catalog” radio button, you will be able to choose any catalog in the Publisher to be copied. When a copy begins, it may take up to 30 minutes to process. During this time, the catalog that is being copied will be locked and not be able to be edited by any user. When the copy is completed, the user who queued the copy will receive an e-mail to inform them the job has finished, and the lock will be lifted from the source catalog.

You can also choose whether to copy user permissions and/or attachments from the selected catalog; but the Version Auditing history - if you have Version Auditing enabled - will not be copied.

### **Enterprise Edition Specific Feature**

When working at the System Level in Enterprise, you will only be able to copy other System Level Catalogs. When working at the Organization Level, you will only be able to copy Organization Level Catalogs within the same Organization.



## Edit or Delete a Catalog

You can edit or delete a catalog at any point by navigating to the Catalogs Module and clicking on the catalog's name to be taken to the Summary, and then clicking on the Edit link.

In the Edit view, you can adjust the same fields that were available when you created the Catalog, such as Name, Type, and Comments. Additionally, you will find a series of checkboxes that allow you to adjust the Catalog's Status.

- **Published** - Indicates that a catalog is visible from the Gateway. You will be limited to one catalog for each type.
- **Locked** - Indicates that only users who have manager-level accounts may edit this catalog. As a Best Practice, we suggest that you lock a catalog when publishing it to prevent editors from making changes to a live catalog.
- **Archived** - Indicates an older version of a catalog and places the archived catalog alert across the top of each page on the Gateway. For an archived catalog to show on the Gateway, it must also be published. When a catalog is archived, it lifts the restriction of one type per catalog.
- **Block Search Indexing** - Will allow you to prevent most search engine web crawlers from indexing pages in this catalog. We recommend choosing this option when you Archive a catalog, so search results will point to the newest content rather than old catalogs.

**Published?** [You may have only one catalog published to the Gateway for each catalog type. Catalog type limitations are ignored for archived catalogs.]

**Locked?** [Prevents editing by editors.]

**Archived?** [Note: You may publish any number of archived catalogs. Published, archived catalogs will display in the catalog catalog dropdown menu and also the 'Archived catalogs' basic filter.]

**Block Search Indexing.** [Note: This will prevent most search engine web crawlers from indexing pages in your catalog.]

**Enable Degree Planner.** [If enabled links to a Degree Planner will be displayed on program pages.]

**Hide Program Descriptions.** [Hide all program descriptions to reduce printed Degree Planner length.]

**Hide Gateway Search.** [Entirely removes the search tool from the Gateway for this catalog only.]

**Delete This Catalog?** [This will delete everything contained in this catalog and cannot be reversed.]

**Note: This catalog is published and may not be deleted.**

**Note:** Keep in mind that when you enable the Block Search Indexing option, you won't see results instantaneously. Search engines crawl and store data on their own time - and we can't actually control the terms, they do it. If they have already stored information relating to your catalog, they may come up in search results for a few more weeks, but they won't continue to crawl this older data and eventually the newer catalogs will replace the older ones.

- **Enable Degree Planner** - Lets you decide if you would like this catalog to have the Print Degree Planner available on programs in the catalog. When enabled, the planner is automatically generated and always reflects all changes made to a program.
- **Enhanced Degree Planner** - Lets you decide which version of the Degree Planner you wish to display for this catalog. Note that the Widget API must be enabled to see this option.
- **Hide Program Descriptions** - Hides program descriptions in the Degree Planner to reduce size.
- **Delete this catalog** - Will open a prompt asking you to confirm that you want to delete the entire catalog; this is a permanent action and will delete all catalog contents. If you click "OK", the save button will

become a delete button. You will not be allowed to delete a catalog that has already been published; instead you will first need to un-publish the catalog and then edit again to choose the delete option.

**Note:** *Deleting a catalog is intended to be a permanent action and requires a three-step confirmation process before a catalog can be deleted from the Publisher. As an additional precaution, we also do not allow the deletion of published catalogs. We understand that everyone is human, and errors occur - and we do make nightly backups of our databases. If a catalog is deleted in error, it is possible for us to restore your publisher's entire database to the overnight backup, although this would mean that any and all changes made between when the restoration occurs and when the backup was taken would be reverted. This is a procedure we do **not** recommend unless it is absolutely necessary. Should you wish to proceed, please reach out to our Client Care team, [support@digarc.com](mailto:support@digarc.com). As a reminder, this should be considered an emergency action only.*

### **Enterprise Edition Specific Feature**

When you're ready to publish a catalog in Enterprise Edition, you will need to first publish the System Level catalog. Once the System Level catalog is published, any catalog aliases can be published within their respective Organizations. If you have created a catalog specific to an Organization, you can disregard this extra step.

## **CATALOG TYPES**

Catalog types offer a way to publish more than one current catalog at a given time to your Gateway. For instance, if you want to publish both undergraduate and graduate catalogs, you will need both "Undergraduate" and "Graduate" catalog types, and then to assign them to your catalogs as described above.

You can only have one published (non-archived) catalog of each type available on the Gateway at a time. The total number of catalog types available to you is determined by your contract - the default is two, but it may vary by institution. Some may have a single type, and some may choose to have a third type to include a handbook, for example.

You will be able to edit your existing types by navigating to the Catalog Types tab, and selecting the type of choice, and then click on the Edit Tab. From the Edit Tab, you will be able to change the type name or enter a description for internal purposes.

To publish additional catalogs, you will need to purchase additional catalog types. To do this, please contact our Client Care team, [support@digarc.com](mailto:support@digarc.com).

**Note:** *You do not have the ability to create or delete Catalog Types. If adjustment to your Catalog Types is needed, please contact our Client Care Team.*

# Catalog Preview

The Catalog Preview Module is the only module that will not be available to managers. This module is provided to editor and reviewer accounts by default and may be available within a custom account type if you have chosen to provide it.

Where managers have the Catalogs Module, other user types may use Catalog Preview. This module provides a way for users to preview catalogs that have not yet been published. In order to preview a catalog - the user will need to have the catalog assigned to them. Assigning a catalog to a user is covered above in the [User Accounts](#) section.

Catalog Name	Type	Preview
In Process Undergraduate Catalog 2020-2021	Undergraduate	<a href="#">Preview</a>

In the Catalog Preview module, users will see only list of assigned catalogs, the types associated with them, and a link to preview them. They will be unable to make any changes to the name, type, or status of them. Clicking the preview link will launch the Publisher Preview, allowing them to review these unpublished catalogs prior to them going live.

### **Enterprise Edition Specific Feature**

Users who are given access to catalogs at the System level will also have a column titled “Aliases”, which will open a tooltip window and display each aliased catalog associated; although they will not be able to modify them.

Users who are given access to catalogs within an Organization will have a column titled “System Level Catalog” which will indicate which System level catalog this was aliased down from; although they will not be able to modify it.

# Gateway Options Module

The Gateway Options Module is used to make changes that will impact your Gateway’s appearance. In this module you’ll be able to modify your FlashPoint Links, favorite icon, alerts, enable social media links, and customize the mobile application. You will need manager level access - or a custom account type with this module permitted - in order to access this module.

**Note:** All changes made in the Gateway Options Module are global, meaning they will impact your entire Gateway, regardless of which catalog you’ve selected in your Publisher. These options cannot be limited to a specific catalog.

### Enterprise Edition Specific Feature

Before you can make any changes in the Gateway Options Module, you will need to choose an Organization. Each Organization’s Gateway will be unique to that Organization.

There are no Gateway Options at the System Level because the System Level does not have a Gateway.

## SETTINGS

The settings found in this tab are broken into sections that are indicated by gray boxes. You will need to save your changes at the end of each of these sections as there is no master save button at the bottom of the page. Each time you save a section, the page will be refreshed and any unsaved changes on the page will be lost. Changes made within the settings are immediate and will impact your Gateway affecting all catalogs.

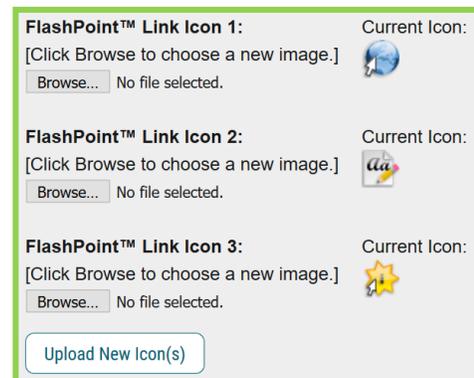
### Default FlashPoint Link Icons

FlashPoint Links allow you to place links or uploaded resources behind an icon rather than just behind clickable text.

When creating a new link, you can use one of three default icons or upload a custom icon. The default icons are helpful when you may need to use the same one repeatedly - for example, an icon to denote a PDF when placing a syllabus on multiple courses. By replacing a default, you can refer to the same image without needing to upload it each time you create a new FlashPoint Link.

You can change the default icons to your own custom icons here. The current icons will appear on the right in the same size they will appear on your Gateway.

These images should be no larger than 50x50 pixels and must have a “.gif”, “.jpg”, or “.png” file extension. To change them, click “Browse...” to locate an icon and then click “Upload New Icon(s).” After you’ve uploaded your new icon(s), the previews on the right will be updated. If you had any existing FlashPoint Links that were using these icons, they will be updated as well.



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## Favorite Icon

The "favorite icon" or "favicon" is displayed in some browser navigation, bookmarks, and tabs. It is not required, but a lot of websites - and institutions - use one as part of their branding. On the right is an example of browsers tabs displaying the favicon for Acalog and Gmail respectively.



You must upload an image of type ".ico" which will be renamed "favicon.ico" to conform with the standard. Once changed, you may need to empty your browser cache for the favorite icon to update. If you're not sure how to obtain that file type, or where to get your institutions favicon - you should check with your web administrator for more information.

On the right, you will see a preview of your current icon, if you have one set. To replace it, click the "Browse..." button to choose a file and then click "Upload New Favicon." The preview on the right will update to show your new favicon, however, you may need to clear your browser cache to see the change reflected when viewing your Gateway or any bookmarks in your toolbar.

## Meta Tags

Meta tags are an optional feature that are often used to improve placement in search engine rankings. They're not visible to your users but they are visible to search engines. There are two fields available for entering meta tags: description and keywords.

The description field allows up to 100 words describing the contents of your Gateway - you should use this field to describe what your catalog is about and what you are offering. The keywords field allows up to 100 comma separated keywords describing your Institution's catalog data - for these you want to try to enter the words you think visitors will enter into a search engine to find you.

When entering meta tags, keep in mind that the search engine will compare if what you've entered lines up with what it finds on you catalog: I have a website dedicated to why Jurassic Park was excellent but my tags all related to cats - search engines are not going to rank me very high!

## Alerts and Portfolio Email

The first alert in the section is the "Archived Catalog Alert," which is required. By default, "[ARCHIVED CATALOG]" will be the alert used. This alert appears the top of every page in an archived catalog and is meant to alert users that they may be viewing outdated content. Here you can customize this alert message. You can change this to display your preference - but keep in mind it will be the same across all catalogs, and no formatting is allowed. Some institutions have changed it to reflect "Outdated Content" while others have put "This Catalog is Out of Date and Should Not Be Referenced." Note that depending on the length of the Archived Catalog Alert, it may be cut off in the drop-down catalog selection menu.

The next two alerts are optional: "No Active Programs Alert" and "No Active Courses Alert." These alerts will appear when you create a filter that displays programs and/or courses based on Hierarchy ownership. If a particular Hierarchy item doesn't directly own any programs/courses, the alert you enter here will be used. These alerts are optional; if you leave these fields blank, no alert will appear.

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The “Portfolio Return Email Address” will be used if you have the Account-based Portfolio enabled. If a user creates a Portfolio account on the Gateway and forgets the password, they can request it be sent to them. When the password is automatically sent to the user, the email address you enter here will be the one the user sees.

After making any changes within this section, click the “Save Alerts and Portfolio Email Settings” button.

## Search Options

This section allows you some control over the search feature of the Gateway that appears above your navigation.

### Persistent Search Options

These settings control the search features that will appear at the top of your Gateway navigation. On the right is the current “Gateway search example,” which lets you preview how the search will appear on the Gateway.

**Persistent Search Options: \***  
[Select options to include in the search tool shown above the Gateway navigation. An example of the options chosen is shown at right.]

- Advanced search link only.
- Keyword field to search all catalog content.
- Keyword field and search location.
- Keyword field, search location, and Whole Word/Phrase checkbox.
  - Check Whole Word/Phrase by default.

**Search Location Names: \***

**Gateway search example:**

Catalog Search

Courses ▾

Enter Keyword

Whole Word/Phrase

[Advanced Search](#)

The first radio button will hide all search options except for the link to the Advanced Search page. The second radio button will add a keyword field. The third adds the search location drop-down menu. The last radio button adds the “Whole Word/Phrase” checkbox and allows you to decide if this box should be checked or unchecked by default.

### Search Location Names & Default

You can customize the terminology used for Hierarchy Items and Other Content in your search location drop-down menu. These fields are required if you chose to include the Search Location drop-down menu in the Persistent Search. Additionally, you can determine the default search location that will be selected if a user on the Gateway doesn’t choose to change it.

**Search Location Names: \***  
[The texts below appear in the search location drop down.]

Hierarchy Items:

Other Content:

**Search Location Default: \***  
[The default choice for the search dropdown.]

### Advanced Search Link Text

You can customize the clickable link text that will point to the Advanced Search page. This field is limited to no more than 25 characters.

**Advanced Search Link Text: \***  
[To avoid Gateway display errors, this text is limited to 25 characters.]



## Whole Word/Phrase Option

If you did not choose to include the “Whole Word/Phrase” checkbox in the Persistent Search Options above, you can choose here to make it available on the Advanced Search page. If you did include the checkbox in the Persistent Search, it will automatically be selected here and cannot be deselected.

## Search Results Shown Per Page

This number determines the number of search results that will be shown per page. The default is 5 and the maximum is 50. If a user searches the entire catalog, the results are broken into sections based on search location. If you set the results per page to a higher number, you may have a very long page of results to scroll through.

The example at the right shows search results for the “Courses - Keyword/Phrase Matches”. There are five results per page and a total of sixteen pages in this example.

A user will have to scroll past the course search results before viewing Programs, Hierarchy Items, or Other Content results.

Courses - Keyword/Phrase Matches
Results for any term in "math".
<a href="#">MATH 179 - Mathematics: Applications and Philosophy</a>
<a href="#">MATH 460 - Technology and Topics in Mathematics for Secondary Teachers</a>
<a href="#">MATH 331 - Discrete Mathematics</a>
<a href="#">MATH 361 - Mathematical Modeling of Science for Middle School I</a>
<a href="#">MATH 380 - Mathematics History</a>
Page: 1   2   3   4   5   6   7 ... Forward 6 -> 16

## Search Results Sorting

You can choose to have search results sorted alphabetically or by rank. The setting you choose here will be the default used for searches on the Gateway, but users will be able to switch between both sorting options.

Choosing the “By Rank” option will give users the most relevant search results and behaves in the way users are most familiar with.

## Other Settings

### List Archived Catalogs

This setting is a check box that is used to determine whether archived catalogs will appear in the catalog drop-down menu on the Gateway. If the box is checked, the catalogs will appear.

**Note:** Hiding archived catalogs from the drop-down menu does **not** unpublish them; published, archived catalogs will still appear in Archived Catalog filter pages or on the all catalogs page which is linked in the Gateway footer. This option is available to reduce the number of catalogs that may appear in the drop-down menu - if you have several publications per year or have been using Acalog to manage your catalogs for several years, you may have a large number of archived catalogs.



## Display Social Media Links

When this box is checked, a share icon  will appear next to the print-friendly icon on your Gateway pages. When hovering over the icon, a user on the Gateway will be able to choose to post a link to the current page to either Facebook or Twitter. The user will need to have pop-ups enabled and will need to be logged into their Facebook or Twitter account in the same browser.



**Note:** You cannot choose to only enable Facebook or Twitter; by turning on social media links, you will provide both options to your users.

## Gateway URL

This is informational only and will provide the current URL of your Gateway. If your Gateway URL needs to be adjusted, please contact Client Care, [support@digarc.com](mailto:support@digarc.com).

## Support Email

This email address will be used on the Gateway and in the Mobile Application (if enabled) to give users support contact information. It is required to have an email address entered here, but the “Support Email Link Text” is optional. This email address should point to someone at your institution who can answer questions a user may have about the catalog or about your institution. The “Support Email Link Text” can be changed to reflect the text of your choice, or even left blank.

## STYLES

**Note:** All styles set are put in place by our Gateway Integrations team, and if you need assistance managing the styles you can contact our Client Care team for assistance. For major changes, you do receive one free reintegration per year. Prior to making changes to this area, it is suggested that only individuals familiar with web development, (HTML and CSS) modify this content.

This tab allows you to modify some of the settings used in the Gateway's Cascading Style Sheet (CSS). The Gateway's CSS defines the look and feel of your Gateway and includes all the colors, fonts, spacing and even some images seen on the Gateway. The CSS used on the Gateway is put in place as part of the initial implementation and is handled by our Gateway Integration team - and is designed to mimic the look and feel of your institutional website and create a seamless integration. 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. Any changes that are made to the Gateway Styles will be immediate, shown in the Publisher's Catalog Preview module, and will affect all catalogs. Once a new style has been added, it will always be available, and unable to be deleted - even by a DIGARC team member.



## Add a New Style

Any custom styles that you add will be available in the “Styles” drop-down menu in the WYSIWYG Editor everywhere the editor is available.

To add a new style, click the “Add new style” link at the top of the style table. You must give each new style a unique name beginning with a letter. Be absolutely sure the style name is correct because you cannot rename or remove the style once it has been added. New styles will appear in the Gateway example and may be edited just like any existing style.

New styles will include all options except for the rollover color (which is reserved for links). Select how you would like the style to look, and then click the “Add” button to add the style.

Style Sheet Text Type	Font Names	Size	Color	Rollover Color	Bold	Underlined
<a href="#">+ Add New Style.</a>						

## Modify Gateway Styles

You can also modify some of the styles used in the Gateway’s Cascading Style Sheet (CSS).

- **Institution Name:** This is the name of your institution and will appear at the top left of all Gateway pages (just below the custom header).
- **Archived Catalog Alert:** This alert is only shown when an archived catalog is being viewed.
- **Current Date:** The date will be shown in the format, “MM DD, YYYY.”
- **Catalog Name:** The catalog name will only be displayed on the Gateway when a single catalog is published. If multiple catalogs are published simultaneously, then a catalog drop-down is displayed to allow users to select a catalog to browse. The catalog name will always be shown in the Publisher preview.
- **Catalog Search Header:** This is the Catalog Search text shown below the current date.
- **Gateway Navigation:** The Gateway navigation style applies only to links in the Gateway navigation. This includes the “Advanced Search” link and all links below it.
- **Heading 1:** The main heading is always shown on the top of every Gateway page to the left of the Help link. Main headings may also be used in Gateway custom pages.
- **Heading 2 - Heading 6:** The other headings are generally smaller and below the main heading. They may be used to display core names in a program and to display school/college or department names in some filter links.
- **Body Text:** Body text is any text shown in the main content area of any Gateway page, pop-up window, or in the help page.



- **Body Text Links:** This style applies only to links within the body text. These include all links in filter pages, course name links in programs, all links on the basic and advanced search pages, and the Print This Page link.
- **Table Headers (TH):** Table headers are displayed in catalog search results, in the portfolio, and potentially in other places of a catalog.

You can change the font, style, size, color, and attributes for each style described above. To change a style's font, select a font group from the Font Names drop-down. All styles require a font group. Select a font size from the Size drop-down.

Select a font color by clicking the color block. This will open a color picker that allows you to select a predefined color or enter the exact value of a color. The rollover color, which is only available for link styles, is selected the same way.

Finally, each style may be set to display in bold and link styles may be set to display underlined (*For Section 508 accessibility compliance, it is suggested links be underlined*).

When any change is made to any style, the Gateway example will be updated to reflect the change. This allows you to see what style changes will look like before saving them. When you are satisfied with your changes, click the Save button to save the style changes. You may also discard any changes that you made in the form (and example) by clicking the Reset button.

The screenshot displays a catalog search interface with a dark blue background. On the left, there is a search form with a dropdown menu for 'Courses', a text input for 'Enter Keyword', and a 'GO' button. Below the search form are several navigation buttons: 'Catalog Home', 'Academic Calendar', 'Course Descriptions', 'The School/College of Arts & Sciences', and 'Campus Life'. The main content area on the right shows various text styles: 'Page Title' (large, light blue), 'Heading 1' through 'Heading 6' (in decreasing sizes), and a paragraph of 'Body Text' containing a link and a custom style. The interface also includes a 'Catalog Name' field, an 'ARCHIVED CATALOG ALERT' message, and a 'HELP' link.

## HEADER

**Note:** The headings are put in place by our Gateway Integrations team, and if you need assistance managing the headings you can contact our Client Care team for assistance. For major changes, you do receive on free re-integration per year. Prior to making changes to this area, it is suggested that only individuals familiar with web development, (HTML and CSS) modify this content.

As part of your initial implementation, our Gateway Integrations team will design a custom header to create a seamless integration with your institutional website. If you are familiar with HTML and CSS, you can have your own customizable header that will appear at the top of every Gateway page on every catalog. The header might include your institution's logo, links to your main institution website or other locations. You can have an unlimited number of Gateway headers and header images - but only one Gateway header can be active at a time. The Header tab includes tools to manage the Gateway header and any images used in the Gateway header.

### Set the Active Gateway Header

To set the active Gateway header, simply click the radio button next to the Gateway header you want to make active, and then click the "Make Active" button.

If "None" is chosen, no header will be shown across the top of the Gateway. The active Gateway header will immediately be shown on all Gateway pages.

### Create a New Gateway Header

To create a new Gateway header, click the Add a new header link and fill in the form on the following page.

**Gateway Header Name:** This is the name of the Gateway header. This is used only for reference and will not be displayed anywhere on the Gateway. This is a required field.

**Gateway Header:** This is the Gateway header itself. Use the WYSIWYG editor to create a custom header. To add images, use the insert picture tool and choose an image from the drop down. This will display a list of uploaded images (uploading header images is described below). You may also enter a custom URL to an image located on a web server. This is a required field.

When finished, click the Save button to save the Gateway header. Click Cancel Changes to discard any changes that you made to the header.

**Note:** When creating or editing a Gateway header, the WYSIWYG editor includes a Source option to edit the Gateway header source code directly. Only users who understand HTML should edit the source code. This source code option is not available anywhere else within the Publisher.

### Create a New Remote Header

To create a new remote header, click the "add a new remote header" link and fill in the form on the following page.

**Gateway Header Name:** This is the name of the remote header. This is used only for reference and will not be displayed anywhere on the Gateway. This is a required field.

Rev. [11/2020]

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**Gateway Header URL:** This is the URL of a header file hosted on a remote server, such as your institutional website. The URL entered must begin with either "http://" or "https://". This is a required field.

When finished, click the "Save" button to save the remote header.

### Preview a Gateway Header

To preview a header, click the "Preview" link for the header. A pop-up window will appear displaying only the header selected.

### Edit a Gateway Header

To edit an existing Gateway header, click the name of the header you want to edit. Editing a Gateway header is very similar to creating a Gateway header.

You can change any of the information for the Gateway header as desired in the same way that you would create a new custom header as above. Click the "Save" button to save your changes or click "Cancel Changes" to cancel changes to the Gateway header.

### Delete a Gateway Header

To delete a Gateway header, simply click the Delete link. A pop-up box will require you to confirm that you want to delete the Gateway header. If you confirm this, you will now have to click the "Delete!" button to permanently remove the Gateway header. Once deleted, a Gateway header cannot be undeleted. This is a permanent action that cannot be undone.

**Note:** *If you delete the active Gateway header, no custom header will be shown on the Gateway (this is equivalent to selecting "None" as the current Gateway header).*

### Copy a Gateway Header

To make a copy of a header, simply view the list of headers and click the "Make Copy" link for a header. A copy of the header will immediately be created with "(2)" after the name. If a copy with that name already exists, "(3)," "(4)," etc. will be added instead.

### Upload Header Images

To upload an image for use with the Gateway header, click "Browse ..." to locate the file on your local or networked hard drive, and click the "Upload Image" button. Only images of file type GIF, JPG, or PNG may be uploaded and used in headers.

### Check Header Image Usage

To check in which headers an image is used, simply click the "Usage" link for the image.

### Preview Header Images

To preview a header image, simply click the "Preview" link for the header image. In addition, you may check which headers use a particular image by clicking on the link in the "Usage" column.



## Delete Header Images

To delete a header image, simply click the “Delete” link. A pop-up alert may explain which headers may be affected by removing the image and you will be required to confirm that you want to delete the header image. Once deleted, a header image cannot be undeleted.

**Note:** *If you delete a header image that is being used in any custom header, a message explaining which Gateway header(s) had used the image will be shown.*

## MOBILE APPLICATION

**Acalog gateways are now fully responsive, meaning that the content of the page will automatically adjust based on the size of the screen used to view the site. This change means it is no longer necessary to configure the Mobile Application unless you do not want your gateway to be responsive. Information on how to configure the Mobile Application is below.**

If you are utilizing the Mobile Application, and you wish to switch your gateway to be responsive, please submit a support ticket via the Support widget on the page.

*The Mobile Application provides a mobile experience for browsing your catalog. You can manage numerous settings to customize the functionality of the mobile application and its general appearance. The mobile application uses HTML5 or display your catalog as a mobile friendly website that is compatible across devices. Users do not need to download anything to access your mobile site.*

## Application Settings

*The application settings page allows you to manage several general settings for how the mobile application acts. It also allows you to manage contact information that will be displayed in the mobile application. The page is broken down into several sections.*

### Application Settings

**Enable/Disable Application:** *You may choose to enable or disable the mobile application itself. This is a required field, but it may be changed at any time.*

**Automatically Forward Mobile Users:** *Choose this option to automatically forward mobile device users to the mobile application when they view the Gateway. All other devices will default to the standard Gateway.*

**Allow Mobile/Gateway Switching:** *If checked, users may switch between the mobile application and the standard Gateway. If you’ve chosen to automatically forward mobile users, as a Best Practice, we suggest allowing the user to switch between the mobile and full-site version.*

**Application URL:** *The URL to the mobile version of the e-catalog. You will not be able to change this URL within the publisher, but if you would like to have it changed please contact our Customer Care Team.*

**Application Title:** *The Application Title will also be used when users choose “Add to Home Screen” on iOS devices. The title may be abbreviated when shown on the device, to avoid this we recommend that the title be no more than 12 characters in length.*

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**Support Email:** The support email used in the mobile application is the same e-mail information that is used on the Gateway Settings tab. To modify this setting, you will need to return to Gateway Settings.

**Contact Email:** This email address will be displayed on the Contact Institution page in the mobile application, alongside the optional phone number and physical address. It may differ from the support e-mail address.

Be sure to click the “Save button” to save these settings.

### Application Icon

The application icon will be shown on the contact information page, or if your users choose the “Add to home screen” option on their devices. Click the “Browse ...” button to select an image from your local or networked hard drive. Mobile icons must be a PNG image that is 114 x 114 pixels. If you upload an image that does not fit this criterion, it will automatically have resized to fit these dimensions. Once it has been uploaded, the preview to the right will update to display your new icon.

Choose the “Apply Gloss” checkbox if you want the icon to be made glossy when displayed. This will only be seen on mobile devices.

Click the “Upload Icon” button to save the gloss setting or to upload a newly selected mobile icon.

### Application Loading Screen

The loading screen will be shown while the mobile application loads on a mobile device if you were on a slower connection; and it will only display for users with an Apple device. Click the “Browse ...” button to select an image to upload. The loading screen image must be 320x460 pixels and in PNG format. If you upload an image that does not meet this criterion, it will be automatically resized to fit these dimensions.

Click the “Upload Loading Screen” button to upload a newly selected loading screen. Once it has been uploaded, the preview to the right will reflect the new image.

### Application Banner

You may have a banner shown across the top of the mobile application. This may be a block of color, an image that tiles, or an image that stretches across the top of the application. If the banner is not shown, a bit more space will be available for your catalog information. At the right is displayed an example of what the banner will look like.

**Enable Banner:** If checked, the banner will be displayed at the top of the mobile application.

**Banner Image:** Select an image to use as the banner. The image should be a PNG of 320x30 pixels in size. Larger or smaller images will be automatically resized to that size. You may preview the current image by clicking the Preview Current Image link.

**Use Background Image:** Select a background image to display behind the banner image. The background image should be a PNG of 30 pixels in height. The background image will be tiled horizontally if needed. You may preview the current image by clicking the Preview Current Image link.



**Background Color:** A solid background color may be used if a background image is not needed or desired. Click the color block to change the background color used. There are three tabs available for choosing your color: RGB, Named colors, and Color slider. In the Color slider tab you will be able to adjust the color using slider tools, or you can enter the hexadecimal value of a color if you know it.



When you click the “Upload Images and Save Changes” button, any images selected will be uploaded and the other settings will be saved.

### Address Information

All addresses entered here will be shown in the contact information page of the mobile application. Multiple addresses might be used when your institution has several campuses.

Click the “Add a new address” link to add a new address. When adding an address, you will be required to give the address a “Label.” If multiple addresses are listed, this will appear in a list for the user to choose from. It will also appear at the top of the contact page for the address in the mobile application. When you enter an address, you will see a preview on the right of the map that will be displayed for users. You can also add a phone number for each location. Lastly, click the “Save” button to save your changes.

You may add an unlimited number of different addresses. If multiple addresses have been entered, you may easily reorder them using drag and drop. Click the Save Ordering button when finished to save the new ordering.

To edit an existing address, click the “Edit” link next to the address. To delete an existing address, click the “Delete” link next to the address. You will be required to confirm that you wish to delete the address. This operation cannot be undone.

### Styles

This page allows you to modify the style sheet used on the mobile application. On the right is the “Mobile Application Example” which will let you preview how your mobile application will appear, including the banner you set in the “Application Settings” tab. On the left you will find a table listing the various elements of the application, which you can change the color of. You cannot change font size/style or layout of the application. The elements are as follows:

- **Loading Spinner:** The loading spinner is used to indicate when mobile application pages are loading. You may choose a color of black or white.
- **Toolbar (Background and Text):** This element is the top section of the mobile application. It typically shows the catalog name. You may choose the color of the background gradient and the text.
- **Button (Background and Text):** This element affects the buttons at the top left and top right of the mobile application. You may choose the color of the background images and the text. Info Box (Background and Text): This section will include instructions for the user or the “[ARCHIVED CATALOG]” alert. You may choose the background and text color.



- **Content Background:** This element is the background shown behind the body text and link text.
- **Application Background:** This element is the pinstripe background shown behind the mobile application's content.
- **Header:** The header text will be shown in several places at several sizes. You may choose the text color used for all headers.
- **Body, Link Text:** You may choose the color of both the standard body text and link text.
- **List Separator (Background and Text):** The separator is used to define groups of data such as breaking up an alphabetical listing by letter.
- **List Item (Background and Text):** List items are clickable links used to browse the catalog's information. You may choose the background and text color.
- **List Item (Selected) (Background and Text):** Selected list items are list items that have been rolled over. You may choose the background and text color.
- **List Item (Details):** Occasionally additional details will be shown within a list item in this style you may choose this text's color.
- **List - Chevron:** The chevron element is the ">" image used in list items. You may choose the color of the chevron.
- **Secondary Button (Background and Text):** This element will be seen on the search page in the mobile application. You may adjust the background and text color.

When a change is made to any style, the mobile application example will be updated to reflect the change. This allows you to see what the style changes will look like before saving them.

To save the styles, click the "Save" button. All changes made will be live and immediate.

# Gateway & Content Module

This module allows you to customize the appearance of your Gateway navigation for a selected catalog as well access to edit the contents of the pages found within the navigation. The Gateway & Content Module includes the Navigation, Filters, External Links, Custom Pages, and Media Files Tabs.

When you first navigate to this module, you will see the Navigation tab.

**Note:** If you access this module with manager level access, you will see five tabs across the top of the page. If you access this module with any other account type, you will only have access to Custom Pages.

If Custom Permissions are enabled, non-manager level users may have even fewer permissions and they will be designated by two icons:

 - Indicates permission to edit the selected item has been granted.

 - Indicates permission to edit the item has been revoked. The Edit Tab will not be available.

## NAVIGATION

The Gateway navigation is unique to each catalog and may include any of the following items:

- **Filters** - templates generated based on your selections to dynamically display catalog data such as a list of courses or programs.
- **External Links** - links placed in the navigation that direct the user to a location outside of your catalog content, such as your institutional website.
- **Custom Pages** - narrative content such as a message from the president, academic policies, or a list of staff and faculty. Typically, the content found in the front for very back of a traditional printed catalog.
- **Media Files** - files such as PDFs, images, or videos you would like to make available to users on the Gateway.



Navigation Link Label	Type	Remove
<a href="#">Catalog Home [Preview]</a>	[System Default]	
<a href="#">Horizontal Rule</a>	Display Item	<a href="#">Delete</a>
<a href="#">University Calendar [Preview]</a>	Custom Page	<a href="#">Make Inactive</a>
<a href="#">General Information [Preview]</a>	Custom Page	<a href="#">Make Inactive</a>

From the Navigation Tab you will see a brief description followed by links to add new items to your navigation; this is offered as an optional shortcut in addition to navigating to the corresponding tab at the top of the page for the type of item you would like to add.

Below the add links, you will see the current Navigation displayed within a table. The first column lists the "Navigation Link Label" which reflects the clickable link text that will appear in the Gateway Navigation. Each of

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these is a clickable link that will take you to the summary tab for that item, where you can review additional details or modify the items. To the right of each item's Navigation Link Label, you will see a "Preview" link for each item which will launch the Publisher Preview.

### Enterprise Edition Specific Feature

When viewing the Navigation, you'll find that each item has an additional icon appearing next to it. Hovering over the icon will provide a tooltip identifying its purpose.

 - Indicates that content is housed at the System Level and cannot be modified within an Organization but may appear within several aliased catalogs.

 - Indicates that content is housed within an Organization. The content is not shared across multiple catalogs and may be edited at this level.

The "Type" column will indicate if the item is a Filter, External Link, Custom Page, Media File, or Display Item. This information can help you determine at a glance the type of content that may be displaying, as well as how it may be modified.

**Note:** *Catalog Home is listed as a [System Default] under Type. This item is a Custom Page that will always be listed as the first item within your Navigation. It is not able to be removed.*

### Enterprise Edition Specific Feature

When editing a Catalog at the System Level, you will not see the usual "Catalog Home" default page. You may reorder items at the System Level, but each Organization will have the ability to override the ordering you indicate at the System Level.

When editing the Catalog navigation at the Organization Level, you will see the "Catalog Home" default page, which will be unique to this Organization. You may adjust the active status of items and reorder the navigation within the Organization, overriding the order that was saved at the System Level. You will also be able to add display items normally.

The "Remove" column allows you to remove items from the Navigation. The option for these items will be "Make Inactive", not delete. Making items inactive will hide them from view on the Gateway and remove them from the Navigation. If you would like to fully delete an item that appears in the Navigation, you will need to navigate to and edit that item directly.

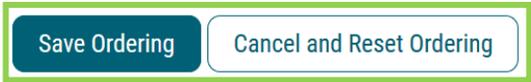
The exception to this will be Display Items. Display items, such as a blank line or horizontal rule, are elements placed in the Navigation for the purpose of organizing the list and do not display any actual content. These items will provide a "Delete" option and allow you to delete them from the Navigation.



## Re-Ordering Navigation Items

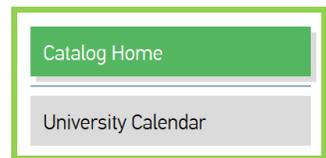
The order of the items in this Navigation is the same order that will be used on the Gateway. The “Catalog Home” default will always appear at the very top of the Navigation; as the System Default it cannot be moved or deleted. All other items in the Navigation can be re-ordered using a simple drag-and-drop method.

To change the order of the Navigation, hover over an item, and the entire row will be highlighted, and your cursor will change (↕) to indicate that the item can be moved. Be sure to hover over the icon (🔄) to the left of the item name or to the right of the preview link - clicking on the name of the item or on the preview link will take you to the summary or launch the Publisher Preview rather than begin the reordering function. Left-click and hold to drag the item, then release the left-click to drop the item in place. After making all ordering changes, click the “Save Ordering” button at the top or bottom of the page. Additionally, you can click the “Cancel and Reset Ordering” button to return the Navigation to the previous save.



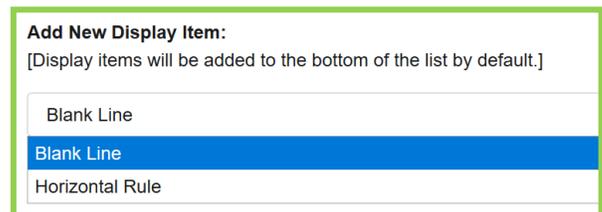
## Display Items

At the bottom of the page, there is a drop-down menu that can be used to add display items to the Navigation. A blank line or horizontal rule may be selected. These display items are meant to help organize the Navigation when seen on the Gateway.



The example at the right shows how the Navigation will appear on the Gateway with a horizontal rule appearing below “Catalog Home”.

To add a display item, choose the option you’d like to insert from the drop-down menu and click “Add.” You can only add a single item at a time, so you may need to do this several times if you want to add multiple items. By default, new display items will always be added to the bottom of the navigation. Once added, you can re-order the display items using the drag-and-drop method described above.



## Adding New Items

Items are added to the Navigation when the content elements - Custom Pages, Filters, External Links, or Media Files - are created and set with a status of “Active-Visible.” To add new items to the Navigation, you will either need to modify an existing item’s status to reflect this or create a new one with this selection.



## FILTERS

Filters are used to dynamically display information from the Catalog. They allow you to establish a template by selecting a set of options so that the Publisher can gather a list of links that organize your catalog's data into manageable pages of consistent information. You can design them to display as much, or as little, filtered data from the catalog as you want.

Filters are typically used to display Courses or Programs information, but they can also include Hierarchy information, or be used to display Archived Catalogs or even Search Results!

When you navigate to the Filters tab, you will find the “Add a new Filter” link, a search, and a list of all existing Filters currently within the Publisher.

In the table listing the Filters, you will find three columns. The first column will be “Filter Name.” This will list the “Navigation Link Label” - what will appear in the Navigation on the Gateway and will serve as the clickable link text for the user.

The second column is the status. Filters may be one of three options:

- **Active-Visible** - The Filter will display in the Navigation and be visible on the Gateway. You may create PermaLinks to this Filter.
- **Active-Hidden** - The Filter will **not** display in the Navigation, but you can still create PermaLinks to it.
- **Inactive-Hidden** - The filter will not be visible on the Gateway at all. PermaLinks to this Filter will be disabled.

The third column is the “Preview” option. Each Filter will have a preview link, which will launch the Publisher Preview allowing you to review how the Filter will appear on the Gateway.

Filter Name	Status	Preview
<a href="#">Art department course for Print</a>	Active-Hidden	<a href="#">Preview</a>
<a href="#">Biology Planning Sheet</a>	Inactive-Hidden	<a href="#">Preview</a>

### Enterprise Edition Specific Feature

When viewing the list of Filters, you'll find that they have additional icon appearing next to it. Hovering over the icon will provide a tooltip identifying its purpose.



- Indicates that content is housed at the System Level and cannot be modified within an Organization but may appear within several aliased catalogs.



- Indicates that content is housed within an Organization. The content is not shared across multiple catalogs and may be edited at this level.



When viewing a list of Filters from an Organization, you'll also find that instead of a "Status" column you will have "SL Status" and "OL Status." The "SL Status" column shows the system level status of the item and the "OL Status" column shows the organization level status of the item. The "OL Status" will affect the item's ability to be viewed on the Gateway while the "SL Status" is informational only. Any of these items created at the organization level will not have a system-level status.

## Creating a New Filter

To create a new Filter, start by clicking on the link, "Add A New Filter." As you begin filling in this form to establish your Filter, note that any fields with a red asterisk are required fields, and any fields without the asterisk are optional.

The first field will be the **Navigation Link Label**. The text that you place here will serve as the name of the Filter and what will display in the Navigation as the clickable link text. This field allows a maximum of 200 characters and does not allow any type of formatting to be entered.

The **Page Header** text would appear as the title of the page *if* you would like the page title to differ from the text that appears in the Navigation. For example, you could have "Programs of Study" display in the Navigation and "2020-2021 Undergraduate Programs of Study" display as the Page Header. If you would like the Page Header to display the same text as the Navigation Link Label, you can leave this field blank and it will populate the information for you. This field allows a maximum of 255 characters and does not allow any type of formatting to be entered.

The **Page Description** field provides a WYSIWYG editor where you can enter an unlimited amount of text and formatting using the toolbar provided. The information provided in this field will display above the filtered content. The Page Description is an optional field.

The next section, **Choose Filter**, determines the type of Filter that you want to use. You can create three different types of filters:

- **Basic** - displays one level of information from the catalog, such as all departments or courses.
- **Complex** - displays two levels of information from the catalog: hierarchy information and either program or course information.
- **Direct** - displays information for one school/college, department, or program.

Once you have selected a Filter, a new section will appear titled "Filter Options." The Filter Options will vary for each filter that you select.



## Basic Filters

The Basic Filters provides several options to display different types of content - but the content is pulled from just one area of the Publisher at a time. Basic Filters may pull from Hierarchy, Programs, Courses, or even Catalog information.

### All Levels > Departments

When you select the All Levels > Departments Filter, you are establishing a template that will provide a list of your Hierarchy displaying all levels (*institution and school/college*) and the departments they own. If no other options are selected, this will create a list of these items with no clickable links or other details available on the page, as shown in the example.



Under the “Other Options” heading, there are two additional checkboxes that you may select to turn on additional features.

The first one, “Include link to the institution, school/college or department description” will provide a link beneath each item that would direct the user to the description for each hierarchy item that displays within this filter. By default, this option will use a generic term within the link, listing for example, “Click here to see information for this department.”



If you would prefer that the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, “Use actual name of item in “Show/Hide” and description links instead of generic term.”



### Schools/Colleges

When you select the Schools/Colleges Filter, you are establishing a template that will provide a list of the school/college hierarchy items, not including the institution level or any departments they may own. If no other options are selected, this will create a list of these items with no clickable links or other details available on the page.



Under the “Other Options” heading, there are two additional checkboxes that you may select to turn on additional features.

The first one, “Include link to the institution, school/college or department description” will provide a link beneath each item that would direct the user to the description for each hierarchy item that displays within this filter. By default, this option will use a generic term within the link, listing for example, “Click here to see information for this department.”



If you would prefer that the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, “Use actual name of item in "Show/Hide" and description links instead of generic term.”

## Departments

When you select the Departments Filter, you are establishing a template that will provide a list of the department hierarchy items, not including the institution level or any school/colleges that may own them. If no other options are selected, this will create a list of these items with no clickable links or other details available on the page.

Accounting, Economics, Finance  
Agricultural Sciences  
Applied Sciences

Under the “Other Options” heading, there are two additional checkboxes that you may select to turn on additional features.

The first one, “Include link to the institution, school/college or department description” will provide a link beneath each item that would direct the user to the description for each hierarchy item that displays within this filter. By default, this option will use a generic term within the link, listing for example, “Click here to see information for this department.”

If you would prefer that the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, “Use actual name of item in "Show/Hide" and description links instead of generic term.”

## Programs

When you select the Programs Filter, you are establishing a template that will provide a list of programs with a status of Active-Visible. The Programs Filter will have two additional options to review.

Under the Programs heading, you will need to determine how you would like to group your programs within the Filter. There will be three options to choose from.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the programs will be sorted alphanumerically based on their names.
- **Program Type** - If Program Type is selected, the programs will be sorted based on the Program Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Program Types within the Item Types Module.

Once the Program Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Program Types, you may choose to display them within your Filter by enabling this feature.

Baccalaureate/Master

- Professional Accountancy B.P.A. and MBA with a minor in Accounting Certification
- Arts and Sciences All-Level Teacher Certification
- Computer Information Systems Teacher Certification, 8-12 Computer Science

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**Note:** In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Program Types, see the [Item Types Module](#).

- **Degree Type** - If Degree Type is selected, the programs will be sorted based on the Degree Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Degree Types within the Item Types Module.

Once the Degree Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Degree Types, you may choose to display them within your Filter by enabling this feature.

Bachelor of Fine Arts

- [Communication Arts B.F.A.](#)
- [Studio Art B.F.A.](#)

Bachelor of Music

- [Music Performance B.M.](#)

Bachelor of Professional Accountancy

- [Professional Accountancy B.P.A.](#)

**Note:** In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Degree Types, see the [Item Types Module](#).

If you choose to group programs by Program or Degree Type or choose No Grouping - this section allows you to determine how the programs will sort within that category. The default will be for programs to sort alphanumerically by name, but you may choose to use the Custom Ordering option as well.

If you choose Custom Ordering, a line of text indicating “All Programs will be Custom Ordered” will appear, followed by an option for Course Ordering. After choosing the option, you will need to click “Save and Set Custom Sorting” at the bottom of the page

On the next page, the first option will be for you to remove the Custom Ordering and revert to the sorting method described previously. If you wish to choose this option, click “Remove Custom Ordering.”

Below this is the “Manage Custom Ordering” section. In this screen, you will be able to use the drag-and-drop functionality to reorder the programs to the exact order you wish them to display within their grouping. You will see an icon  next to each program that you will be able to move, and hovering over the program will highlight the row. Next, left-click the item and hold while you drag the item to the new position, and then release. When you are done making your changes, click “Save Ordering” at either the top, or bottom of the page.

**Note:** You cannot drag programs between different groupings. For example, if your Filter displays Program Types, you cannot change a program’s type by dragging it from one group into another. The only way to change a program’s type is to edit the program directly.

**Bachelor of Arts**

-  [AgriBusiness B.A.](#)
-  [Biological Sciences B.A.](#)
-  [English B.A.](#)

**Note:** If you add additional programs after a Filter has been established with custom ordering, you will need to edit the Filter to incorporate the new program.

Rev. [11/2020]

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## Courses

When you select the Courses Filter, you are establishing a template that will provide a list of courses with a status of Active-Visible. The Courses Filter will have two additional options to review.

Under the Courses heading, you will need to determine how you would like to group your courses within the Filter. There will be two options to choose from.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the courses will be sorted alphanumerically based on their prefix, code, and name.
- **Course Type** - If Course Type is selected, the courses will be sorted based on the Course Type that has been assigned to the courses. Courses sharing a type will be grouped together, the type will display on the Filter above the associated courses, and the ordering will follow the ordering consideration applied to the Course Types within the Item Types Module.

### Accounting

Accounting courses require approval prior to registration.

- [ACCT 221 - Principles of Accounting I](#) Hours: Three
- [ACCT 222 - Principles of Accounting II](#) Hours: Three
- [ACCT 311 - Managerial Accounting](#) Hours: Three

Once the Course Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Course Types, you may choose to display them within your Filter by enabling this feature.

Beneath the grouping options is a checkbox for “Include program display field after each course.” If you have the program display field enabled within the Courses Template, you can also display the information, for many institutions this may be the credits field, for example, within a filter. For more information on the program display field, see the [Courses Template](#).

**Note:** In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a course associated with it, and the Filter must have option enabled. For more information about Course Types, see the [Item Types Module](#).

If you choose to group courses by type or choose No Grouping - this section allows you to determine how the courses will sort within that category. The default will be for courses to sort alphanumerically by name, but you may choose to add the prefix and code into that consideration as well.

**Note:** Custom Ordering is not an option for any filter involving courses.

## Archived Catalogs

The Archived Catalogs Filter can be used to create a Filter displaying links to each of your archived catalogs. This may be helpful when you have several archived catalogs, or when you would prefer a link in the Navigation rather than a list in the drop-down menu. Some schools have also chosen to include links to older PDF versions in the Page Description field as well, allowing them to provide even more versions of previous catalogs.

The first section after choosing the Archived Catalogs Filter will be to determine how you would like to group the catalogs together. You will have two options to choose from:

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- **No Grouping** - This option is selected by default. If No Grouping is selected, the catalogs will be sorted alphanumerically based on their name.
- **Catalog Type** - This option will sort your catalogs based on their types. For example, Undergraduate and Graduate catalogs will be separated based on the types that have been assigned to them.

Beneath these options is a checkbox indicating “Limit catalogs to those that have the same Catalog type as the current user selected catalog.” If this is selected, and the user viewing the Gateway currently has the Graduate catalog selected - then the Filter will only display archived catalogs that also have the Graduate type applied to them.



The next section will define which order the information from the Filter is displayed. If the Catalog Type grouping option is selected, each group will also be sorted in either ascending or descending alphanumeric order.

- **Ascending** - This option will sort the Archived Catalogs alphanumerically starting with 0-9 and then A-Z. Numbers will be sorted before letters. For example, “2018-2019 Graduate Catalog” will be listed before “Student Handbook 2018-2019.”
- **Descending** - This option will sort the Archived Catalogs in reverse alphanumeric order starting with Z-A and then 9-0. For example, “Student Handbook 2019-2020” would be listed before “2019-2020 Graduate Catalog.”

## Catalog Search

The Catalog Search Filter allows you to perform a search and save the results as a Filter. This may be helpful if you have a specific key word within your courses that you would like to make available - for example, some institutions have a hidden field in their Course Template with a word like “Honors” that they can search for and save as a Filter, so that they can direct users their quickly.

Enter the desired search keyword or phrase for the Filter. The “Find whole word or phrase only” option can be used to narrow the search. For example, rather than searching for any instance of “ENG” or “101”, it will refine the results to only instances of “ENG 101” placed together.

If you need to narrow it down further, you can use the Search Location tool. Select one (1) or more location for the search to retrieve the Keyword or Phrase. Each location’s results will be grouped together and listed based on the Search Options outlined in the Gateway Options Module > Settings Tab.



## Complex Filters

Complex Filters are going to combine hierarchy information with either program or course information. There are four different options for programs and four different options for courses.

### All Levels > Programs

The All Levels > Programs Filter is going to create a template that will display your entire hierarchy structure (including the institution, schools/colleges and departments) along with the programs owned by each one. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

Under the Programs heading, you will need to determine how you would like to group your programs within the Filter. There will be three options to choose from.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the programs will be sorted alphanumerically based on their names.
- **Program Type** - If Program Type is selected, the programs will be sorted based on the Program Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Program Types within the Item Types Module.

**Art**

[Go to information for Art.](#)

[Hide programs for Art.](#)

Bachelor of Arts/Bachelor of Science

- [Art B.A./B.S.](#)
- [Arts and Sciences All-Level Teacher Certification](#)
- [Photography B.A./B.S.](#)

Bachelor of Fine Arts

- [Communication Arts B.F.A.](#)

Once the Program Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Program Types, you may choose to display them within your Filter by enabling this feature.

**Note:** *In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Program Types, see the [Item Types Module](#).*

- **Degree Type** - If Degree Type is selected, the programs will be sorted based on the Degree Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Degree Types within the Item Types Module.

Once the Degree Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Degree Types, you may choose to display them within your Filter by enabling this feature.

**Note:** *In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Degree Types, see the [Item Types Module](#).*



If you choose to group programs by Program or Degree Type or choose No Grouping - the Program Ordering section allows you to determine how the programs will sort within that category. The default will be for programs to sort alphanumerically by name, but you may choose to use the Custom Ordering option as well.

If you choose Custom Ordering, a line of text indicating “All Programs will be Custom Ordered” will appear, followed by an option for Course Ordering. After choosing the option, you will need to click “Save and Set Custom Sorting” at the bottom of the page.

On the next page, the first option will be for you to remove the Custom Ordering and revert to the sorting method described previously. If you wish to choose this option, click “Remove Custom Ordering.”

Below this is the “Manage Custom Ordering” section. In this screen, you will be able to use the drag-and-drop functionality to reorder the programs to the exact order you wish them to display within their grouping. You will see an icon  next to each program that you will be able to move, and hovering over the program will highlight the row. Next, left-click the item and hold while you drag the item to the new position, and then release. When you are done making your changes, click “Save Ordering” at either the top, or bottom of the page.

**Note:** You cannot drag programs between different groupings. For example, if your Filter displays Program Types, you cannot change a program’s type by dragging it from one group into another. The only way to change a program’s type is to edit the program directly.

**Note:** If you add additional programs after a Filter has been established with custom ordering, you will need to edit the Filter to incorporate the new program.

The last section will be “Other Options.” This section has three options by default, and an optional fourth.

- **Use "Show/Hide" link.** - displays programs only after a collapsible show/hide link has been clicked, rather than loading them when the page initially loads. If there is a large amount of content, this option can help the page load much faster as the user can display only the selected portion of data rather than all.
- **Include link to the institution, school/college or department description.** - will provide a link beneath each item that would direct the user to the description for each hierarchy item that displays within this filter. By default, this option will use a generic term within the link, listing for example, “Click here to see information for this department.”
- **Use actual name of item in "Show/Hide" and description links instead of generic term.** - displays the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, “Use actual name of item in "Show/Hide" and description links instead of generic term.”
- **Include type descriptions for: (Optional)** - If you have provided any descriptive text within your Degree Types, you may choose to display them within your Filter by enabling this feature.



## Institution > Programs

The Institution > Programs Filter is going to create a template that will display only the institution and the programs directly owned by it. This Filter will not include any of the programs owned at the school/college or department level. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

As this Filter will display much less content than All Levels > Programs Filter, the “Use Show/Hide Link” will **not** be an option with this filter. All other options will be the same as listed within the [All Levels > Programs Filter](#).

## School/Colleges > Programs

The School/Colleges > Programs Filter is going to create a template that will display only the school/colleges and the programs directly owned by them. This Filter will not include any of the programs owned at the institution level. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

As this Filter will display much less content than All Levels > Programs Filter, the “Use Show/Hide Link” will not be an option with this filter.

By default, “Hide Department Programs” will be unchecked. Although you will not see the departments listed within the Filter, you will see any programs owned by departments owned by the school/colleges appearing within the respective entity in the filter. If you would like to limit this to only the programs owned directly by the school/colleges, you can check this option to hide the programs owned at the department level.

All other options will be the same as listed within the [All Levels > Programs Filter](#).

## Departments > Programs

The Departments > Programs Filter is going to create a template that will display only the departments and the programs directly owned by them. This Filter will not include any of the programs owned at the institution or school/college levels. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

For this Filter, a new option will be available under the Department & Program Ordering heading titled “Department Ordering”. By default, the departments will be organized in alphabetical order by their name - but if you would prefer, you can choose the “Current Hierarchy Ordering” option to instead organize them to match the ordering of your current hierarchy.

As this Filter will display much less content than All Levels > Programs Filter, the “Use Show/Hide Link” will not be an option with this filter.

All other options will be the same as listed within the [All Levels > Programs Filter](#).



## All Levels > Courses

When you select the All Levels > Courses Filter, you are establishing a template that will provide a list of courses with a status of Active-Visible to be organized across your entire hierarchy structure. The Courses Filter will have three additional options to review.

Under the Courses heading, you will need to determine how you would like to group your courses within the Filter. There will be two options to choose from.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the courses will be sorted alphanumerically based on their prefix, code, and name.
- **Course Type** - If Course Type is selected, the courses will be sorted based on the Course Type that has been assigned to the courses. Courses sharing a type will be grouped together, the type will display on the Filter above the associated courses, and the ordering will follow the ordering consideration applied to the Course Types within the Item Types Module.

Once the Course Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Course Types, you may choose to display them within your Filter by enabling this feature.

Beneath the grouping options is a checkbox for “Include program display field after each course.” If you have the program display field enabled within the Courses Template, you can also display the information, for many institutions this may be the credits field, for example, within a filter. For more information on the program display field, see the [Courses Template](#).

**Note:** In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a course associated with it, and the Filter must have option enabled. For more information about Course Types, see the [Item Types Module](#).

The next section is titled “Course Ordering,” and if you choose to group courses by type or choose No Grouping - this section allows you to determine how the courses will sort within that category. The default will be for courses to sort alphanumerically by name, but you may choose to add the prefix and code into that consideration as well.

**Note:** Custom Ordering is not an option for any filter involving courses.

The last section will be “Other Options.” This section has three options by default, and an optional fourth.

- **Use "Show/Hide" link.** - displays courses only after a collapsible show/hide link has been clicked, rather than loading them when the page initially loads. If there is a large amount of content, this option can help the page load much faster as the user can display only the selected portion of data rather than all.
- **Include link to the institution, school/college or department description.** - will provide a link beneath each item that would direct the user to the description for each hierarchy item that displays within this filter. By default, this option will use a generic term within the link, listing for example, “Click here to see information for this department.”

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### Art

[Go to information for Art.](#)  
[Hide courses for Art.](#)

Art

- ART 110 - Drawing I Hours: Three
- ART 111 - Two-Dimensional Design Hours: Three



- **Use actual name of item in "Show/Hide" and description links instead of generic term.** - displays the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, "Use actual name of item in "Show/Hide" and description links instead of generic term."
- **Include type descriptions for: (Optional)** - If you have provided any descriptive text within your Degree Types, you may choose to display them within your Filter by enabling this feature.

### Institution > Courses

The Institution > Courses Filter is going to create a template that will display only the institution and the courses directly owned by it. This Filter will not include any of the courses owned at the school/college or department level. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

As this Filter will display much less content than All Levels > Courses Filter, the "Use Show/Hide Link" will **not** be an option with this filter. All other options will be the same as listed within the All Levels > Courses Filter.

### School/Colleges > Courses

The School/Colleges > Courses Filter is going to create a template that will display only the school/colleges and the courses directly owned by them. This Filter will not include any of the courses owned at the institution or department levels. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

As this Filter will display much less content than All Levels > Courses Filter, the "Use Show/Hide Link" will **not** be an option with this filter.

All other options will be the same as listed within the All Levels > Courses Filter.

### Departments > Courses

The Departments > Courses Filter is going to create a template that will display only the departments and the courses directly owned by them. This Filter will not include any of the courses owned at the institution or school/college levels. Once this option has been selected, you will be able to select additional Filter options to further refine the template.

For this Filter, a new option will be available under the Department & Course Ordering heading titled "Department Ordering". By default, the departments will be organized in alphabetical order by their name - but if you would prefer, you can choose the "Current Hierarchy Ordering" option to instead organize them to match the ordering of your current hierarchy.

As this Filter will display much less content than All Levels > Courses Filter, the "Use Show/Hide Link" will not be an option with this filter.

All other options will be the same as listed within the All Levels > Courses Filter.



## Direct Filters

Programs, courses, and hierarchy entities are all examples of content that will not appear on the Navigation by default. In order for these items to be available, they must be included within a Filter. The Basic and Complex Filters provide options to create a list of items, but Direct Filters give you a way to create a Filter displaying contents about a specific item. You can use the Direct Filter to establish a Filter for a program, department, or school/college; each one with different options available.

### School/College

To begin a Direct Filter to a school/college, first you will need to select the radio button next to the drop-down menu, then you will need to select the school/college from the list.



The Filter Options will be initially broken into three categories - Hierarchy Items, Programs, and Courses. As you make additional selections, more options become available.

### Hierarchy Items

Under Hierarchy Items, the first item is to decide if you would like to include the description of the selected school/college.

- **Do not include description.** - This is the default selection. If selected, neither the descriptive content within the hierarchy module nor a link will be provided.
- **Include link to description.** - A link will be provided to view the description of the hierarchy item.
- **Include full description.** - The descriptive contents of the hierarchy item will display.

The next option is a checkbox to indicate if you would like to include the departments that are owned directly by this school/college. If you check this box, you will see the same three options again. The selection will apply to all departments.

**Note:** It is recommended to use the “Include link to description” option if you choose to include the departments. Many school/colleges own multiple departments and including the full descriptions for all of them may result in an extremely lengthy page with long load times for your end user.

## Programs

By default, no programs are included in this Filter. If you would like to see them included, check the box for "Include Programs." This will provide three options for determining how you would like to group the programs.

**Note:** *If you have included departments, the programs for each department will also display when this feature is enabled.*

- **No Grouping** - This option is selected by default. If No Grouping is selected, the programs will be sorted alphanumerically based on their names.
- **Program Type** - If Program Type is selected, the programs will be sorted based on the Program Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Program Types within the Item Types Module.

Once the Program Type option has been enabled, a new option will appear at the bottom under "Other Options" giving you the ability to include the type descriptions. If you have provided any descriptive text within your Program Types, you may choose to display them within your Filter by enabling this feature.

**Note:** *In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Program Types, see the [Item Types Module](#).*

- **Degree Type** - If Degree Type is selected, the programs will be sorted based on the Degree Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs, and the ordering will follow the ordering consideration applied to the Degree Types within the Item Types Module.

Once the Degree Type option has been enabled, a new option will appear at the bottom under "Other Options" giving you the ability to include the type descriptions. If you have provided any descriptive text within your Degree Types, you may choose to display them within your Filter by enabling this feature.

**Note:** *In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a program associated with it, and the Filter must have option enabled. For more information about Degree Types, see the [Item Types Module](#).*



## Courses

By default, no courses are included in this Filter. This section will provide three options for determining how you would like to include the courses.

**Note:** *If you have included departments, the courses for each department will also display when this feature is enabled.*

- **Do not include courses.** - This is the default selection. This option will exclude all courses from the Filter.
- **Include course links.** - This option will provide the courses within a list and the user may click each one to expand and view the details of them.
- **Include course details.** - This option provides the course with its description expanded, requiring no clicks from the user.

**Note:** *As a Best Practice, we suggest using the “Include Course Links” method. There are typically more courses than anything else within a catalog and displaying all of them at once with their full description expanded can take a considerable amount of time to display. To make it easier for your end user to load the content, it is recommended to use the list option.*

Under the Courses heading, you will need to determine how you would like to group your courses within the Filter. There will be two options to choose from.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the courses will be sorted alphanumerically based on their prefix, code, and name.
- **Course Type** - If Course Type is selected, the courses will be sorted based on the Course Type that has been assigned to the courses. Courses sharing a type will be grouped together, the type will display on the Filter above the associated courses, and the ordering will follow the ordering consideration applied to the Course Types within the Item Types Module.

Once the Course Type option has been enabled, a new option will appear at the bottom under “Other Options” giving you the ability to include the type descriptions. If you have provided any descriptive text within your Course Types, you may choose to display them within your Filter by enabling this feature.

Beneath the grouping options is a checkbox for “Include program display field after each course.” If you have the program display field enabled within the Courses Template, you can also display the information, for many institutions this may be the credits field, for example, within a filter. For more information on the program display field, see the [Courses Template](#).

**Note:** *In order for the Item Type description to display in the filter, the Item Type must have descriptive text, must be set to visible, must have a course associated with it, and the Filter must have option enabled. For more information about Course Types, see the [Item Types Module](#).*

The next section is titled “Course Ordering,” and if you choose to group courses by type or choose No Grouping - this section allows you to determine how the courses will sort within that category. The default will be for courses to sort alphanumerically by name, but you may choose to add the prefix and code into that consideration as well.

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**Note:** Custom Ordering is not an option for any filter involving courses.

The last section will be “Other Options.” This section has three options by default, and an optional fourth.

- **Use "Show/Hide" link.** - displays courses or programs only after a collapsible show/hide link has been clicked, rather than loading them when the page initially loads. If there is a large amount of content, this option can help the page load much faster as the user can display only the selected portion of data rather than all.
- **Use actual name of item in "Show/Hide" and description links instead of generic term.** - displays the actual name of the hierarchy entity display rather than the generic term, then you can also add the second checkbox, “Use actual name of item in "Show/Hide" and description links instead of generic term.”
- **Include type descriptions for: (Optional)** - If you have provided any descriptive text within your Item Types, you may choose to display them within your Filter by enabling this feature.

## Department

To begin a Direct Filter to a department, first you will need to select the radio button next to the drop-down menu, then you will need to select the department from the list.

The image shows a form element with a radio button on the left and a drop-down menu on the right. The radio button is selected, and the drop-down menu displays the word 'Art' with a downward-pointing arrow on the right side. The entire form element is enclosed in a light green border.

The options within the department Direct Filter will be the same as the options for the school/college filter but will not include the school/college option for hierarchy items.

## Program

To begin a Direct Filter to a program, first you will need to select the radio button next to the drop-down menu, then you will need to select the program from the list. There will not be any filter options for this Filter.



## EXTERNAL LINKS

External Links are used to place a link in the Navigation when you need to direct a user away from the catalog. It may be used to point them to your institutional website, for example. These are referring to only links within the Navigation - and are different from a hypertext link placed within the WYSIWYG editor.

When you navigate to the External Links Tab, you will see the “Add a new external link” tab, a search, and a list of any existing External Links.

External Link Name	Status	Preview
Our Website	Active-Visible	Preview

Within the table of existing External Links, the first column will list the “External Link Name.” This name will also serve as the clickable link text that will appear within the navigation.

The “Status” column indicates the active status - an External Link can be either Active-Visible or Inactive-Hidden. The last column is the preview link - and clicking this link will open the destination URL in a pop-up window.

To create a new External Link, click on “Add a new external link.” On the next page, the first field will be the “Navigation Link Label.” This will be the name of the External Link, as well as the clickable link text that appears in the Navigation. This field allows a maximum of 200 characters and does not permit any formatting.

The next field is “Link URL” and will be where you provide the URL you would like to direct the user to. You will need to include the full URL, inclusive of the protocol (http:// or https:// in most cases) and the “www” / “.com” in order for this to function.

**Note:** *Not including the protocol (http:// or https://) will result in an error when attempting to save the content; even though many browsers would fill this content in for you. This will be required within the Publisher to save the content. As for the ‘www’ - some websites require it, and some don’t. We suggest it as a Best Practice to ensure it works; but if you test it and it works without it - you can certainly go without!*

Next, determine how you would like to load the URL. The default selection will be to load the URL in a new window, as this is also the Best Practice we suggest when you are creating a hypertext link within the editor that would direct a user to content outside of your catalog. This way, if the user spends a lot of time on the new link - they have an easy way back to your catalog content without needing to rely on the browser back button.

The last item will be the Active-Status; allowing you to change between Active-Visible and Inactive-Hidden. External Links set to Active-Visible will be added to the Navigation.



## CUSTOM PAGES

Custom Pages are built directly within the database and usually contain the static narrative content found in the front of the book (policy info, academic calendar, president's message, etc.).

To manage Custom Pages, navigate to the Custom Pages tab. Here, you will find the “Add a new custom page” link, the search, and a table displaying any existing Custom Pages.

Within the table, you will see three

columns. The first column displays the “Custom Page Name”, which is also the Navigation Link Label - and serves as the clickable link text that will display in the Navigation.

The second column indicates the status. A Custom Page can have three possible status options:

- **Active-Visible** - The Custom Page will display in the Navigation and be visible on the Gateway. You may create PermaLinks to this Custom Page, and it will show up in search results.
- **Active-Hidden** - The Custom Page will not display in the Navigation, but you can still create PermaLinks to it and it may show up in search results.
- **Inactive-Hidden** - The Custom Page will not be visible on the Gateway at all. PermaLinks to this Custom Page will be disabled.

To edit a Custom Page, click on the page name. This will direct you to the Summary Tab, which will display details about the page such as the Page Header, the Navigation Link Label, Status, its Creation Date, when it was Last Modified and the user who performed those actions.

<b>Page Header:</b>	Administrative Procedures
<b>Navigation Link Label:</b>	Administrative Procedures
<b>Status:</b>	Active-Visible
<b>Creation Date:</b>	09/12/2013 16:58:48 by Digital Architecture
<b>Last Modified:</b>	06/04/2020 11:21:34 by Mara Sansolo

**Note:** At the top of the page you will find an “External Custom Page URL.” This URL is provided so that you can link to this Custom Page from another location - such as your institutional website. This URL is specific to this page within this catalog only - if you make a copy of this catalog for next year, you would need to update this URL on your website. If you would like to link to this page from another location within the catalog - you should use the PermaLink feature within the WYSIWYG editor.

Next, navigate to the edit tab. The first item you'll see is the Edit Lock - this item just indicates that the page is locked by you to prevent other users from editing the content. For more information about the Edit Lock, see the section on [Edit Locking](#).

The first field you will see is the “Navigation Link Label,” which is what will appear as the clickable link in your Gateway navigation. This field has an asterisk, indicating that it is a required field. This field is limited to 200 characters and does not allow any formatting.

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Next, you will see the optional “Page Header” field which is what will appear at the top of the page when it is viewed on the Gateway; if you leave this blank, the Navigation Link Label will be used as the Page Header. This field only needs to be filled in when you would like to have the text in the Navigation differ from the title of the page, for example, you may want a shortened version of the page title to be used. Some institutions may choose to place “University Calendar” in the Navigation and then display “2020-2021 University Academic Calendar” as the Page Header.

The page contents are managed within a single WYSIWYG Editor and allows for unlimited amounts of content to be entered. The WYSIWYG Editor is covered in detail in the [WYSIWYG Editor](#) section of this document.

Below the “Page Content” field, you can determine the active status of your custom page. If you choose “Active-Hidden” as the page’s status, you can choose whether the page should be displayed in search results by selecting or deselecting the “Searchable?” checkbox. At the bottom of the page, you can save or cancel your changes.

If you have selected Active-Visible as the status, it will be added to the Navigation automatically at the bottom of the list. You can access the Navigation tab and reorder the items as you see fit.

**Note:** *If you are editing the Catalog Home Custom Page, you will only be able to edit the page content field.*

## MEDIA FILES

Media files offer you a way to incorporate various types of media (images, Microsoft Word documents, PDFs, Flash files, etc.) into your online catalog. Such files are useful for including things such as a campus maps, faculty photos, or promotional videos. To use a media file, you will first need to upload them.

To access the media files, you will need to select the Media Files Tab. From this page, you will see the “Add a new media file” link, the search, and a table listing any existing media files.

Within the table, you will see five columns. The first one will list the “Media File Name,” which will act as the Navigation Link Label or clickable link text for any that are listed as Active-Visible.

Media File Name	Filesize	Original Filename	Status	Preview
acalog™ University Organizational Chart	233.74 KB	organizational_chart.jpg	Active-Hidden	<a href="#">Preview</a>
Front Cover Image	29.12 KB	front_cover.jpg	Active-Hidden	<a href="#">Preview</a>
Logo	12.38 KB	logo.jpg	Active-Hidden	<a href="#">Preview</a>

The second column indicates the “Filesize” of each item, followed by the “Original Filename,” then the “Status” and then the “Preview.”

Clicking on the name of any existing media file will direct you to the Summary Tab, which will display details about the file such as the Media File Label, Status, its Creation Date, when it was Last Modified and the user who performed those actions. Selecting the Edit Tab will allow you to modify the Navigation Link Label, upload a new file, change the Active Status, or delete the file.



To add a new media file, navigate to the Media File tab, and then click “Add a new media file.” The first field you will be asked to fill out is the “Navigation Link Label.” For media files, this is only used to identify them within the Publisher, or if the status is set to Active-Visible, it will be used as the clickable link text within the Navigation. This field has a maximum of 200 characters and no formatting is allowed.

Next, you will be able to upload a file of your choice. You are able to upload files up to 25 MB per file, and you are not restricted by type - however there are some suggestions to keep in mind.

These three are suggested for displaying images on the web, and can be inserted directly into the WYSIWYG editor after they have been uploaded:

- **JPEG** - Joint Photograph Experts Group. These are images that have been compressed to a small file size. This format is usually used for photographs on the web because they can create small files that look great - but they are not as good for logos or graphics.
- **GIF** - Graphic Interchange Format. This format also compresses content into a small file, but in a different way from a JPEG. They have a very limited range for printing - but are very useful for displaying logos or small animations on the web.
- **PNG** - Portable Network Graphics. This format is used exclusively on the web, but it does not display photographs as well as a JPEG does.

**These options are not suggested:**

- **TIFF** - Tagged Image File Format. TIFF images are typically very large file sizes - they are usually uncompressed and contain very detailed images. They are common in photo software like Photoshop or page layout software like Quark and InDesign - but they’re not great for the web due to the large file size.
- **BMP** - Bitmap. These files do not use compression and result in very large file sizes.
- **RAW** - Unprocessed images created by a scanner or camera.

You can also upload video - however 25 MB is a very small allotment. Acalog does not support embedding video content directly into the editor, so references to the video will result in a pop-up window.

PDFs and other downloadable content are supported as well and may be provided through a PermaLink in the WYSIWYG editor or through the Navigation if the status is set to Active-Visible.

# PermaLink Usage Module

As PermaLinks are created throughout Acalog, the item being reference through the PermaLink becomes unable to be deleted if that PermaLink exists in order to maintain the integrity of the link. This is how Acalog prevents running into issues such as a “Not Found” error.

As you will likely need to remove some items at some point, the PermaLink Usage Module provides you with a tool to track where these PermaLinks are being used across the database. To learn more about using PermaLinks, see the section on the [WYSIWYG editor](#).

To use the PermaLinks Usage Module, you will need to navigate to the PermaLink Usage Tab at the top. If you navigate to the module and are unsure where to navigate - the last sentence of the page will direct you.

The next page will present you with the search. You may use the drop down to search for a specific type of item - any item that you can PermaLink to, including Hierarchy, Programs, Courses, Filters, Custom Pages, or Media Files.

Once you have made the selection on the location, additional filter options may become available to help narrow the search. If you aren't sure, you can just click “Search” to return a list of all items within that category containing PermaLinks.

**PermaLink Search**

Search for: \*

Courses ▼

Prefix:  Code:

Search Keyword or Phrase:

[Search](#)

PermaLink Name	Usage
Course: ENG 434 - Literature and Film	<a href="#">1 Item</a>
Course: ENG 432 - History and Aesthetics of Film	<a href="#">1 Item</a>

When viewing the results, the PermaLink Name will list the item that has a reference to it. The “Usage” column will indicate how many items throughout the Publisher contain a reference to that item. Clicking on the link in the Usage column will create a pop-up window that will list each of the items, along with a clickable link, so that you may quickly navigate to each one and locate the PermaLink as needed.

**PermaLink Usage**

[Refresh](#)

Item Name
Custom Page: <a href="#">Common Course Numbers</a>
Custom Page: <a href="#">Academic Procedures</a>
Custom Page: <a href="#">Administrative Procedures</a>

# Item Types Module

Item types are used to help organize information that is displayed in filters on the Gateway. A filter that is set to sort by type will have system inserted headers for each type, appearing above the list of items that have that type assigned. Item types can also be used when searching for items. Although item types are optional, we do highly recommend using them - if you don't, the only option for sorting will be alphabetical.

Although there are five tabs available in the Item Types Module, only the following three are used.

**Note:** *The School/Colleges and Departments tab are no longer used within the system and should not be modified.*

- **Course Types** - assigned to courses and are usually a direct translation of a prefix. For example, the prefix CHEM would have a course type “Chemistry”
- **Degree Types** - assigned to programs, these types typically designate the actual degree a student would receive for completing the associated program. For example, the program English, BA would have a degree type of “Bachelor of Arts.”
- **Program Types** - assigned to programs, these types are typically broader and are used to separate things like Majors and Minors. For example, the same English, BA program would have a program type of “Major.”

**Note:** *Catalog types are managed from within the Catalogs module. All the other item types are distinct within each catalog. For example, “Graduate” and “Undergraduate” catalog types will be the same when editing any catalog; however, you can have different course, program and degree types within each catalog.*

Although they are used in different places, they are created and managed in exactly the same way.

## CREATING AND EDITING AN ITEM TYPE

To create an Item Type, select the tab that corresponds to the appropriate type: Program, Degree, or Course.

On this page, you will see the “Add a new \_\_\_\_\_ type” link and a table listing all of the existing types within this

Program types may be reordered using drag and drop. Click the Save Ordering button to record ordering changes. See the Help page for more information about using drag and drop.

Program Types	Show Description?
 <a href="#">Undergraduate Major</a>	No
 <a href="#">Undergraduate Minor</a>	No

category.

Rev. [11/2020]

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Within this table, there are two columns. The first one is “\_\_\_\_\_ Types,” which will list the name of each type and the second one is “Show Description,” which indicates if the item type has a visible description.

If you click on any of the type names, you will be taken to the Summary Tab for that item where you can see the Type Name, Type, Description Status, Creation Date, Last Modified Date, and the user who performed those actions. If you wish to modify this type, you can click the Edit Tab to make any changes.

To create a new type, click on “Add a new program type.” The first field will be the “Type Name,” which is indicated as a required field. The text entered here is what would display on any filter pages where this type is referenced. This field has a maximum of 255 characters and does not allow any formatting.

The Type Description field is optional and provides a WYSIWYG editor. You are able to enter any formatting necessary. Once you have entered content into this field, if you would like it to be able to display you must ensure that you check “Allow description display” at the bottom before clicking “Save.”

**Note:** *Enabling the description display here does not automatically display the content - any filter where the type will display must also allow for the description to display in order for it to appear. For more information, see the section on [Filters](#).*

Once Item Types have been created, they will display on filters in the order that they are presented here. The table they are listed in does provide the drag-and-drop function as noted by the icon  appearing to the left of each item type’s name. To reorder the types, hover over the item to highlight it - either over the icon or in the space to the right. Left-click and hold while you drag the type to the new location, release, and then click “Save Ordering” at the top or bottom of the page.

## DELETING AN ITEM TYPE

If you need to delete an Item Type, you will need to select the appropriate type from the tabs at the top: Program, Degree, or Course. Next, select the type you wish to delete from the list of available options to be taken to the Summary Tab. From here, select the Edit Tab.

The checkbox, “Delete this type?” will be at the bottom of the page. Once you click this checkbox, you will be prompted to confirm that you wish to permanently remove it, once you confirm you will need to click delete again to remove it from the system. Removing an Item Type is considered a permanent action and cannot be undone.

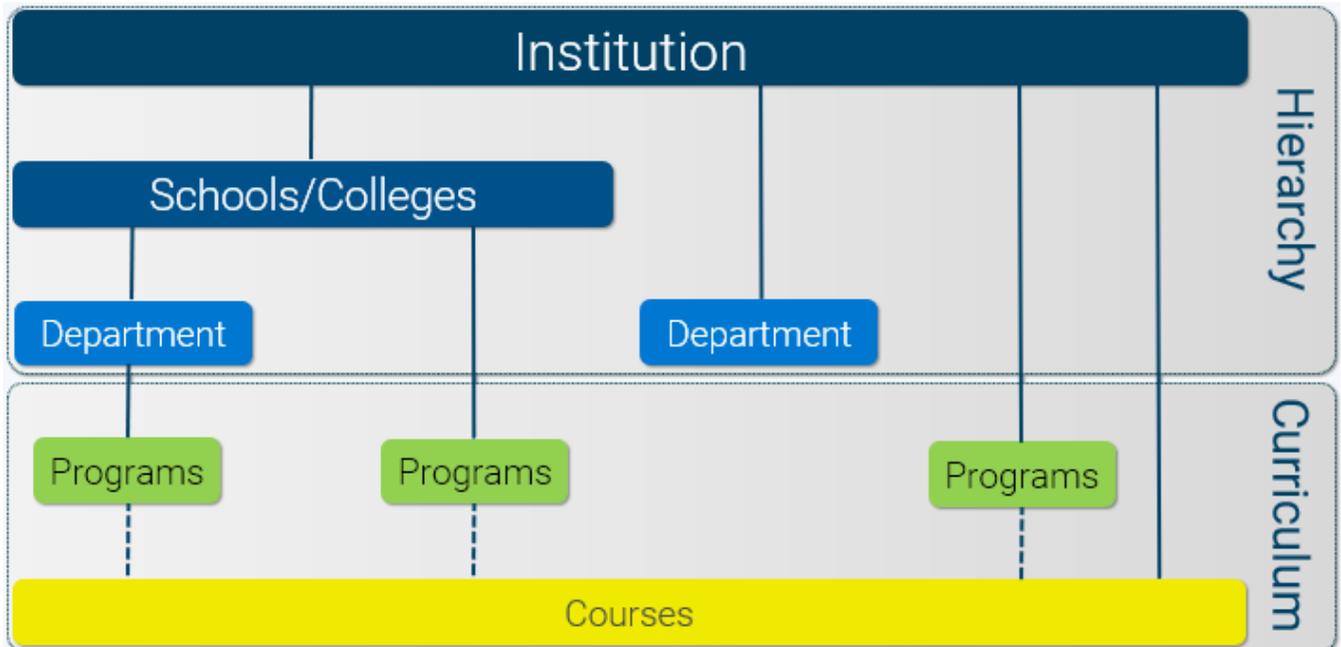
**Note:** *When you choose to delete an Item Type, you will be removing the association with any content it previously held. Any programs or courses previously associated with that item type may now appear under “Other” within filters as a result of this removal.*

# Hierarchy Module

Because the structure of every university and college is unique, Acalog allows you to structure your catalog in a way that is parallel to that of your institution. This is accomplished by including three distinct "levels" in Acalog, as shown in the diagram below.

- **Institution** - the umbrella hierarchy item that owns all other items whether directly or indirectly. There will only be one Institution level entity.
- **School/College** - owned by the Institution and may in turn own Departments, Programs, or Courses. Cannot own other School/Colleges.
- **Departments** - owned by the Institution or a School/College and may in turn own Programs or Courses. Cannot own other Departments.

**Note:** The terms "Institution," "School/College," and "Department" are customizable if these do not fit your current structure. For example, some schools may use the terms "Divisions." If you would prefer to change these terms, please contact our Client Care team, [support@digarc.com](mailto:support@digarc.com) or use the Support widget in the lower-left corner of your Publisher.





**Note:** Programs do not have ownership over courses; courses are attached to programs as requirements but are owned by a hierarchy item.

When you navigate to the Hierarchy module, you will be directed to the Institution Management page, which will provide a brief overview of the function of the Hierarchy. To use the Hierarchy Module, you will need to navigate to the Hierarchy Tab at the top of the page. If you navigate to the module and are unsure where to navigate - the last sentence of the page will direct you.

On the Hierarchy Tab, you will find the “Add a new hierarchy item” link as well as the table displaying all existing Hierarchy entities.

Hierarchy Item Name	Status	FlashPoint™ Link
Institution: <a href="#">acalog University [Preview]</a>	Active	Not Available
School/college: <a href="#">College of Arts and Sciences [Preview]</a>	Active-Visible	None <a href="#">[New Link]</a>
Department: <a href="#">Agricultural Sciences [Preview]</a>	Active-Visible	None <a href="#">[New Link]</a>
Department: <a href="#">Art [Preview]</a>	Active-Visible	None <a href="#">[New Link]</a>
Department: <a href="#">Biological and Environmental Sciences [Preview]</a>	Active-Visible	None <a href="#">[New Link]</a>

**Note:** In most instances, you will likely be working from a copy of a previous catalog, which will include an already established Hierarchy structure. Should you ever decide to build a new catalog entirely from scratch - the Hierarchy will be one of the first items to establish, as you will not be able to enter any program or course data without this structure.

When viewing the table of existing entities, there will be three columns. The first one will list the “Hierarchy Item Name.” Hierarchy entities will not be added to the Navigation, so this text will not serve as the clickable link text. It will be used to identify entities when associating programs and cores, [managing course imports](#), or importing content from Curriculog through Integration Manager. Following the name will be a preview link, which will launch the Publisher Preview.

The “Status” column will display the active status of each entity. As Hierarchy items are not added directly to the Navigation, the status options are limited to just “Active-Visible” or “Inactive-Hidden.”

**Note:** Changing the status of a Hierarchy entity to Inactive may have far-reach impacts across your catalog. If a school/college were to be set as inactive, then all departments, programs, and courses owned by the school/college will also be set to inactive. If there are any [direct filters](#) to the entity, the filter will also be automatically made inactive.

The last column, “FlashPoint Link,” will indicate if any FlashPoint Links have been associated with this entity. FlashPoint Links will be covered in the [FlashPoint Links Module](#) section.

**Note:** When previewing contents that contain a FlashPoint Link, the Publisher Preview will only display the text associated with the link. When published and viewed from the Gateway, the icon will display as expected.

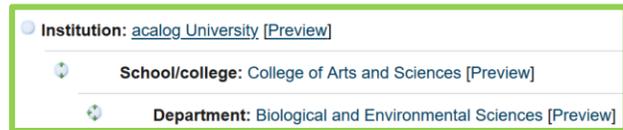
### Enterprise Edition Specific Feature

For a system-level catalog that has been assigned to organizations, hierarchy items must be created and managed at the system-level or within each organization. You may not create or manage hierarchy items at both locations.



## STRUCTURE AND ORDERING

When viewing the Hierarchy table, you will see the same structure reflected here that was illustrated above. The ownership of each item is indicated by level of indention, and the icon associated with each item indicates where it may be moved.



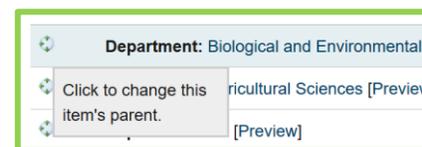
The Institution will always be the first item listed. The icon associated with it will be a blank circle - ○ - indicating that this item cannot be reordered or reparented. It will be listed farthest to the left and will be the only item at this level. This item's name typically reflects that of your institution.

The School/college will always be placed in the second level of indention, as they are owned directly by the Institution. The icon associated with school/college entities will be a circle with arrows pointing up and down - ⇅ - indicating that this item may be reordered but it must stay at its current level. School/colleges cannot own other school/colleges so there will not be any other valid parents to move the item to.

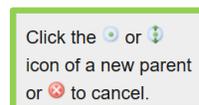
The Departments can be placed in the second level of indention, as they may be owned directly by the Institution; or they can be placed in the third level of indention, as they may be owned directly by a school/college. The icon associated with school/college entities will be a circle with arrows pointing up and down and one to the left - ⇅◀ - indicating that this item may be reordered or reparented. Departments may not own other departments, but the ownership can be changed between the institution or school/college entities.

The table the entities are listed in does provide the drag-and-drop function as noted by the icons - ⇅ or ⇅◀ - appearing to the left of each entity's name for the school/college and department entities. To reorder the entities, hover over the item to highlight it - either over the icon or in the space to the right. If you click directly on the name or on the preview link, you may be redirected to the Summary or Publisher Preview. Left-click and hold while you drag the type to the new location, release, and then click "Save Ordering" at the top or bottom of the page.

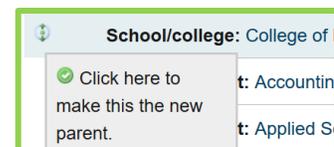
For departments, the table also provides the ability to reparent, as noted by the icon ⇅◀. To reparent a department level item, hover over the icon of the department you would like to move. This will display a tooltip, indicating you need to click directly on the icon to the left of the entity's name.



Next, a second tooltip will appear next to your mouse indicating that you will need to select the new parent and click on the icon associated; or click the X icon to cancel.



Once you have selected the icon, navigate to the entity you would like to designate as the new parent. Hover of the new parent's icon for an additional tooltip, then click the icon to place the department.



Once the item has been reparented, you may also choose to reorder the department within the new parent if needed, and then click "Save Ordering" at the top or bottom of the page.

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## CREATE A NEW HIERARCHY ITEM

To create a new Hierarchy entity, click the “Add a new hierarchy item” link.

The first field on the next page will be “Create Under.” This field is used to indicate the parent for the entity you are creating. As there can only be one institution, you may create either a department or a school/college. The drop-down menu will list the institution and school/colleges as available parent options. The option selected here will impact the available options in the next field.

If you select the Institution, then under “Hierarchy Item Type” you will be able to choose either school/college or department. If you select any of the school/colleges, you will only be able to select department.

**\*Create Under:**

Select One...

Select One...

Institution: acalog University

School/college: College of Arts and Sciences

School/college: College of Business & Technology

School/college: College of Education and Human Services

**Hierarchy Item Type: \***

[School/colleges may only be created under the institution. Departments may be created under the institution or a school/college.]

School/College

Department

The next field is “Hierarchy Item Name.” Hierarchy entities will not be added to the Navigation, so this text will not serve as the clickable link text. This will be used to display on filter links, and how you will reference the ownership of programs or courses, and what will appear within your Courses Export. This field allows a maximum of 255 characters and no formatting is allowed. This field is a required field.

**Note:** *Acalog will permit two entities to have identical names, however it is not recommended. This may cause difficulty during a course import or when using Integration Manager as it relies on the name of the entity to be unique to be able to identify it.*

The “Description” field is optional and allows you a WYSIWYG editor with an unlimited amount of characters for you to enter any descriptive text necessary to describe the entity. Information entered here may appear on the Gateway anywhere the entity is displayed.

The “Code” and “Type” fields are remnants of an old version and are **no longer used by the system**. This statement is also included on the page to serve as a reminder.

**Note:** *Although the text under “Type” indicates “Create types in the Item Types module.” - it is not recommended to create school/college or department types within the Item Types Module. This feature is no longer utilized by the Publisher and may result in errors.*

The “Currently Active?” checkbox determines if this item is visible on the Gateway. The active status of a Hierarchy item will also impact any items that it owns.

Check the “Searchable?” box to determine if the content of that hierarchy item can be searched using the Gateway Search feature. If an item is inactive, this box will automatically be de-selected and grayed out.



Once all content has been added, click the “Save” at the bottom of the page to create the new entity. After creation, it will be added to the Hierarchy table placed under the parent entity, as the last entry. If you would like to change the ordering, you may reorder it at that time.

## EDITING A HIERARCHY ITEM

To edit a Hierarchy entity, click on the name of the entity you would like to modify to be directed to the Summary Tab. The Summary Tab will display details such as the name, active status, creation and last modified dates, and the user who performed those actions.

To modify the item, navigate to the Edit Tab.

From the Edit Tab, you will **not** be able to change the ownership of the entity. The ownership will be displayed for your reference, but it can only be modified from the Hierarchy Tab using the drag-and-drop functionality.

<b>Department: Educational Leadership</b>	
Name:	Educational Leadership
Code:	
Active:	Active-Visible
Type:	
Creation Date:	09/12/2013 16:58:45 by Digital Architecture
Last Modified:	09/02/2020 11:07:24 by Mara Sansolo

<b>Created Under: *</b> College of Education and Human Services
--

You may edit the Name, Description, Status, and Searchable Options, as well as choose to delete the entity.

**Note:** *Deleting a hierarchy entity is a permanent action that cannot be undone and may have far reaching consequences. If you were to delete a department, all the programs and courses owned by that department would be reparented to the next level up. This may be the school/college or even the institution that directly owned the department. If the entity is associated with any Direct Filters, those filters will be made inactive when the entity is deleted.*

When you are done making modifications, click the “Save” at the bottom of the page.



## PROGRAM & COURSE DISPLAY

The Program & Course Display feature allows you to quickly display any programs or courses that are directly owned by an entity without establishing a filter. The list of programs or courses would only appear when viewing the entity directly on the Gateway and would not display in addition to filtered content.

This tool does not offer as many options as a filter but does provide a quick way to display the content. Once you have determined if you would like to display programs, courses, or both - be sure to save the page. You may then use the Publisher Preview to review how it will appear when presented on the Gateway.

### Programs

To display the programs within the entity, check the box to “Display all programs assigned to this department below its description” and then determine a method for how they should be grouped. For programs, there is also an option to display only active-visible programs. This is helpful when you have programs you are intentionally preventing from appearing in a filter - for example, a general education program that does not offer a degree, but you have created PermaLinks to and reference often.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the programs will be sorted alphanumerically based on their names.
- **Program Type** - If Program Type is selected, the programs will be sorted based on the Program Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs.
- **Degree Type** - If Degree Type is selected, the programs will be sorted based on the Degree Type that has been assigned to the Programs. Programs sharing a type will be grouped together, the type will display on the Filter above the associated programs.

### Courses

To display the courses within the entity, check the box to “Display all courses assigned to this department below its description” and then determine a method for how they should be grouped.

- **No Grouping** - This option is selected by default. If No Grouping is selected, the courses will be sorted alphanumerically based on their prefix, code, and name.
- **Course Type** - If Course Type is selected, the courses will be sorted based on the Course Type that has been assigned to the courses. Courses sharing a type will be grouped together, the type will display on the Filter above the associated courses.

#### Educational Technology

A major in educational technology on the master's level is offered. For undergraduates preparing for professional education to acquire competencies needed for appropriate for students majoring in business and industry to help them acquire

#### Programs

Undergraduate Major

- Instructional Training and Design B.S.

#### Courses

Educational Technology

- ETEC 224 - Computer Literacy
- ETEC 424 - Integrating Technology into the Middle/Secondary Curriculum
- ETEC 489 - Independent Study

Training and Development

- TDEV 370 - Supervised Work Experience in Industry and Business
- TDEV 410 - Utilizing Effective Instructional Techniques
- TDEV 411 - Managing the Instructional Environment

## Programs & Cores Module

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Acalog gives you the flexibility to create a catalog that fits your specific needs - and the Programs & Cores Module works towards that goal by allowing you to create and display any number of programs. The term “program” is used by Acalog to define what many institutions may refer to as majors, minors, certificates, requirements, degrees, pathways, or plans of study.

Acalog uses a cored method to display this program information - essentially creating an outline format that is easy to read and easy to build.

**Note:** If Custom Permissions are enabled, non-manager level users may have even fewer permissions and they will be designated by two icons:

 - Indicates permission to edit the selected item has been granted.

 - Indicates permission to edit the item has been revoked. The Edit Tab will not be available.

### Enterprise Edition Specific Feature

When viewing the Programs, you’ll find that each item has an additional icon appearing next to it. Hovering over the icon will provide a tooltip identifying its purpose.

 - Indicates that content is housed at the System Level and cannot be modified within an Organization but may appear within several aliased catalogs.

 - Indicates that content is housed within an Organization. The content is not shared across multiple catalogs and may be edited at this level.



As an example, the first image shows a program as it may appear with a traditional catalog.

**Major—B.A. Biology, Teacher Certification, 7-12 (36 Hours)**

Secondary certification in Biology requires a baccalaureate degree consisting of 36 credits of specified biology courses, a minor in chemistry, specified cognates, and completion of professional education courses (page 138) for licensure.

The student must apply for Initial Admission to the Teacher Education Program (usually by the end of the sophomore year) after completing all requirements as outlined under ADMISSION PROCEDURES in the School of Education and Psychology section of the *Catalog*. Initial admission is required before the student can enroll in upper division education courses.

The student must also complete an application and all other requirements for Admission to Student Teaching. Prior to the professional semester, the student must take and pass the PRAXIS II licensure exam—both the appropriate section of the Principles of Learning and Teaching, and the particular specialty test(s) for the licensure area(s).

Required Biology Core Courses		Hours	Chemistry Minor		Hours
	Biology Core Courses	26	CHEM 151-152	General Chemistry	8
BIOL 330	General Microbiology	4	CHEM 311-312	Organic Chemistry	8
BIOL 408	Flowering Plants & Ferns		CHEM 351	Biochemistry I	3
	OR	3	<b>Required Cognates</b>		
BIOL 409	Smoky Mt. Flora		ERSC 105	Earth Science	3
BIOL 418	Animal Physiology	3	MATH 215	Statistics	3
			PHYS 127	Exploring Physics I	3

To be migrated into Acalog, several program elements must be defined:

**Name:** B.A. Biology, Teacher Certification 7-12 (36 Hours)

**Degree Type:** Bachelor of Arts

**Program Type:** Major

**Description:** *The three paragraphs of descriptive text before the course requirements*

**Cores:** Required Biology Core Courses, Chemistry Minor, Require Cognates

Within these cores, there are several courses listed, and in some cases, ad-hoc text as well.

Once these items have been identified, you place the same elements into Acalog into the corresponding fields, which will take the above program and convert it into the following example:

Utilizing this cored structure provides a consistency across the catalog and is the only method compatible for use with Curriculog.

Although this sample program contains only three cores - a program may also contain sub-cores and shared cores to help organize your catalog.

- Core:** A core exists within a particular program and consists of a title, descriptive text (optional) and (possibly) associated courses. An example of a core in a program such as “Psychology Major” might be “Major Requirements” or “Suggested Curriculum.”
- Sub-Core:** A sub-core has the same structure as a core but exists within a core or another sub-core (often marked by a subheading in your print catalog). An example of a sub-core under the “Major Requirements” core might be “Introductory Courses.” An example of a sub-core under the “Suggested Curriculum” core might be “First Year-First Semester.”
- Shared Core:** A shared core has the same structure as a core; however, the same shared core can be part of multiple programs. This saves the work of repeatedly entering the same information into multiple programs. Shared cores will be explained in more detail in the [section](#) below.

There are two tabs within the Programs & Cores Module - Programs and Shared Cores. Shared cores are managed separately from programs and later attached. Each tab is explained below.

### B.A. Biology, Teacher Certification, 7-12 (36 Hours)





Secondary certification in Biology requires a baccalaureate degree consisting of 36 credits of specified biology courses, a minor in chemistry, specified cognates, and completion of professional education courses for licensure.

The student must apply for Initial Admission to the Teacher Education Program (usually by the end of the sophomore year) after completing all requirements as outlined under **ADMISSION PROCEDURES** in the School of Education and Psychology section of the Catalog. Initial admission is required before the student can enroll in upper division education courses.

The student must also complete an application and all other requirements for Admission to Student Teaching. Prior to the professional semester, the student must take and pass the PRAXIS II licensure exam-both the appropriate section of the Principles of Learning and Teaching, and the particular specialty test(s) for the licensure area(s).

#### Required Biology Core Courses

- Biology Core Courses **Credit Hours: 26**
- [BIOL 330 - General Microbiology](#) **Credit Hours: 4**
- [BIOL 408 - Flowering Plants & Ferns](#) **Credit Hours: 3**
- OR
- [BIOL 409 - Smoky Mt. Flora](#) **Credit Hours: 3**
- [BIOL 418 - Animal Physiology](#) **Credit Hours: 3**

#### Chemistry Minor

- [CHEM 151 - General Chemistry](#) **Credit Hours: 4**
- [CHEM 152 - General Chemistry](#) **Credit Hours: 4**
- [CHEM 311 - Organic Chemistry](#) **Credit Hours: 4**
- [CHEM 312 - Organic Chemistry](#) **Credit Hours: 4**
- [CHEM 351 - Biochemistry I](#) **Credit Hours: 3**

#### Required Cognates

- [ERSC 105 - Earth Science](#) **Credit Hours: 3**
- [MATH 215 - Statistics](#) **Credit Hours: 3**
- [PHYS 127 - Exploring Physics I](#) **Credit Hours: 3**



## PROGRAMS

When you navigate to the Programs & Cores Module, you will land on the Programs Tab by default. Here you will be able to see the search, an alphabetical list, the “Add a new program” link, and the list of all currently existing programs.

The table of programs will list ten programs at a time, in alphanumeric order. If you select a letter or the pound symbol from the alphabetical list, the programs will sort and list the programs beginning with that selection.

Within the table are three columns. The first is “Program Name” This will indicate the name of the program, which will also appear within any filters the program displays in. The second column is “Status” which will indicate the active-status of the program, and the third Column, “FlashPoint Link,” will indicate if any FlashPoint Links have been added. FlashPoint Links will be covered in more detail in the [FlashPoint Links Module](#).

The screenshot shows the 'Manage programs' interface. At the top, there are tabs for 'Programs' and 'Shared Cores'. Below that is a dropdown menu for 'In Process Undergraduate Catalog 2020-2021' and a 'Go' button. A search bar is labeled 'Find a Program' with a '+ New Program' button. Below the search bar are checkboxes for 'Search by program code' and 'Show only active programs'. There are radio buttons for 'Sort results: Alphabetically' (selected) and 'By Rank'. A 'Search' button is present. Below the search options is an alphabetical list of letters: # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z. At the bottom, there is a table with three columns: Program Name, Status, and FlashPoint™ Link.

Program Name	Status	FlashPoint™ Link
<a href="#">Accounting B.B.A. (Preview)</a>	Active-Visible	None <a href="#">(New Link)</a>
<a href="#">Accounting Minor (Preview)</a>	Active-Visible	None <a href="#">(New Link)</a>
<a href="#">AorBusiness B.A. (Preview)</a>	Active-Visible	None <a href="#">(New Link)</a>
<a href="#">AorBusiness B.S. (Preview)</a>	Active-Visible	None <a href="#">(New Link)</a>

## Create a New Program

To create a new program, click on the “Add A New Program” link. The first field on the page will be a required field - “Program Name.” How you choose to name programs is up to you - however as a Best Practice, we strongly suggest keeping a consistent naming convention. For example, if you’ve chosen to use the abbreviation for a degree after the title - ensure that you are consistently using either “BA” or “B.A.” rather than a mix of the two. The Program Name field has a maximum of 255 characters allowed, and no formatting is permitted.

The screenshot shows the 'Create a New Program' form. It has several fields: 'Program Name' (required) with the value 'Accounting, B.B.A.', 'Code' (optional) with a placeholder text '[Use this field to help identify this program in the Publisher. This information is not displayed on the Gateway.]', 'Degree Type' (optional) with the value 'Bachelor of Business Administration', 'Program Type' (optional) with the value 'Undergraduate Major', and 'Create Under' (required) with the value 'Department: Accounting, Economics, Finance'. There is also a note: '[Items whose parent is inactive will (also) be hidden from display on the Gateway.]'

The code field is optional and may be used to help you search for Programs in the Publisher or to help differentiate between similarly named programs. The code is **not** visible on the Gateway.

The Degree Type and Program Type fields are both optional but highly recommended. These fields are used to assign the Item Types to the program from the respective categories, to enable the sorting options found in filters.

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The “Create Under” drop-down menu indicates the Hierarchy ownership of the program and is a required field. The items in this menu will match the items entered in your Hierarchy Module.

There is a full WYSIWYG Editor available for the Description field. The description field is optional and will appear at the top of the program if you choose to enter any text here.

Following the Description field, you will be able to select the active status for the new program. Programs have three different status options:

- **Active and visible** - if this option is chosen, the program will be visible on the Gateway, may appear within filters or search results, and may be PermaLinked to.
- **Active and hidden** - if this option is chosen, the program will not be viewable within the filters, but it will still be available in search results and may be PermaLinked to.
- **Inactive and hidden** - if this option is chosen, the program will not be viewable or accessible from anywhere within the Gateway and any existing PermaLink references to it will display as plain text.

After choosing the active status, click “Save.” Once the program is created/saved, you will be taken to the “Summary” tab for the program, which will provide a review of the name, code, ownership, types, active-status, creation and last modified dates, and the user who has performed those actions.

<b>Program Name:</b>	Accounting, B.B.A.
<b>Program Code:</b>	
<b>Created Under:</b>	acalog University » College of Business & Technology » Accounting, Economics, Finance
<b>Degree Type:</b>	Bachelor of Business Administration
<b>Program Type:</b>	Undergraduate Major
<b>Active:</b>	Active-Visible
<b>Creation Date:</b>	09/02/2020 11:19:14 by Mara Sansolo
<b>Last Modified:</b>	09/02/2020 11:19:14 by Mara Sansolo

To edit any of the information on the previous screen, you can click the “Edit”

tab to adjust any of the content. To continue building out the program by adding in the requirements, navigate to the “Cores” tab.

## Managing Cores

Cores are the basic building block from which programs are created. Cores are used to group sets of course requirements and may include sub-cores to create levels within the sets of requirements - essentially creating an outline of the program.

Click the “Add a new core” link to create a new core.

First, enter the “Core Name.” This is a required field with a maximum of 255 characters, and no formatting allowed. This information will appear on the Gateway as the core heading. Core heading sizes will be determined by the level of the core as set in the “Cores” tab of the program.

When you first create a new core, you will see the “Create Under” drop-down menu. If this is the first core you’ve created in the

<b>Core Name: *</b>
<input type="text" value="First Year Requirements"/>
<b>Create Under: *</b>
[Select the program or a core as the parent for this core.]
Program: Accounting, B.B.A.
<b>Code:</b>
[Use this field to help identify this core in the Publisher. This
<input type="text"/>

Rev. [11/2020]

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program, the only option in this menu will be the program itself, making this a first-level core. As you add cores to the program, they will be added to this drop-down menu. If another core is selected from this drop-down menu, the core will be created as a sub-core. This option will not be available when editing existing cores; once cores have been created, they can re-ordered and re-parented in the main “Cores” tab.

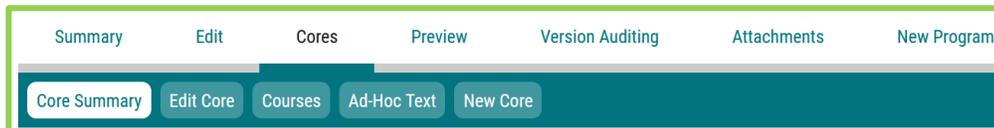
The code field is optional and will never be seen on the Gateway, just like the code field for the Program. There is a full WYSIWYG Editor available for a core description if additional context is needed. Not all cores need to have descriptive text - some institutions may choose to use cores to place the total number of hours under a lengthy set of requirements and no other details.

“Core active?” will be checked by default but can be de-selected if you would like to hide this section of requirements from the Gateway.

Once you’ve entered all of the relevant details for the core, click “Save” at the bottom of the page to be directed to the summary, where you can review the name, active status, creation and last modified dates, and the name of the user who last performed those actions.

**Core Name:** First Year Requirements  
**Core Code:**  
**Active:** Active-Visible  
**Creation Date:** 09/02/2020 11:21:22 by Mara Sansolo  
**Last Modified:** 09/02/2020 11:21:22 by Mara Sansolo

From the summary, you’ll notice that there are now two rows of tabs available. The top row relates to the program, and the second row relates to the core. The item in each row that is highlighted a different color will reflect your current location.



If you need to make any changes to the content you’ve just added, you can click the tab titled “Edit Core” to return to the previous page.

To begin adding courses to the core, click the “Courses Tab.”

### Add/Remove Courses

**Note:** You must have at least one core within a program in order to attach courses.

Within cores, you may begin dynamically attaching courses to display within your programs. These dynamically linked courses are not the same as a PermaLink - this is a unique type of link used within the programs only.

**Note:** As it is not a PermaLink, courses that have been dynamically attached will not be able to be located through the PermaLinks Usage Module, they may be deleted even if they are used within programs, and they are limited to being used once per each core.

After selecting a core, navigate to the “Courses” sub-tab within the second row of tabs.



The first table on the page will list any courses that are added to the core. Adding courses is done using the course filter just below this table to search and choose courses from the results.

To add courses, use the filter to locate the specific courses you would like to add. There are four options that you can use to help narrow down the results for filters:

- **Prefix** - Selecting only the prefix column will provide a list of every course that matches the selected prefix from the drop-down menu.
- **Code or Number** - Using only the Code or Number field will allow you to enter a numerical value and return a list of all courses sharing that value in the code/number field regardless of the prefix associated.
- **Type** - Selecting only the type column will provide a list of every course that matches the selected type from the drop-down menu. The types listed are determined within the [Item Types Module](#) and must be assigned to courses in order to return any results.
- **Keyword or Phrase** - Using the keyword or phrase field will allow you to search of ra specific keyword and return a list of courses sharing that value.

You may also combine fields to narrow results further; however, if results are too specific you may not see any items returned.



For example, if searching for the prefix “ACCT” and entering no other value, you will see two pages of results returned.

If you were to add the additional filter of Type and select “Accounting” you would see the exact same results, as the courses with the ACCT prefix all also have the Accounting type assigned to them.

If you were to select another type, such as “English,” then the search would return zero results - because there are no courses in the database that have a prefix of “ACCT” AND a type of “English.”

**Note:** When searching for courses using the Code or Number field, you may also use the asterisk (\*) as a wildcard. For example, you can enter “10\*” to receive results for courses who have a value that begin with “10.”

**Course Filter**

Search for courses using course prefix, course code, keywords or any combination.

Prefix:  Code or Number:  Type:  Keyword or Phrase:

Sort results:  Alphabetically  By Rank  Find whole word or phrase only.

[Select Courses to Add](#)

Course Name	Preview	Add
ACCT 221 - Principles of Accounting I	<a href="#">Preview</a>	<input type="checkbox"/>
ACCT 222 - Principles of Accounting II	<a href="#">Preview</a>	<input type="checkbox"/>
ACCT 311 - Managerial Accounting	<a href="#">Preview</a>	<input type="checkbox"/>

When the list of search results is visible, the courses will be listed in alphanumeric order. The preview column will provide a link that will launch a pop-up window for you to review the contents of the course. The “Add” column provides a checkbox for each course - select the box next to each course you would like to add and then click “add selected” at the bottom. If you have results that span multiple pages, you can check the boxes for the courses on different pages, and then click “Add Selected” to add all of them at the same time.

Once you’ve added them, they will appear within the table at the top of the page in the order you’ve added them.

**Note:** If you have added a course that has an active status currently set to “Inactive-Hidden”, the course will still be listed within the table in the appropriate location but will have the text “[Inactive-Hidden]” to the right of the courses name. This course will **not** display within the program as long as it is inactive, but if you later change the status back to active, it will then display within the program as expected.

If you need to adjust this ordering, you may use the drag-and-drop functionality to reorder your courses. Each course will have an icon  next to it to indicate that it can be moved up or down within this list.

**Course Filter**

Search for courses using course prefix, course code, k

Prefix:  Code or Number:

Sort results:  Alphabetically  By Rank

[Select Courses to Add](#)

Course Name
AG 100 - Introduction to Agriculture
ASTR 101 - Astronomy of Solar System
ASTR 102 - Introduction to Stars and the Universe
BSC 101 - Plant Biology

**Courses**

AG 100 - Introduction to Agriculture
ASTR 101 - Astronomy of Solar System
ASTR 102 - Introduction to Stars and the Universe



To reorder them, left click on the item when hovering over it and your cursor has transformed into the four arrows icon , left-click and hold while you drag the item to the new location. After you release, be sure to click “Save Ordering.”

If a course needs to be removed, you can select the course in the “Remove” column by checking the box within the same row and clicking “Remove Selected.” This will only remove the course from this program, not from the database.

**Note:** *If a course is deleted from the database, it will automatically be removed from programs as well.*

If you would like to preview how this program would now appear, you may use the Preview Tab within the first row of tabs to launch the Publisher Preview to see how the core will appear within the program.

## First Year Requirements

- AG 100 - Introduction to Agriculture Hours: One
- ASTR 101 - Astronomy of Solar System Hours: Four
- ASTR 102 - Introduction to Stars and the Universe Hours: Four

### Sub-Cores

Programs can contain any number of cores needed to outline your specific requirements. In addition to the cores that are placed at the first-level, you can also create sub-cores within them to provide additional levels of requirements.

For example, if our first-level core were titled “First Year Requirements,” we might also find a “First Semester” and a “Second Semester” listed within, and each of those headings may have additional course requirements. To allow the additional content, and to illustrate that they fall under the umbrella of the “First Year Requirements,” you can use a sub-core to add them with a slightly smaller heading and indented under the first-level. You can continue to add third, fourth, etc. level cores as needed.

To create a sub-score, follow the same steps outlined in the [Managing Cores section](#). During the creation process, you can use the “Create Under” field to designate which first-level core to parent the sub-core under by selecting it from the drop-down menu. If you have multiple cores, you can also parent it beneath an existing sub-core.

**Core Name: \***

**Create Under: \***  
[Select the program or a core as the parent for this core.]

If a core already exists and needs to be modified from a first-level core to a sub-core; or if you need to change the current ownership or ordering of any existing sub-core, see the section for [Re-ordering and Re-Parenting Cores](#).



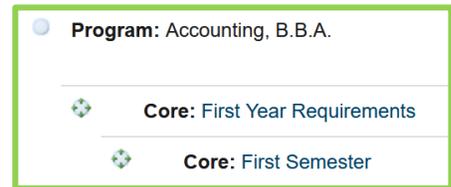
## Re-ordering and Re-parenting Cores

Cores can be reordered or reparented within in a program using drag-and-drop functionality as needed. To change the ordering or ownership, navigate to the Cores Tab within any program. From this tab, you will see a table displaying all existing cores.

Within this table, the first column will be “Core Name,” and will list the program first as an uneditable item at the very top level. The program will not be able to reordered or reparented - much like the institution within the hierarchy module.

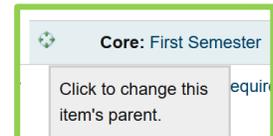
Core Name	Status	Remove/Delete
Program: Accounting, B.B.A.	Active-Visible	<a href="#">Remove/Delete All</a>
Core: First Year Requirements	Active	<a href="#">Delete</a>
Core: First Semester	Active	<a href="#">Delete</a>
Core: Second Year Requirements	Active	<a href="#">Delete</a>

Below it, at the first level of indention, you will find all first-level cores. They will have an icon  next to them displaying arrows in all four directions indicating that the core may be reparented or reordered. If there are any existing sub-cores, they will appear indented again beneath the respective first-level or sub-core.

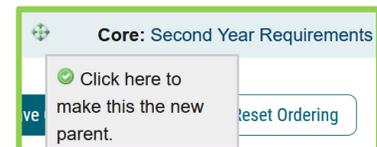


You can reorder cores that exist at the same level. This means that you may change the order of all of the first-level cores by using the drag-and-drop functionality to rearrange them; noting that any associated sub-cores will be moved with them. When reordering a sub-core, you will only be able to reorder it within its current ownership.

To change the ownership of a core, click the circle icon  to the left of the core name. You will see a small tooltip appear that says, “click to change this item’s parent.” Once selected, the tooltip will change, telling you to select a new parent.



Next, hover over the icon to the left of the core that should be the new parent and a new tooltip will appear, indicating for you to click the icon to change the parent.



After re-ordering or re-parenting any cores within your program, click the “Save Ordering” button. After choosing to save the changes, the cores display will collapse and reveal a pending bar while the changes are saved. You will not be able to modify the cores or courses again until this process is complete.

## Removing Cores

If you decide that a core needs to be removed from the program, you can use the “Remove/Delete” column.

If you choose the “Remove/Delete All” option that appears to the right of the program, you will remove **all** cores and courses information within this program. This is a permanent action that cannot be undone.



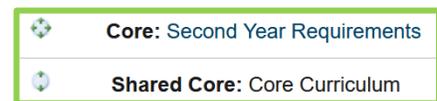
If you choose to remove a single core, you may choose the “Delete” link to the right of any core to remove it. If there are any sub-cores owned by the core you choose to delete, the sub-cores would also be deleted at that time. If you need to keep the sub-cores, you would need to reparent them prior to deleting the core that owns them.

## SHARED CORES

The purpose of a shared core is to eliminate redundancy. It is not uncommon for institutions to have a collection of courses that everyone who attends the institution must complete [e.g., Gen. Ed. Requirements]. The same is often true for departments - sometimes a department may require that every program they own must take the same set of initial courses. These would be great scenarios for Shared Cores to be used effectively.

Once a Shared Core is created, it can be attached to any number of programs in the catalog. Whenever the requirements need to be updated, the changes will be made in the single Shared Core and those changes will then be reflected in all programs the Shared Core is attached to.

Shared Cores are built and maintained exclusively in the Shared Cores tab of the Programs & Cores Module and are **not** modified within an individual program. When viewed within a program, the Shared Core will appear as a non-clickable link.



### Create a Shared Core

To create a new Shared Core, you will need to navigate to the top of the page and select the Shared Cores Tab from within the Programs & Cores Module.

Here you will be able to see the search, an alphabetical list, the “Add a new shared core” link, and the list of all currently existing shared cores.

The table of shared cores will list ten shared cores at a time, in alphanumeric order. If you select a letter or the pound symbol from the alphabetical list, the shared cores will sort and list the shared cores beginning with that selection.

Within the table are four columns. The first is “Shared Core Name” This will indicate the name of the shared core, as it would display within the program. The second column is “Code”, which can be used to give a hidden code to shared cores to help tell them apart. This is especially helpful when the shared cores may have similar titles, or if you are also using Curriculumlog. The next column is “Status” which will indicate the active-status of the shared core, and the last column, “Usage”, will indicate how many programs are currently using a specific shared core.

**Note:** Shared Cores are built and maintained entirely separate from the programs they may be attached to, and cannot be converted into a core, nor can a core be converted into a shared core.



### Enterprise Edition Specific Feature

When you view an aliased catalog from within an organization, the shared core listing will show two “Status” columns. The “SL Status” column shows the system-level status of the shared core and the “OL Status” column shows the organization level status of the shared core. The “OL Status” will affect the shared core’s ability to be viewed on the Gateway while the “SL Status” is informational only. Shared cores created at the organization level will not have a system-level status.

Next, click the “Add a new shared core” link to be taken to the “New Shared Core” page. Creating a new shared core will follow steps similar to establishing a core within a program.

The first field will be “Shared Core Name” and will be required. This will be the title of the shared core and will display as the first level core within the program it is attached to. This field will allow up to 255 characters and does not permit any formatting.

The “Code” field allows you to enter a custom code to help identify the shared core. This information is never displayed on the Gateway but can be very helpful within the publisher. Many institutions have shared cores with similar names - for example, several departments may have a shared core titled “General Requirements” and need to use the code fields to distinguish them with the various department names. The code field will also be helpful if you will be using Curriculog to manage shared core content; as the import preview will only display the name and code fields. This field will allow up to 255 characters and does not permit any formatting.

The “Description” field is an optional field where you can use the WYSIWYG editor to enter any relevant content. You may enter an unlimited amount of content and use the editor to format the content as needed. The content entered here will display above any attached courses.

The “Shared core active” checkbox will be selected by default, and when checked, indicates that the shared core will display when it is attached to a program.

**Note:** A shared core does not stand alone on the Gateway. In order for a shared core to be viewed from the Gateway, it must be attached to an active-visible program.

The last option will be to save the shared core, which will then direct you to the Summary tab. The Summary tab will allow you to review the name, code, active status, creation date and last modified date and the user who performed those actions.

Shared Core Name:	Core Curriculum
Shared Core Code:	MUS
Active:	Active-Visible
Creation Date:	09/12/2013 12:58:47 by Digital Architecture
Last Modified:	06/10/2016 10:07:32 by Digital Architecture

If any of these elements need to be modified, you can click the Edit Tab to return to the previous screen.

### Add/Remove Courses

Once you have created the shared core, you can begin dynamically attaching courses.

**Note:** As it is not a PermaLink, courses that have been dynamically attached will not be able to be located through the PermaLinks Usage Module, they may be deleted even if they are used within programs, and they are limited to being used once per each core.

Rev. [11/2020]

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To add courses, navigate to the “Courses” tab.

The first table on the page will list any courses that are added to the core. Adding courses is done using the course filter just below this table to search and choose courses from the results - exactly as it is done when building a core within a program.

To add courses, use the filter to locate the specific courses you would like to add. There are four options that you can use to help narrow down the results for filters:

- **Prefix** - Selecting only the prefix column will provide a list of every course that matches the selected prefix from the drop-down menu.
- **Code or Number** - Using only the Code or Number field will allow you to enter a numerical value and return a list of all courses sharing that value in the code/number field regardless of the prefix associated.
- **Type** - Selecting only the type column will provide a list of every course that matches the selected type from the drop-down menu. The types listed are determined within the [Item Types Module](#) and must be assigned to courses in order to return any results.
- **Keyword or Phrase** - Using the keyword or phrase field will allow you to search for a specific keyword and return a list of courses sharing that value.

You may also combine fields to narrow results further; however, if results are too specific you may not see any items returned.

**Note:** When searching for courses using the Code or Number field, you may also use the asterisk (\*) as a wildcard. For example, you can enter “10\*” to receive results for courses who have a value that begin with “10.”

When the list of search results is visible, the courses will be listed in alphanumeric order. The preview column will provide a link that will launch a pop-up window for you to review the contents of the course. The “Add” column provides a checkbox for each course - select the box next to each course you would like to add and then click “add selected” at the bottom. If you have results that span multiple pages, you can check the boxes for the courses on different pages, and then click “Add Selected” to add all of them at the same time.

Once you’ve added them, they will appear within the table at the top of the page in the order you’ve added them.

Rev. [11/2020]

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**Note:** If you have added a course that has an active status currently set to “Inactive-Hidden,” the course will still be listed within the table in the appropriate location but will have the text “[Inactive-Hidden]” to the right of the courses name. This course will **not** display within the shared core as long as it is inactive, but if you later change the status back to active, it will then display within the shared core as expected.

If you need to adjust this ordering, you may use the drag-and-drop functionality to reorder your courses. Each course will have an icon  next to it to indicate that it can be moved up or down within this list.

To reorder them, left click on the item when hovering over it and your cursor has transformed into the four arrows icon , left-click and hold while you drag the item to the new location. After you release, be sure to click “Save Ordering.”

Courses
<input type="button" value="Save Ordering"/> <input type="button" value="Cancel and Reset Ordering"/>
 AG 100 - Introduction to Agriculture [Inactive-Hidden]
 ASTR 101 - Astronomy of Solar System
 ASTR 102 - Introduction to Stars and the Universe
<input type="button" value="Save Ordering"/> <input type="button" value="Cancel and Reset Ordering"/>

If a course needs to be removed, you can select the course in the “Remove” column by checking the box within the same row and clicking “Remove Selected.” This will only remove the course from this program, not from the database.

**Note:** If a course is deleted from the database, it will automatically be removed from shared cores as well.

If you would like to preview how this shared core would now appear, you may use the Preview Tab at the top of the page to launch the Publisher Preview to see how it would appear.

**Note:** When previewing a shared core, you will see the text “[IMPORTANT: This page is for preview purposes only. On the Gateway shared cores will only be displayed within the context of a program.]” at the top of the page unless you are viewing it from a program.

## Sub-Cores

Shared cores can contain any number of sub-cores needed to outline your specific requirements - but no additional first level cores.

For example, if our first-level core were titled “General Requirements,” we might also find an “Electives” listed within, and each of those headings may have additional course requirements. To allow the additional content, and to illustrate that they fall under the umbrella of the “General Requirements”, you can use a sub-core to add them with a slightly smaller heading and indented under the first-level. You can continue to add third, fourth, etc. level cores as needed.

To create a sub-score, follow the same steps outlined in the [Add/Remove Cores section](#). During the creation process, you can use the “Create Under” field to designate whether the new sub-core will be placed under the first-level core or under any existing sub-cores by selecting it from the drop-down menu.

<b>Sub-Core Name: *</b> Electives
<b>Create Under: *</b> [Select the shared core or a sub-core as the parent for this sub-core.] Shared Core: Core Curriculum



If a core already exists and you need to change the current ownership or ordering of any existing sub-core, see the section for [Re-ordering and Re-Parenting Sub-Cores](#).

Before saving a sub-core, note that the “Sub-core active?” checkbox is **not** checked by default. This checkbox behaves in the reverse of all previous status options - so you’ll need to be sure to check this option if you would like your sub-cores to display.

### Re-ordering and Re-parenting Sub-Cores

Sub-cores can be reordered or reparented within in a shared core using drag-and-drop functionality as needed. To change the ordering or ownership, navigate to the Sub-Cores Tab within the shared core. From this tab, you will see a table displaying all existing cores.

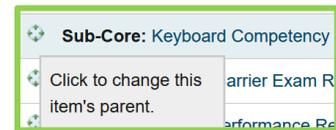
Within this table, the first column will be “Core Name,” and will list the Shared core first as an uneditable item at the very top level. The shared core will not be able to be reordered or reparented.

Core Name	Status	Delete
Shared Core: Core Curriculum	Active	<a href="#">Delete All</a>
Sub-Core: Music requirements (43 sh)	Active	<a href="#">Delete</a>

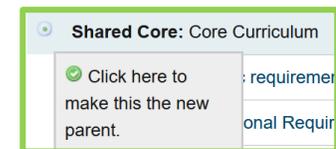
Below it, you will find all sub-cores. They will have an icon  next to them displaying arrows in all four directions indicating that the sub-core may be reparented or reordered.

You can reorder sub-cores that exist at the same level. When reordering a sub-core, you will only be able to reorder it within its current ownership.

To change the ownership of a sub-core, click the circle icon  to the left of the core name. You will see a small tooltip appear that says, “click to change this item’s parent.” Once selected, the tooltip will change, telling you to select a new parent.



Next, hover over the icon to the left of the sub-core that should be the new parent and a new tooltip will appear, indicating for you to click the icon to change the parent.



After re-ordering or re-parenting any sub-cores within your shared core, click the “Save Ordering” button. After choosing to save the changes, the cores display will collapse and reveal a pending bar while the changes are saved. You will not be able to modify the shared core until this process is complete.

### Removing Sub-Cores

If you decide that a sub-core needs to be removed from the shared core, you can use the “Delete” column.

If you choose the “Delete All” option that appears to the right of the shared core, you will remove **all** sub-cores and courses information within this program. This is a permanent action that cannot be undone.

If you choose to remove a single sub-core, you may choose the “Delete” link to the right of any sub-core to remove it. If there are any sub-cores owned by the sub-core you choose to delete, the sub-cores would also be

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deleted at that time. If you need to keep the sub-cores, you would need to reparent them prior to deleting the sub-core that owns them.

### Shared Core Usage

The “Usage” column will show you how many programs a shared core is currently attached to. If you were to make a change, or remove the shared core, the change would impact each of the associated programs immediately - so it is important to know what programs are currently making use of the shared content.

Usage
<a href="#">2 Programs</a>
<a href="#">1 Program</a>

To see the list of programs, click the link within the Usage column and a pop-up window will display all the programs that the shared core is attached to, so you can quickly see which programs will be impacted by the change. Each program will be a clickable link that will direct you to that specific program.

### Shared Core Usage

The shared core **Core Curriculum** is currently being used in the following programs.

Click on a program name below to close this window and immediately edit the program.

Program Name	Status
<a href="#">Accounting, B.B.A.</a>	Active-Visible

### Attach a Shared Core to a Program

To attach a shared core to a program, select the program you would like to attach it to, then navigate to the “Cores” tab. Below the cores, you will see the “Add a Shared Core” drop-down menu.

Shared cores will be listed by their titles, and if codes are used, the codes will appear in brackets to the right of them to help identify them. Choose a shared core and click “Add.” The shared core will be added to the bottom of the program by default. You may re-order the shared core within the program just as you re-order a standard core.

**Add a Shared Core:**  
[Shared Cores are maintained within the Shared Cores tab at the top of the page]

Select a Shared Core ...

Select a Shared Core ...

Core Curriculum [ART]

Core Curriculum [MUS]

**Note:** Shared Cores will always appear as first-level cores and cannot be modified from within a specific program. Moving a Shared Core will always move its sub-cores with it.

### AD-HOC TEXT

Ad-Hoc text can be used to add additional textual requirements within a list of courses. The most common example of ad-hoc text in a program is when telling a student to choose between multiple courses using the word “or” - but it is also often used to add blank spaces to break up groups of courses or adding electives.

Before you can add any ad-hoc text, you will need to have at least one course listed in the core. To add the ad-hoc text, you can select one of two options: you can either select the Ad-Hoc Text Tab from the top of the page, or you can scroll all the way to the bottom of the page to the section titled “Insert Ad-Hoc Text.” (Clicking the tab takes you to the same place!)





The “Ad-Hoc Text Name” field does not display on the Gateway. This is a required field and is used to help you identify the ad-hoc within the publisher. The field is limited to 100 characters and does not permit any formatting. It is common to use the same text that will display on the Gateway - for example, “Or,” but you don’t necessarily have to.

The “Associated Course” is a required field and identifies the course that the ad-hoc Text is attached to. This will list all courses that are currently attached, and you can select multiple courses at a time if you hold CTRL while clicking.

Next is “Placement” which is where the ad-hoc will appear in relation to the associated course. It may appear Before (on the line above), Left, Right, or After (on the line below).

The “Optional Information/Description” section is where you enter the information that should appear on the Gateway. Use the tools of the editor add any desired formatting - whatever is entered in the editor, and how it is formatted, will determine exactly how it will appear on the Gateway. For example, you may choose to enter the word “OR” and bold it - or you may choose to leave the field entirely blank, causing a blank space to appear on the Gateway, spacing out the courses.

Last is the “Credits/Units” field. This optional field allows you to enter a value that will display next to the course, based on the selected placement. The text “Credits/Units” cannot be changed.

• [MATH 453 - Essentials of Statistics](#)  
Credits / Units: 3

After all selections have been made, click “Add Now” to save the ad-hoc. Once the ad-hoc has been saved, you will see it appear within the list of courses, just below the course it is associated with. The ad-hoc will display as a clickable link, but it will not be able to be reordered through the drag and drop functionality.

• [PSY 302 - Psychological Statistics: Descriptive and Inferential](#)  
[or](#) [Placement: After]

To change the associated course, you would need to click on the ad-hoc text, then modify it directly, and save the changes.

When viewing your program from the Gateway, you’ll see the ad-hoc text appearing as indicated.

• [PSY 302 - Psychological Statistics: Descriptive and Inferential](#) Hours: Four  
OR  
• [BSC 412 - Quantitative Biology](#) Hours: Three

To remove an ad-hoc, you can check the box in the remove column, and click remove selected.

## Courses Module

Courses are the foundation of the catalog. There are more courses within your academic catalog than anything else. As Acalog functions as a relational database, a course record will be created only **one** time - but after creation, a course can be referenced by an infinite number of programs, or be referenced any number of times throughout the catalog in the form of a PermaLink. No matter how many places a given course may be found, there's only once instance of it within the database, and it is located within the Courses Module.

When you first navigate to the Courses Module, you will arrive on the “Courses” tab. This is where you can create, edit, and delete courses. The structure of the courses will be determined in the “Courses Template” tab, accessible only by a catalog manager.

**Note:** If Custom Permissions are enabled, non-manager level users may have even fewer permissions and they will be designated by two icons:

 - Indicates permission to edit the selected item has been granted.

 - Indicates permission to edit the item has been revoked. The Edit Tab will not be available.

### Enterprise Edition Specific Feature

When viewing the courses, you'll find that each item has an additional icon appearing next to it. Hovering over the icon will provide a tooltip identifying its purpose.

 - Indicates that content is housed at the System Level and cannot be modified within an Organization but may appear within several aliased catalogs.

 - Indicates that content is housed within an Organization. The content is not shared across multiple catalogs and may be edited at this level.



## MANAGE COURSES

When you first access the Courses Tab of the Courses Module, you will be on the “Manage Courses” page. At the top of the page, you will find a course filter which can be used to help locate any existing courses within the publisher.

To use the filter, you can select an option from the prefix drop-down, enter a code, select a type from the drop-down option, or enter a keyword - or even leave all options blank - and click “Filter.” The search will return all relevant results, listing ten per page in alphanumeric order.

When viewing these results, the first column will indicate the Course Name. The Course Name is dictated by the Course Template, but usually consists of the prefix, code, and name of the course. Next to the name will be a preview link, which will open a pop-up window for you to review the current contents of that course.

Course Name	Course Type	Status	FlashPoint™ Link
<a href="#">ACCT 221 - Principles of Accounting I [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 222 - Principles of Accounting II [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 311 - Managerial Accounting [Preview]</a>	Accounting	Active-Visible	Active <a href="#">[Edit]</a>   <a href="#">[Preview]</a>
<a href="#">ACCT 321 - Intermediate Accounting I [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 322 - Intermediate Accounting II [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 326 - Microcomputer Applications in Accounting [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 421 - Advanced Accounting [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 427 - Auditing [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 430 - Business Ethics for Accountants [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>
<a href="#">ACCT 431 - Internship in Accounting [Preview]</a>	Accounting	Active-Visible	None <a href="#">[New Link]</a>

Page: 1 2 3 4 5 6 7 8 9 10 11 ... Forward 10 -> 115

The next column will be “Course Type,” which will indicate the item type currently assigned to that course.

The “Status” column will indicate the active status of the course. Courses may be either active-visible, meaning they will show on the Gateway; or they can be inactive-hidden.

The last column will indicate if there are any FlashPoint Links associated with the course. FlashPoint Links will be covered in more detail within the FlashPoint Links Module.

### Enterprise Edition Specific Feature

When you view an aliased catalog from within an organization, the course listing will show two “Status” columns. The “SL Status” column shows the system-level status of the course and the “OL Status” column shows the organization level status of the course. The “OL Status” will affect the course’s ability to be viewed on the Gateway while the “SL Status” is informational only. Courses created at the organization level will not have a system-level status.



## Create a New Course

Courses can be created on a one-by-one basis, or they can be uploaded in batches. To create a single course, click the “Add a new course” link. To import a large batch of courses, see the [Courses Import Module](#).

As you begin filling in the fields to create a new course, be sure to fill in all required fields labeled in red. Each institution will have a different form available, as the fields presented here are determined by the [Course Template](#).

- Fields with an asterisk will be required.
- Fields without an asterisk will be optional.
- Fields presented with a WYSIWYG will be the only fields that will permit any formatting.

At the bottom of the page, you will see the “Create Under” drop-down menu field. This is where you will choose the Hierarchy entity that owns this course. You may also choose a Course Type, which will give you a drop-down list of items created within your Item Types module. Check the box next to “Course Active?” so that the course is visible on the Gateway.

**Create Under: \***  
[Items whose parent is inactive will (also) be hidden from display on the Gateway.]  
Select a Hierarchy Item ...

**Course Type: \***  
Select a Course Type ...

## Edit course

From the Manage Courses page, use the Course Filter to locate a course for editing. (Example: Use the Prefix drop-down menu to search by a selected Prefix.) Once courses are available to choose from, click on a course link (the course name) to open information specific to that course. Choose the Edit Tab to make changes to this content.

## Delete course

If you need to delete a course, you will need to navigate to the Edit Tab for that course and at the bottom of the page, you will have the check box to “Delete this course?”

**Delete this course?** [Delete all data and remove this course from any areas to which it has been attached.]

This course cannot be deleted until all PermaLink references to it are first removed from other items in this catalog. Referenced items for this course can be obtained in the PermaLink Usage module.

When you check that box, you will be prompted if you are sure you want to delete this course. Once you click “OK,” you may now select the “Delete!” button at the bottom of the page to delete the course. Deleting this course is a permanent action and will take effect immediately and will remove it from any Program or Filter that it is attached. This will include the course’s attachments and Version Auditing history.

If you have PermaLinks to a course, you will not be able to delete it until you first remove all PermaLink references. To locate any existing PermaLink references, you can use the [PermaLink Usage Module](#).

## Attachments

One of the Tabs available while you are working in a course is the “Attachments” Tab. Here you can administratively attach documents to your course information. Your attachments will **not** appear on the Gateway;

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they are for Publisher use only. You may want to think of the attachments as a digital file cabinet - a place to store things like, a change-approval request, or a petition for removal directly with the course itself.

Click on the browse button to add a file from your computer. It can be any file type, but the file size cannot exceed 25MB. You then have the option of locking your attachment. If you lock the attachment, then only you or Manager level accounts can delete it. Then, click “Upload Attachment.”

Once the file has been uploaded you will see it appear in the Attachments Table at the bottom of the screen. You will see the filename, the file size, the date it was uploaded, who it was uploaded by and whether that file is locked.

Filename	Filesize	Upload Date	Uploaded By	Lock	Delete
 College President.jpg	38.23KB	09/02/2020 14:14:49	Mara Sansolo	<a href="#">Unlock</a> 	<a href="#">Delete</a>

View the [attachment log](#) to see a history of attachment events for this course.

If there is not an option to delete this file, it is because it has been locked. To delete the attachment, you will need to first select “Unlock.” A pop-up window will notify you that if the file is unlocked any user may delete it. Once you confirm, you will have the ability to delete this attachment.

Below the Attachments Table, there is a link to view the “attachment log.” This will display the history of the attachments that have been added to this course. It will indicate what was uploaded, who uploaded it, when it was unlocked and even when it was deleted and by who.

## COURSES TEMPLATE

**Note:** If your Acalog system has Integration Manager enabled, for example, if you are also using Curriculog and can import proposal information, you will see a warning when you navigate to this page. If you modify your courses template, any existing maps to this catalog will become invalid and need to be recreated. This will also affect existing tasks and legends. This warning will appear for every catalog; even if you are working in a catalog that does not have a map. If you are unsure if you should proceed, please contact our Client Care team first, [support@digarc.com](mailto:support@digarc.com).

### Enterprise Edition Specific Feature

If you are working with an Organization Level, in an aliased catalog from the System Level, you will only be able to modify the field ordering. The template will only be able to be modified at the System Level and will impact all aliased catalogs.



The Courses Template allows you to customize the layout of each Catalog's course data - different catalogs may have different Courses Templates. For example, you may want to include an honors field within your graduate catalog that does not exist within the undergraduate.

Field/Item Type	Field Type	Status	Required?
Prefix [System Default]	Small Text	Visible	Required
Space [Delete]	[Display]	Visible	N/A
Code [System Default]	Small Text	Visible	Required
:	Static Text	Visible	N/A
Name [System Default]	Small Text	Visible	Required
Course Title/Body Separator ⓘ			
Hours: [System Default]	Small Text	Visible	Optional

The Courses Template controls the individual Course Data Point fields, determining what fields will appear in the course form to enter data into, and how that data will display on the Gateway.

**Note:** All changes to the course template will be live and immediate for all courses in the selected catalog. It is recommended to make course template changes only to catalogs that are not yet published to the Gateway. If you do make a change to a published catalog, changes made to the title of the course may take several minutes to save as it will impact the immediate display. Changes made to the description of the course will save immediately, as the content will only display when the course is expanded.



Some fields may have “[System Default]” to the right of the field name. This indicates that the field was generated by Acalog when the catalog was initially created, as most courses found within institutions typically contain these fields. With a few exceptions, you can modify or remove these defaults if they do not fit your course structure.

The Prefix, Code, and Name fields are used for searching and are limited in what can be modified, and they cannot be deleted. The only options available for these fields will be the way that it appears - for example, if it should be in bold, if it should show in the Degree Planner, or if Non-Managers will be able to modify it.

**Note:** Only Manager level accounts will have access to the Courses Template.

## Field Type

Each field in the template will have a “Field Type” listed to the right. The field type will determine what type of data will be able to be entered in a given field for each individual course. The available field types are:

- **Static Text** - This field may contain up to 255 characters of unformatted text. Text entered into this field will display within all courses and is used to display a consistent element across the database. For example, if all courses should be formatted to read “Prefix Code - Name” then the hyphen would be created as static text. Once created, it would not need to be manually created within each course - the static text would automatically display between the Code and Name fields of every course. Another common example would be to place ( ) around credit hours.
- **Small Text** - This field may contain up to 255 characters of unformatted text. Common examples of Small Text may include Hours/Credits, When Offered, or Honors.

**Note:** Prefix and Code are unique fields in the system and are limited to only 20 characters.

- **Large Text** - This field will allow an unlimited amount of text to be entered but will not allow any formatting.
- **Rich Text** - This field allows for an unlimited amount of content to be entered and includes the WYSIWYG editor. As the editor is available, you will be able to format the content inclusive of PermaLinks as needed. Common examples of this may include the Pre-requisites field, which may include a PermaLink to the prerequisite course listed.
- **JSON Text** - JSON is a lightweight data-interchange format used for transferring data between systems. Acalog, Curriculog, and other third-party systems can utilize JSON to safely transfer data that might otherwise not transfer as expected. For example, a course field with a value of "spring, summer" might indicate one value ("spring, summer") or two values ("spring" and "summer"). This difference can be indicated by using JSON. Valid JSON data encloses each separate value within double quotes (") and the entire value within brackets ([ and ]). Values that contain quotes must have the quotes escaped with a backslash. This field is only used when integrating with another system and will be explained in further detail in the [JSON to the Rescue](#) section.
- **Display** - An item which can be added for display purposes, such as spacing or a horizontal line. Display items are placed directly into the template and are not editable.

**Note:** HTML is not permitted within any field and will be removed when the content is saved.



## Course Title/Body Separator

The “Course Title/Body Separator” controls what information will be used to establish the title of your courses, which will impact the way course links display on the Gateway. Any field placed above the “Course Title/Body Separator” is considered a part of the course title and will be used as the link text when courses are listed in filters and programs. For most institutions, this will be comprised of Prefix, Code, and Name.

Field/Item Type
<a href="#">Prefix</a> [System Default]
Space <a href="#">[Delete]</a>
<a href="#">Code</a> [System Default]
-
<a href="#">Name</a> [System Default]
Course Title/Body Separator <a href="#">!</a>

The course title will also appear as a heading when the course link is expanded to show the full course details. The fields below the “Course Title/Body Separator” are considered the course body/details; and this information will only be displayed when a course link is expanded.

**Note:** The course title will appear **exactly** as indicated in the Courses Template, including spacing, which means if there is no “Space” display item included in the course title, there will be no space in the course link when it displays on the Gateway.

## ENG 101 - College Reading and Writing

Hours: Three

English 101 introduces students to writing as an extended, complex, recursive process and prepares students for English 102, which more rigorously examines the forms and structures of argument and means to approaching multiple audiences. In 101 students will write weekly, and will work on essay organization and development. The course will emphasize close reading, summarizing, and analysis of expository texts, including student writing.

Prerequisites: ACCT 100

Note May only be taken once per program.

## Re-Ordering Fields

The fields of the Courses Template will display in the exact order that they appear within the table - but you are able to change the ordering consideration using the drag-and-drop functionality.

<a href="#">Code</a> [System Default]	Small Text
-	Static Text
<a href="#">Name</a> [System Default]	Small Text
Course Title/Body Separator <a href="#">!</a>	
<a href="#">Hours:</a> [System Default]	Small Text

Each field has an icon  to the left of it with arrows indicating that it may be dragged up or down within the list. If you hover over a field, you’ll notice that it highlights yellow and the cursor changes to the four arrows pointing outward icon . This indicates that you can move the item using the drag-and-drop functionality. The ordering that you see here will be directly reflected in your course descriptions. Any time a new item is added, it will display at the bottom of this template table and you have the option to reorder your items and customize the template to fit your needs. Remember to save your ordering with the button above or beneath the table when you are done making changes.

**Note:** If you reorder any items above the Course Title/Body Separator, changes may take several minutes to save as it will impact the immediate display of all courses on the Gateway. Changes made to fields below the separator will save immediately, as the content will only display when the course is expanded.



## Managing Course Fields

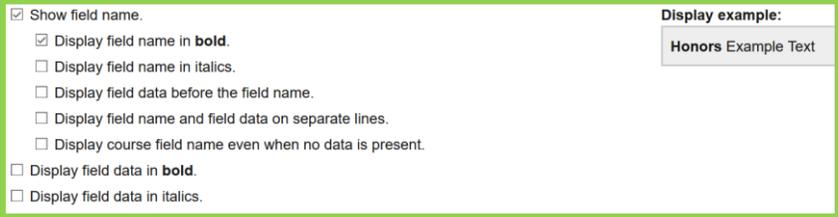
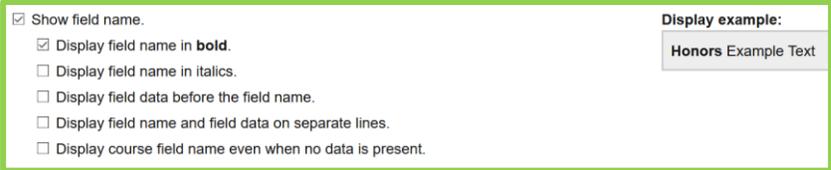
To add a new course field, click the red “Add a new course field” link.

The first field on the page will be “Course Field Name”, and this is a required field. This may display on the Gateway depending upon the display options you select. This field has a maximum of 255 characters and does not allow any formatting.

The next option is to indicate the type of field this will be - you can review the options under [Field Type](#) above. The field type will impact what options are available under “Field Name Display Options.”

“Field Name Display Options” is an optional field - this will determine if you would like the text entered in the “Course Field Name” field to display on the Gateway, and how.

- If you have chosen **Static Text** as the field type, you will have the option to display the text in bold, italics, or both. This will impact all courses.  

- If you have chosen **Small or Large Text** as the field type, you first have the option to determine if the field name will show on the Gateway at all. Then, you can choose if you would like to be displayed in bold, italics or both, placed before the data on the same line or placed on separate lines, or if you would like field name to show up even if there is no data in the field. There will also be options to place the data in bold, italics, or both as well.  

- If you have chosen **Rich Text** as the field type, you first have the option to determine if the field name will show on the Gateway at all. Then, you can choose if you would like to be displayed in bold, italics or both; placed before the data on the same line or placed on separate lines; or if you would like field name to show up even if there is no data in the field.  




- If you have chosen **JSON Text** as the field type, you first have the option to determine if the field name will show on the Gateway at all. Then, you can choose if you would like to be displayed in bold, italics or both, placed before the data on the same line or placed on separate lines, or if you would like field name to show up even if there is no data in the field. There will also be options to place the data in bold, italics, or both as well. The JSON Text course fields also include unique display options to allow their display in the Gateway as plain text or a numbered or bulleted list.

Show field name.

Display field name in **bold**.

Display field name in italics.

Display field data before the field name.

Display field name and field data on separate lines.

Display course field name even when no data is present.

Display field data in **bold**.

Display field data in italics.

Display field data as plain text.  Display field data as a numbered list.  Display field data as a bulleted list.

**Display example:**

**Honors Example,**  
Text

The next field, "Required," is used to indicate if the field is required or optional for the users who are creating or editing a course. If the field is set to required, users will not be able to leave the field blank when saving changes.

**Note:** *If you have existing courses, and you add a new field, or change an existing field to be required - edits to the existing courses will now require content to be added to the field to save.*

The next option is a checkbox titled "Field is visible?" If this option is selected, the contents of the field will be displayed on the Gateway. If left unchecked, the information will be hidden but will remain available within the Publisher. Hidden fields allow you a way to store information in your courses database that the public does not need access to - and it remains searchable, even allowing you to create a filter based on the search results.

Next, you can determine whether you would like the field to be displayed in the Degree Planner for programs. If enabled, the field information will appear below the course title within the degree planner. To learn more, see the [Degree Planner section](#).

Course Name
PSCI 211 - Principles of United States and Florida Government
PSCI 212 - United States and Florida Government: Institutions and Policies
<b>Note:</b> Due to differences in course content at different institutions, it is recommended that students complete requirement political science (government) at the same institution..

The next option you can check is to "Disallow editing of field values by non-managers." When this box is selected, this field will still appear when a non-manager edits a course and allow the user to see the data, but it will be grayed out and they will not be able to edit the contents of the field. Manager-level users will still be able to modify the contents of these fields.

Lastly, you can choose to delete an existing course field. If you delete a course field, all data contained in that field will be deleted from all courses and should be considered a permanent action.



## Program Display Field

The Program Display Field will allow you to take any Small Text field and display it to the right of courses displayed within a program. To enable this, scroll down to the bottom of the template to the “Select Program Display Field” drop-down menu.

Choose the desired field from the drop-down menu and then click “Select.” Once enabled, all courses dynamically linked within a program will display this content to the right. To remove, change the drop-down menu back to “Do not display any field.” Only one field can be displayed at a time.

Select Program Display Field:  
[Select one field to display after courses that are assigned to programs. ⓘ]  
Do not display any field.  
Select

- [ENG 100 - Introduction to College Reading and Writing Hours: Four](#)
- [ENG 102 - Written Argument and Research Hours: Three](#)
- [ENG 200 - Popular Literature and Culture Hours: Three](#)
- [ENG 201 - Introduction to Literature Hours: Three](#)

Once this has been enabled, you can also choose to display the field within a courses filter as well. For more information, see the section on [filters](#).

## Display Item

Below the course template table, you will see a drop-down menu for adding new display items. You may add a space above the Course Title/Body Separator and you can add a single line break, double line break, or horizontal rule below the Course Title/Body Separator. After making your selection from the drop-down menu, click “Add.”

The new items will default to the bottom of the list, and you can then use the drag-and-drop functionality to reorder them as needed. Be sure to click “Save Ordering” when finished.

Add New Display Item:  
[Select a display item to place in the courses template.]  
Space  
Space  
Course Title/Body Separator  
Single Line Break  
Double Line Break  
Horizontal Rule

## Courses Template Display Example

At the very bottom of the page is a preview displaying all fields in the current courses template. As you adjust the template, you can quickly preview the changes where even if you do not have course data in all the fields.

This preview will display with sample text only.

Courses Template Display Example:  
[This example will change based on field settings and ordering above. Note: actual course data may display differently due to rich text formatting.]  
Prefix Code - Name  
Hours: [Hours: - Example Text]  
[Description - Example Text]  
Prerequisites: [Prerequisites: - Example Text] Corequisites: [Corequisites: - Example Text]  
Note [Note - Example Text]  
Cross Listed/ Same As [Cross Listed/ Same As - Example Text]

## JSON TO THE RESCUE

**JSON** (JavaScript Object Notation) is a lightweight data-interchange format. It is easy for humans to read and write while also easy for machines to parse and generate. It is based on a subset of the JavaScript Programming Language, Standard ECMA-262 3rd Edition - December 1999.

For the purpose of this manual, the JSON text field will allow for fields that need to contain a value with multiple selections to be moved into and out of Acalog through Integration Manager when communicating with Curriculog. An example of this type of field might be “When Offered”, noting that a class may be offered during the “Spring,” “Summer,” “Fall,” or “Winter” semesters - providing four options in total.

Previously, Acalog would store information within Small Text fields with information such as:

Spring, Summer, Fall

**When Offered**

Warning: Changing this data may affect its validity in Curriculog or other systems that utilize it.

This information, related to when a course is being offered, is currently separated by commas. If you attempt to import this string into Curriculog in this format, it would be unable to separate the values. Instead of a single value for Spring, one for Summer, and one for Fall - it would read it as an entire string, Spring, Summer, Fall.

If your form in Curriculog is looking for the single values and is only being provided the single collective string, it would be unable to import as it cannot find a match.

This is where JSON steps in.

JSON is an industry standard that offers a way to identify this data as distinct values. JSON is still a string value you can edit, but it requires a special format to indicate the values as separate. Here are example values you might see for a field used to select semesters:

**When Offered**

Fall

Summer

Spring

Winter

- The JSON value ["spring, summer"] indicates one single choice of "spring, summer"
- The JSON value ["spring", "summer"] indicates two distinct choices of "spring" and "summer"
- The JSON value ["" ] indicates no selection

**When Offered** Spring, Summer, Fall

- o No matches were found
- o The following option could not be imported: Spring, Summer, Fall



Curriculog will allow import and export of JSON data. This means Smartfields and checkboxes can be correctly populated via import without manual editing.

In Acalog, the Courses Template JSON Text course field type allows only valid JSON values. This field type will be used for transfer of data to and from Curriculog. The JSON Text course fields include unique display options to allow their display in the Gateway as plain text or a list. **When editing a course, JSON Text type fields will require valid JSON formatting.**

### Convert Existing Data to JSON

Text fields can be easily converted into JSON format by using the course export and import feature.

First, generate a course export and remove any unnecessary fields - if you're not making other changes to your courses, you will only need to maintain the "Course OID" column and whichever fields you will be converting, such as the "When Offered" column seen here.

	A	B
1	Course OID	When Offered
2	261153	Fall, Spring, Summer
3	261154	Fall, Spring, Summer
4	261155	Fall, Spring, Summer
5	261156	Fall, Spring

Next, insert a blank column to the left of the column in need of converting. You may also need to insert two blank columns after the desired column if you have more fields in the file.

	A	B	C	D	E
1	Course OID		When Offered		
2	261153		Fall, Spring, Summer		
3	261154		Fall, Spring, Summer		
4	261155		Fall, Spring, Summer		

In the left column, enter "[ \" in the second cell (skip the header row) and copy into the entire column. In the first right column, enter "\"]" and copy into the entire column.

	A	B	C	D	E
1	Course OID		When Offered		
2	261153	["	Fall, Spring, Summer	"]	
3	261154	["	Fall, Spring, Summer	"]	

Next, quotes need to be placed around each value in the list. Highlight the desired column and open the find/replace tool using Ctrl+F and click the "Replace" tab.

	C	D	E
	When Offered		
	Fall, Spring, Summer	"]	
	Fall, Spring, Summer	"]	

Find and Replace ? X

Find  Replace

Find what:

Replace with:  Options >>

In the "Find what:" field, enter a comma and a space.

In the "Replace with:" field, place quotes around the comma and space as seen to the right.

Click "Replace All" and then click okay to acknowledge the changes and close the window.

Your file should now look like the example pictured to the below.

	A	B	C	D	E
1	Course OID		When Offered		
2	261153	["	Fall", "Spring", "Summer	"]	
3	261154	["	Fall", "Spring", "Summer	"]	
4	261155	["	Fall", "Spring", "Summer	"]	



Enter “=CONCAT (“ in the blank column to the right. Next, highlight the three cells in front of it and press “Enter” on your keyboard.

	A	B	C	D	E
1	Course OID		When Offered		
2	261153	["	Fall", "Spring", "Summer "	"]	=CONCAT(B2:D2

When you press enter, the “=CONCAT (“ formula text will be replaced with the correctly formatted JSON string. Copy the contents of the cell and paste into the entire column. Each column will use the same formula to convert the test.

	A	B	C	D	E
1	Course OID		When Offered		
2	261153	["	Fall", "Spring", "Summer "	"]	["Fall", "Spring", "Summer "]

**Note:** The new column is using a formula and cannot be used as is for your import; if you were to delete the three other columns and attempt to use this new column, the formula will break. Follow the directions below to retain the new formatting of your field values so they can be imported correctly.

Enter the field name at the top of the new column, then select the whole column and copy.

	A	B	C	D	E
1	Course OID	["	When Offered	"]	When Offered
2	261153	["	["Fall, Spring, Summer "	"]	["["Fall, Spring, Summer "]]
3	261154	["	["Fall, Spring, Summer "	"]	["["Fall, Spring, Summer "]]
4	261155	["	["Fall, Spring, Summer "	"]	["["Fall, Spring, Summer "]]
5	261156	["	["Fall, Spring"]	"]	["["Fall, Spring"]]]

Now this needs to be pasted into the original column. Highlight the original column and right-click to choose the “Past Values” option.

	A	B	C
1	Course OID	["	When Offered
2	261153	["	["Fall, Spring, Summer "
3	261154	["	["Fall, Spring, Summer "
4	261155	["	["Fall, Spring, Summer "

After pasting the values, you can delete the extra columns which will not be needed during the import process. Repeat these steps for any other JSON fields and save your file.

Now that the file has been saved, you can import the changes. For information on the import process, see the [Courses Import Module](#).

**Note:** This may vary in different versions of excel. In older and/or mac versions of Excel, enter “=CONCATENATE (“ and select the appropriate cells; if the formula does not convert the data as pictured, edit the formula and ensure that the cell values are comma separated (for example, “=CONCATENATE (B2 , C2 , D2 )”).

# FlashPoint™ Links Module

FlashPoint Links can be used to provide a link to an interactive resource that can be viewed online - such as an image, PDF, word document, or even audio and video files. FlashPoint Links can be attached to a single hierarchy item, course, or program and can display as an icon or as text. You can link to a URL for larger files (like videos) or you can upload a resource into Acalog. The most common file formats are PDFs, Microsoft Office Documents, Images, and Video Clips.

## FLASHPOINT LINK EXAMPLES

These examples are included as inspiration on how you might use FlashPoint Links to enhance your catalog and offer additional resources to your users.

### Hierarchy Items

The University of Maine assigns FlashPoint Links to all School/College Level hierarchy items. They have created a custom bear paw icon, which can be seen in the picture at the right.

All FlashPoint Links will appear in the upper and lower-right corner of the page when viewing a hierarchy item, program, or course; however, FlashPoint Links assigned to hierarchy items will also appear in filter lists.



**Example:** <http://catalog.umaine.edu/>, Select “Colleges and Programs” from navigation

### Programs

Colorado Mountain College uses FlashPoint Links to send users to their online application for admission. They have created a custom “Apply!” icon and assigned these FlashPoint Links to their programs.



### Courses

Edison State Community College uses an uploaded resource rather than a URL. They have uploaded a course syllabus PDF for each course in their catalog and use a custom icon as seen here.



**Example:** <http://catalog.edisonohio.edu/> Select “Course Descriptions” from navigation, select any course such as “ACC 121S”

## CREATE A NEW FLASHPOINT LINK

To create a new FlashPoint link, navigate to the FlashPoint Links Module. When you first access the module, you will see a brief description of a FlashPoint Link and its purpose, to begin working with them, select the tab at the top of the page.

On the Manage FlashPoint Links page, you will see the search, the link to create a new one, and a table listing any existing FlashPoint Links.

Within the table, you will see 6 columns. The first column will list the name of the FlashPoint Link - this will not be displayed anywhere on the Gateway but it is used to help you identify in the Publisher which FlashPoint Link you will be working with.

The next column will be "Alt Text." This is the text that will be entered as the alt text for the icon you provide or will serve as the clickable text if you choose to use text instead of an icon. Next you will see the "Assigned To" column, which will indicate the item that this FlashPoint Link is currently assigned to, if any. The "Status" column indicates if the item is currently visible on the Gateway, the "Make Copy" link allows you to make a copy of the FlashPoint Link in the event you need to make several similar ones, and the "Preview" link provides a quick way to verify that the FlashPoint Link will direct the user to the correct location.

Name	Alt Text	Assigned To	Status	Make Copy	Preview
<a href="#">sample</a>	Test	ACCT 311 - Managerial Accounting <a href="#">[Change]</a>	Active-Visible	<a href="#">Make Copy</a>	<a href="#">Preview</a>
<a href="#">sample (2)</a>	Test	No assignment <a href="#">[Assign]</a>	Inactive-Hidden	<a href="#">Make Copy</a>	<a href="#">Preview</a>

To begin creating a new FlashPoint Link, select "Add a new FlashPoint Link."

### Step 1: Give Your FlashPoint Link a Name

The first step will be to enter text in the "FlashPoint Link Name" field. This will be used for reference in the Publisher and will not appear to users on the Gateway. Each FlashPoint Link must have a unique name, and the field is limited to 50 characters with no formatting allowed.

Next, you will need to enter the "Link Display Text."

This text will serve as the alt text for the icon that will display on the Gateway, or act as the clickable link text seen on the Gateway if you opt not to place your link behind an icon. This field has a maximum of 50 characters, with no formatting allowed.

**Step 1: Give Your FlashPoint™ Link a Name**

**FlashPoint™ Link Name: \***  
[This is the name of this FlashPoint™ Link and will not be displayed on the Gateway.]

**Link Display Text: \***  
[This will be the display text for a URL link, or used as an "alt" tag if you choose a graphical link in step two.]



## Step 2: Decide How You Want Your FlashPoint Link to Display on the Gateway

The next step is to determine how you would like the Flashpoint Link to display on the Gateway.

The first option is “None” and selecting this will opt out of using an icon and instead use the “Link Display Text” as a clickable link on the item.

If you would prefer to use an icon, you can select one of the three available defaults. If you select a default, all FlashPoint Links using the same default will share the same icon. You may also change these icons by visiting the [Gateway Settings](#) in the Gateway Options Module. If you change a default, the change will impact all FlashPoint Link icons sharing the same default.

The last option is to select “Custom.” Selecting Custom will allow you to upload a Custom graphic that may be used in this one single instance. If you choose to upload a custom icon, you will need to be sure the file is a GIF, JPG, or PNG file, under 64KB in size, and no larger than 50x50 pixels in size.

**Step 2: Decide How You Want Your FlashPoint™ Link to Display on the Gateway**  
[Use the radio buttons below to indicate whether to use text or an image for the FlashPoint™ Link.]

**Choose a Graphical Link: \***

None [Use Link Display Text above instead.]

Image 1:  Image 2:  Image 3:  Custom:

 [You must upload a custom graphic before you can choose this option.]

**Upload a Custom Graphic:**  
[If a custom graphic is uploaded, it will be chosen automatically. Each time you upload a custom graphic, the previous custom graphic is overwritten.]

No file selected.

## Step 3: Create Your FlashPoint Link Resource

A FlashPoint Link can be used to direct users to an external URL or to download an uploaded resource.

To provide a link to an external website, choose the “Resource URL” radio button and enter the **full URL**. This must include the “http://” or “https://” in order to save. If this is not included, you will see an error when trying to save the page.

**Step 3: Create Your FlashPoint™ Link Resource**  
[Select a radio button below to indicate whether you want to use a URL or upload a digital file as the resource.]

**Choose a Resource: \***

Resource URL:

Uploaded resource: [You must upload a resource before you can choose this option.]

**Upload a FlashPoint™ Link Object:**  
[If a resource is uploaded, it will be chosen automatically. Each time you upload a resource, the previous resource is overwritten. The maximum upload size is 10.00MB.]

No file selected.

To upload a resource, click the “Browse...” button and select a file, then click “Upload Resource.” The maximum upload size is **10MB**. The uploaded file can be any format viewable via a web browser. Once the resource is uploaded, you can click the “Preview” link to see how it will open for your Gateway users - content provided via a FlashPoint Link will open in a new window. Embedding content is not an option within Acalog at this time.



## Save & Assign

Check the “FlashPoint Link Active?” box to allow the link to appear on the Gateway.

There will be two save options: “Save” or “Save & Assign.”

**FlashPoint™ Link Active?** [Uncheck to hide this FlashPoint™ Link on the Gateway.]

**Delete this FlashPoint™ Link?** [Check to permanently delete this FlashPoint™ Link.]

Clicking the “Save & Assign” button will save your FlashPoint Link settings and automatically take you to the “Assign” tab of the FlashPoint link instead of to the “Summary” tab. Clicking “Save” will save the settings of the FlashPoint Link, but it will not display on the Gateway until it is assigned to an item within the Catalog.

## Assigning a FlashPoint Link

In the “Assign” tab, you can use the provided search to locate content to attach your FlashPoint Link to. FlashPoint Links may be attached to any hierarchy item, program, or course. Additionally, when you first navigate to the “Assign” tab, you will see a list of recently viewed items that you can choose from.

Choose the radio button for the item you want to assign your FlashPoint Link to and click “Save.” Once it has been assigned, you will be taken to the Summary tab for that FlashPoint Link.

**Find an Item**

Enter Keyword or Phrase:

Use exact match only. ⓘ

Find Type:  School/Colleges or Departments  Programs  Courses

Select the radio button of the item to which you wish to assign this FlashPoint™ Link. The items you have viewed most recently are shown by default. If this FlashPoint™ Link already has an assignment, choosing a new one will overwrite the existing assignment. To find a different item, use the search utility above.

Assign	Recently Viewed Item Name	Type	FlashPoint™ Link
<input type="radio"/>	ENG 101 - College Reading and Writing	Course	None <a href="#">[New Link]</a>
<input type="radio"/>	Biological Sciences B.A.	Program	None <a href="#">[New Link]</a>
<input type="radio"/>	AG 100 - Introduction to Agriculture [Inactive-Hidden]	Course	None <a href="#">[New Link]</a>

FlashPoint Links can only be assigned to one item at a time and each item can only have one FlashPoint Link assigned.

## COPY A FLASHPOINT LINK

FlashPoint Links can only be assigned to a single item at a time, however, you can make copies of FlashPoint links. When viewing the list of existing FlashPoint Links, you can click “Make Copy” to duplicate the FlashPoint Link settings. The example from Colorado Mountain College at the beginning of this document is a good example of when you might have FlashPoint Links you want to copy.



The copy will have the same name, but with a number in parenthesis because each FlashPoint Link must have a unique name. The copy will not be assigned and will be inactive by default. Edit the copy to adjust the active status and then assign the FlashPoint Link.

Name	Alt Text	Assigned To	Status	Make Copy	Preview
<a href="#">sample</a>	Test	ACCT 311 - Managerial Accounting <a href="#">[Change]</a>	Active-Visible	<a href="#">Make Copy</a>	<a href="#">Preview</a>
<a href="#">sample (2)</a>	Test	No assignment <a href="#">[Assign]</a>	Inactive-Hidden	<a href="#">Make Copy</a>	<a href="#">Preview</a>
<a href="#">sample (3)</a>	Test	No assignment <a href="#">[Assign]</a>	Inactive-Hidden	<a href="#">Make Copy</a>	<a href="#">Preview</a>

**Note:** When previewing FlashPoint Links within your Publisher, note that only the display text will appear. When the catalog is published, the icons will display properly on the Gateway.

**Enterprise Edition Specific Feature**

Previewing content with associated FlashPoint Links from the Enterprise Edition **will** display the FlashPoint Link icons within the preview.

# Version Auditing Module

Version Auditing is an optional module that, when enabled, will track changes made to custom pages, hierarchy, courses, programs, and shared cores. Version Auditing allows Alerts and messages to be sent to other users and allows users to respond to offer feedback. Manager-level users can use Version Auditing to easily see changes users have made.

**Note:** It is important to keep in mind that while Version Auditing does contain features that allow users to send notifications, this tool is provided as a supplement to your existing processes - not as a replacement. Its primary function is a change-tracking tool, and acts in a largely manual capacity.

## VERSION AUDITING CONFIGURATION

To enable/disable Version Auditing or adjust the custom settings, navigate to the “Configuration & Tools” tab within the Version Auditing Module of your Publisher. Only Managers will be able to view this area and adjust Version Auditing configurations.

When you first access the Configuration & Tools tab, you will find two sub-tabs: Global Settings and Catalog Specific Settings. The Global Settings will be reviewed first.

### Global Settings

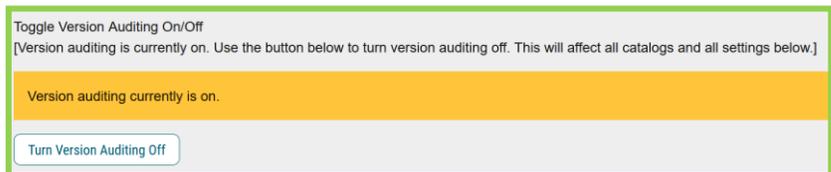
**Note:** Changes made within this section will impact the **entire** Publisher immediately, not just the selected catalog.

Each setting will be separated into gray boxes down the screen, and the current selected settings will be noted in orange text. As you make changes to each item; you must save changes in each section.

### Toggle Version Auditing On/Off

Turning Version Auditing on or off will be a simple toggle. If Version Auditing is turned on, it will be turned on for all catalogs.

**Note:** You will not be able to turn off Version Auditing if there are any items in the Publisher with a Version Status of “FINAL.” You will first need to use the catalog Specific Settings tab to globally change the Version Status of items.





### Select Editor Control Level

Editor Control Level allows you to determine if Editor-level users can reopen items that you've marked as FINAL or route items to groups. By default, these options will be available only to Managers.

It is not suggested that you allow non-manager users to reopen items that have been marked with a status of FINAL as a Best Practice.

### Toggle WYSIWYG Editor Save

You may disable the save button in the WYSIWYG toolbar to force users to choose the save button at the bottom of the page. This will guarantee that they utilize the save option you've provided in the settings below and ensure that automatic snapshots (if enabled) are triggered when a user saves changes. If disabled, the editor save icon will be removed from the WYSIWYG toolbar throughout the Publisher.

If Version Auditing is enabled, it is recommended to disable this feature as a Best Practice.

### Audit Locking

Audit locking occurs when an Audit Event Alert has been created and will prevent other users from editing an item until all Event Auditors have responded. Managers and the Editor who sent the Alert can cancel the Alert at any time even if there has been no response. This setting determines whether your Editors will use this feature. Note that making it mandatory for Editors, will not make it mandatory for Manager-level users who send Alerts.

### Default Save Options

This setting lets you control the save options available to users at the bottom of a page. Checking the box to the right will display the save option for the user. Selecting the radio button on the left will determine the default that will be selected for the user when saving.

### Automatic Snapshots

Automatic Snapshots are the backbone of Version Auditing and will provide you with the fullest history of changes possible. **Even if you are not going to use any other feature within Version Auditing, it is very highly recommended to utilize the Automatic Snapshots.**

To make use of Automatic Snapshots, you will first need to turn them on and select which users should trigger automatic snapshots.

From the drop-down menu, you can choose individual users, or you may choose "All Non-Manager Level Users." This will select all existing users who have an account type other than "manager." Once a user has been added, they will be removed from the drop-down menu so you do not

User Name	Account Type	Remove
Casey Kilborn	Editor	<input type="checkbox"/>
Casey Tedrow	Manager	<input type="checkbox"/>
Sample Editor	Editor	<input type="checkbox"/>

Rev. [11/2020]

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have to remember which users you have or have not yet added. If all users in the Publisher are selected to trigger snapshots, the drop-down menu will not be available.

**Note:** When you add new users to the Publisher, you will need to navigate back to this section and add them to the Automatic Snapshots to have their changes tracked as they work as well.

The “Snapshot Triggers” section will list changes that can be made in programs and shared cores that do not require a master save at the bottom of the page, which is what will typically trigger a snapshot. If all triggers are selected here, these actions will trigger before and after snapshots. If you would like to reduce the number of snapshots generated, you may clear the checkbox for any of the triggers listed and save. Adjusting these triggers will apply to all users and all catalogs.

**Snapshot Triggers**  
[Making a modification to a custom page, hierarchy item, program, shared core, course, or core or adding or deleting a core will always trigger an automatic “before & after” snapshot. Choose any additional events that will trigger automatic “before & after” snapshots. These triggers will affect all catalogs.]

**Programs:**

- A shared core is added to or removed from a program.
- The ordering of cores (and/or shared cores) is changed.
- A course is added or removed from any core level.
- Courses are reordered in any core level.
- An ad-hoc text is added, modified, or removed from any core level.

**Shared Cores:**

- The ordering of cores is changed.
- A course is added or removed from any core level.
- Courses are reordered in any core level.
- An ad-hoc text is added, modified, or removed from any core level.

Save Snapshot Triggers

### Catalog Specific Settings

The “Catalog Specific Settings” is the other option available under the Configuration & Tools tab. Changes made on this page will only impact the currently selected catalog.

**Note:** Each tool listed in this section is completely optional and is never required by the system.

### Change Version Status Globally

In this section, you can change the version status of multiple items in the catalog, marking them as either “Working” or “FINAL.” If you ever decide to turn Version Auditing off in the “Global Settings” tab, you must make sure that you have no items with a “FINAL” status in your Publisher.

First, choose which items you need to have the version status changed. You will need to check the boxes before the drop-down menus will be available.

The first checkbox will allow you to change the Version Status for programs, shared cores, and courses within a selected hierarchy item.

**Note:** Shared Cores will only be affected if you choose the Institution from the drop-down menu.

**Choose Type and Location of Audit Items: \***

- Change status for all programs, shared cores, and courses within:  
Select One...
- Change status for chosen hierarchy item (and for all hierarchy items within):  
Select One...
- Change status of all custom pages.

**Change Status to: \***  
Working

Change Version Status

The second checkbox will let you change the version status of the hierarchy items and all hierarchy items within. The final checkbox will change the version status of all custom pages.

## Remove Audit Events

This section will allow you to remove part of your Version Auditing history for the selected catalog. The “Remove User Events” button will remove manually created audit events and snapshots. The “Remove Before & After Events” button will remove the automatic snapshots but will not impact other system-generated events such as version status changes.

## Remove All Audit Events

This section will allow you to completely clear the Version Auditing history of a catalog. You will first need to ensure that all items in the catalog have a status of “Unchanged” or “FINAL.” You can use the Global Status Change section above to mark all items as FINAL. You will then need to click the “Lock Catalog” button which will prevent editing while the removal processes.

**Note:** You are not required to remove your Version Auditing history. There is no limit on storage space and Version Auditing history will not slow your Publisher. New catalogs (even copies) always begin with a fresh Version Auditing history.

## USER ACCOUNTS ENHANCEMENTS

Once Version Auditing has been enabled, there will be a few enhancements available within the User Accounts module. To see these, you will need to navigate back to the User Accounts module after enabling Version Auditing.

### Version Auditing Relationships

Version Auditing Relationships will allow you to preset default Event Auditors. When a user creates an Alert, the default Event Auditors will already be selected, but can be de-selected if necessary by holding CTRL while clicking the user.

Please note that Version Auditing Relationships work in both directions, which means that if a Manager appears under an Editor’s VA Relationships, then the Editor will also appear under the Manager’s Version Auditing Relationships.

**User Account: Sample Editor**

[Remove edit lock.](#)

### Version Auditing Relationships

Version auditing relationships establish groups of users, “event auditors”, that are preselected when managers or editors create events with audit event alerts. Editor accounts typically create events, but also can participate as event auditors. [No accounts will not show in the list below unless they have access to the same assigned catalogs as the account being edited.]

User assigned successfully.

**Accounts Available for Grouping with this Account:**

Select a user account to add:

**Currently Chosen Accounts:**  
[To remove an account, click the Remove link next to the account name.]

Account Name	User Type	Remove
Catalog Reviewer	Reviewer	<a href="#">Remove</a>

To establish a relationship, select a user from the All Accounts tab of the User Accounts Module, then navigate to the “Version Auditing Relationships” Tab. Next, select a user from the drop-down menu and click “Add” and you will see their name appear in the list below. You may also remove a Version Auditing Relationship at any time.

**Note:** You will only see users listed here who have access to the same catalogs.

## Version Auditing Groups

Version Auditing Groups can be added to allow you to quickly and easily send Alerts and messages to all users within the group. Once a group has been used, the name of the group will become a part of the Version Auditing history of the item and therefore, cannot be deleted or renamed. You can, however, adjust the members of the group at any time.

When you add a new group, you will first need to enter the name of the group. As stated above, you cannot change this later so be very careful in how you name the group. Once saved, you will be able to add users to the group.

### Version Auditing Group: Accounting Department

User Name	Email Address	Account Type	Status	Remove
<a href="#">Heather Kelly</a>	<a href="mailto:hkelly@digarc.com">hkelly@digarc.com</a>	Manager	Active	<a href="#">Remove</a>
<a href="#">Jay Wingo</a>	<a href="mailto:jwingo@digarc.com">jwingo@digarc.com</a>	Manager	Active	<a href="#">Remove</a>
<a href="#">Mara Sansolo</a>	<a href="mailto:msansolo@1digarc.com">msansolo@1digarc.com</a>	Manager	Active	<a href="#">Remove</a>

### Add Users

Find a User Account

Enter Keyword:

By Name  By Email Address

Show only active accounts.

## TRACKING CHANGES

With Version Auditing — and Automatic Snapshots in particular — enabled, you will be able to track changes that are made to items in your catalog. If, for example, we edit a program to add and/or remove courses, we will see snapshots triggered for those changes.

Expanding snapshots will tell you who made the change along with a date and timestamp, as well as any comments. In the case of an Automatic Snapshot, the comments will indicate why the snapshot was triggered.

### Saved Audit Events

Audit Events	Date and Time
<p><input checked="" type="radio"/> <b>SNAPSHOT</b> [Triggered]</p> <p><a href="#">Review Snapshot</a>  <b>Created By:</b> Mara Sansolo  <b>Comments:</b> After snapshot. Course modified.</p>	09/02/2020 14:48:51
<p><input checked="" type="radio"/> <b>SNAPSHOT</b> [Triggered]</p> <p><a href="#">Review Snapshot</a>  <b>Created By:</b> Mara Sansolo  <b>Comments:</b> Before snapshot. Course modified.</p>	09/02/2020 14:48:51



Click “Review Snapshot” to open the full snapshot in a pop-up window. When reviewing a snapshot, you may choose to compare it to any other snapshot using the “Compare to:” drop-down menu. Choose another snapshot and click “Load Comparison” to view both snapshots side by side.

When viewing side-by-side, the snapshot details such as date, timestamp, and comments, will appear above each snapshot. You will now see two drop-down menus, labeled “Left” and “Right” to adjust which snapshots you’re reviewing.

### Snapshot

The snapshot below shows how this course looked when this audit event was created.

**Course:** ENG 101 - College Reading and Writing

**Event Creation Date:** 09/02/2020 14:48:51

**Event Creator:** Mara Sansolo

Select One...

09/02/2020 14:48:51 by Mara Sansolo - Before snapshot. Course modified.

09/02/2020 14:21:24 by Mara Sansolo - Status change from Unchanged to Working.

09/02/2020 14:21:24 by Mara Sansolo - Initial Unchanged snapshot.

09/02/2020 14:14:49 by Mara Sansolo - Attachment Added

Select One...

### Compare Snapshots

Use this view to compare snapshots side-by-side. Click the Combine and Show Changes button above to change to Combine Snapshots view to see changes visually.

<p style="font-size: x-small; margin: 0;">09/02/2020 14:48:51 by Mara Sansolo [Newer]</p> <p style="font-size: x-small; margin: 0;"><b>Comment:</b> After snapshot. Course modified.</p>	<p style="font-size: x-small; margin: 0;">09/02/2020 14:48:51 by Mara Sansolo [Older]</p> <p style="font-size: x-small; margin: 0;"><b>Comment:</b> Before snapshot. Course modified.</p>
<h2 style="margin: 0;">ENG 101 - College Reading and Writing</h2> <p style="font-weight: bold; margin: 5px 0;">Hours: 3</p> <p style="font-size: x-small; margin: 5px 0;">English 101 introduces students to writing as an extended, complex, recursive process and prepares students for English 102, which more rigorously examines the forms and structures of argument and</p>	<h2 style="margin: 0;">ENG 101 - College Reading and Writing</h2> <p style="font-weight: bold; margin: 5px 0;">Hours: Three</p> <p style="font-size: x-small; margin: 5px 0;">English 101 introduces students to writing as an extended, complex, recursive process and prepares students for English 102, which more rigorously examines the forms and structures of argument and</p>



Some changes are better viewed side-by-side; however, there will also be times when you will prefer to combine the snapshots and view a markup of the changes inline. This option is particularly helpful if you're making changes to longer pages of narrative content. In this view, text that has been added will appear green and text that has been removed will be red. Additionally, red and green flags will denote changes to formatting of text.

**ACALOG** Close Window

**Acalog ACMS™ Publisher**

**Compare Snapshots**

Below you can compare any two course snapshots side-by-side, or combine them to see changes.

Left: 03/12/2020 11:58:48 by Rebecca Greene - Initial Unchanged snapshot.

Right: 10/22/2020 16:40:26 by Digital Architecture Group - [No Comments]

**Combine Snapshots**

Changes are displayed using ~~red-strike-out~~ to indicate text removed; and green to indicate text added. The and icons indicate style and other changes. Hover mouse cursor over an icon to display the change information. Note that if's possible there may have been no changes between snapshots, in which case no changes will be displayed.

03/12/2020 11:58:48 by Rebecca Greene [Older] Comment: Initial Unchanged snapshot.  
10/22/2020 16:40:26 by Digital Architecture Group [Newer] Comment: No Comment

**ACC 211--Principles of Accounting I**

~~Credits--~~ Lecture 3 hours.

Introduces accounting principles with respect to ~~financial~~-reporting. Demonstrates how ~~decision~~\_makers use accounting information for reporting purposes. Focuses on the preparation of accounting information and its use in the ~~operation~~ of organizations, as well as methods of analysis and interpretation ~~digarc~~ of accounting information.

~~Prerequisite: Placement into~~-Credits: 3Prerequisite: Eligible to enroll in MTH 130 or higher.

~~Lecture 3 hours.~~

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Acalog ACMS™ v6.4.17 © 2020 [Digital Architecture](#)

## AUDIT EVENT ALERTS

### An Editor Makes Changes and Sends an Alert

The Editor will log in and locate an item they have permission to edit. Permissions will be set by Manager-level users and can be used to restrict which items a particular editor has access to. After making changes, the Editor will choose to “Save and send an audit event Alert.”

First, enter any comment that you would like attached with the snapshot. For example, you might use the comments to indicate why a change was made—perhaps the change was requested by your Department Chair and you want to note that.

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Alerts ? Help manage

Undergraduate Catalog 2020-2021  
[\[View 1 audit event alert.\]](#)

Close





Next, determine who you would like to send the Alert to and if you would like to send additional notification via email. If Version Auditing Relationships have been established, a default Event Auditor will be preselected. Other Editor or Managers will be listed to the right.

Next, choose a comparison snapshot and indicate if you would like to create an audit lock on the item. Finally, click “Create Audit Event Alert” to finish and send the Alert.

### **An Event Auditor Receives & Responds to an Alert**

The Event Auditor will log in and see the flashing Alerts envelope in the upper-right corner of the Publisher. Clicking on “Alerts” will open a tooltip listing all Alerts that have been sent to you. You may also view Alerts by going to the “My Alerts” tab of the Version Auditing Module.

You will first see a summary table showing where Events exist and whether they are Open/Active or Closed. You will then need to navigate to the appropriate sub-tab to view the Alert.

By default, only open/active Alerts will be displayed, but you may choose to view all Alerts. The Alerts can be expanded to view more information about the Alert that’s been sent. Click “Response Requested” to review and respond to the Alert.

The Event Auditor can review the changes, view a full Version Auditing history, and any attachments to programs or courses. After reviewing the changes, navigate to the “My Response.” You can choose to mark the changes are approved or rejected and leave comments.

**Note:** Marking an Alert as approved or rejected will not have any impact on the item’s status and will not revert changes.

### **View Response & Advance Version Status**

The Editor will receive an email notification when there has been a response. Additionally, the Editor may look for a response in the Publisher in one of two ways. One option is to navigate to a specific item and view the Version Auditing tab. The second option is to navigate to the “My Events” tab of the Version Auditing Module. To view any provide comments, click on the decision text to view a tooltip.

<b>AUDIT EVENT</b>	Manager Digarc - <a href="#">Approved</a>
Date: 09/02/2020 14:55:54	<a href="#">[Review Snapshot]</a>
Created By: Mara Sansolo	
Comments: [No Comments]	

If the Event Auditor has rejected the changes, the comments may provide guidelines on the changes to be made. At this point in the process, Steps two and three might be repeated if further changes need to be made and reviewed.

If no further changes need to be made, the Editor may advance the Version Status of the item from “Working” to “Approved.” This can be used to indicate that changes have been completed and reviewed and may act as a signal for a Manager to step in and do a final review.

### **Final Manager Review**

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Manager level users have the final say in publishing changes to a catalog. In the “All Events” tab of the Version Auditing Module, a Manager can view all snapshots and Alerts that have been generated, regardless of which user created the event. There are several search options that can be used to refine the results and locate specific types of events.

One option is to view only items with a specific status. For example, if Editors advance the Version Status of items to “Approved” after changes are complete and reviewed, this can be a cue for the Manager to step in and conduct a final review.

**Start Date:** \* [MM/DD/YYYY] 09/02/2019  
**End Date:** \* [MM/DD/YYYY] 09/02/2020

**Show Status:** \*  
 New  
 Working or Approved  
 Working  
 Approved  
 Final  
 Locked

**Show the Following Event Types:** \*  
**User Events:**  
 Audit Events  
 Exclude Closed Audit Events  
 Snapshots  
 Route Event Alerts  
 Attachments  
 Status Changes

**Other Events:**  
 System Generated Snapshots  
 System Generated Status Changes  
 Triggered Snapshots  
 Event Deletion

Search

From here, a Manager may view the full Version Auditing history of the item or navigate directly to the item itself. After reviewing, the Manager may change the Version Status of the item. If further changes need to be made, the Manager can change the Version Status back to “Working.” If the item is ready for publication, the status may be advanced to “FINAL.” Unless you’ve permitted your Editors the ability to reopen FINAL items, only Manager-level users will be able to make changes to (or reopen) an item marked as FINAL.

### Handling an Unresponsive Event Auditor

From time to time, there may be situations where an Event Auditor has not responded to an Alert in a reasonable amount of time or perhaps you no longer need a response from that user. When this happens, the Alert may be cancelled in one of two ways:

First, any Manager or the Editor who originated the Alert may choose to remove an audit lock and cancel an audit event Alert. This option will cancel the entire Alert; if the Alert has been sent to multiple users, it will be cancelled for all users regardless of whether anyone has responded.

Second, a Manager can choose to cancel the Alert for a single user. To do so, the Manager must navigate to the “All Events” tab and view the Alert. The Event Auditors will be listed, along with their responses or the text “No response yet.” Clicking this text will open a tooltip listing three options as seen in the image below. You may also enter comments to accompany this decision.

Manager Digarc - [No response](#)

- Send an email to this user requesting action on this audit event alert.
- Cancel this audit event alert for this user and send an email notification.
- Cancel this audit event alert for this user but send no email notification.

**Optional Remarks:**

## ROUTE EVENT ALERTS

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You must have Version Auditing Groups established to make use of Route Event Alerts. As previously noted in the Version Auditing settings, routing items is only available to Managers by default, but you can choose to grant this option to Editors as well. This Alert is intended to notify a group of changes but requires no action from the recipients.

### Sending a Route Event Alert

To create a route, click “add a new route” on the Version Auditing tab of the item you would like to send.

Choose a group from the drop-down menu. You can click the “See Group Members” link to see a tooltip listing the members of the group you’ve selected.

You may enter comments or leave this field blank. When you’re done, click “Route Item” to send the Alert.

**Group:** \*

Select a group ...

[See Group Members](#)

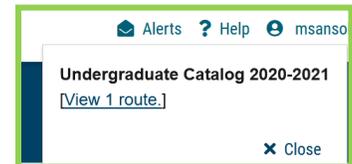
**Enter Comments:**

Route Item

### Reviewing a Route Event Alert

The Event Auditor will log in and see the flashing Alerts envelope in the upper-right corner of the Publisher. Clicking on “Alerts” will open a tooltip listing all Alerts that have been sent to you. You may also view Alerts by going to the “My Alerts” tab of the Version Auditing Module.

You will first see a summary table showing where Events exist and whether they are Open/Active or Closed. You will then need to navigate to the appropriate sub-tab to view the Alert.



By default, only open/active Alerts will be displayed, but you may choose to view all Alerts. The Alerts can be expanded to view more information about the Alert that’s been sent. Click “Acknowledge Route Alert” to mark that you’ve seen the Alert; if you do not acknowledge the route, the Publisher Alert will remain active.

^ ACCT 221 - Principles of Accounting I [Edit Item] [View History] [View Attachments]

+ New Snapshot + New Audit Event Alert + New Route

**ROUTE**  
**Date:** 09/02/2020 15:05:34 [Review Snapshot]  
**Created By:** Mara Sansolo  
**Routed To:** Accounting Department  
**Status:** Active  
**Comments:** [No Comments]

# Export Module: Catalog

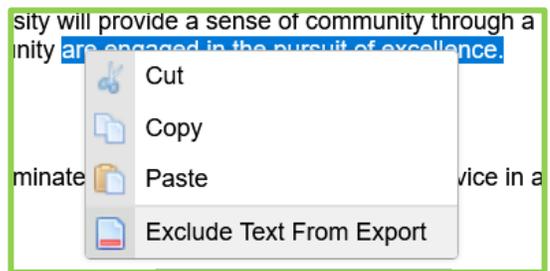
The Catalog Export can be used to prepare a PDF or prepare your catalog for printing. The Publisher does **not** create a fully paginated, print-ready document; however, it does generate a clean extract of the entire catalog.

## REVIEW CONTENT

### Review Custom Pages

The first step will be to review each Custom Page presented within your online catalog and decide if you would like to include it within your printed content.

Within each Custom Page, ensure that any items you wish to see excluded from the export are marked with a red dotted line. A common example would be the list of navigational items at the top of each page. If you need to exclude additional information, select the text, then right click and choose "Exclude from Export." Save the page.



If you find that something has been marked to be excluded, but you would like to now include it, you can simply right click on the item again, then choose "Include in Export."

**Note:** You will note need to mark any images to be excluded. By default, all media files will be excluded from the export as they are generally included within your online catalog at a lower resolution that is not suitable for printing.

### Review Filters

Hierarchy descriptions, programs, and courses will only export as part of a filter. If desired, you can set up a filter, or series of filters to export your content in different ways, depending on how you want them organized in your printed document.

You may choose to export the filters you already have, or you can choose to set them up in a different way for printing purposes. If you decide to create filters just for printing purposes, you can make them inactive to prevent them from appearing on the Gateway. Additionally, you may want to label them as "For Print" in the filter title so you can easily identify them later.



## GENERATE THE EXPORT

Navigate to the Export Module and choose the “Catalog Export” tab. You will be taken to the “Queue” sub-tab first, but before you can start the export, you need to set up two items: a print styleset and an export map.

### Create a Print Styleset

A print styleset decides the formatting of your exported document. Once set, the entire document will export following this formatting layout - however it will **NOT** affect contents within your Publisher or on your Gateway. You may choose to create as many stylesets as you would like, and you may further change the styles in the exported document.

First, you must give the print styleset and a name. The left column will display the name of each text type using the current style settings.

The “Font Name” drop-down menu has a limited selection of font types that can be used. You can use the “Size” drop-down menu to resize your text. Italics, Bold, and Underlined styles can be added using the checkboxes on the right. The text will update as you make changes, so you can preview how each text type will appear in the exported document.

Text Type	Font Name	Size	Italics	Bold	Underlined
Header 1	Arial	22 pt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Header 2	Times New Roman	20 pt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Header 3	Times New Roman	18 pt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### Styleset Map

The following map can be used to give an overview of how the different text types found in the style will be applied to your exported document.

Text Type	Use in Catalog
Header 1	Almost never used; as a Best Practice we suggest content begin with a Heading 2
Header 2	Any items formatted with a Heading 2 element in the WYSIWYG editor; commonly found in custom pages as major navigation headings
Header 3	Any items formatted with a Heading 3 element in the WYSIWYG editor
Header 4	Any items formatted with a Heading 4 element in the WYSIWYG editor
Header 5	Any items formatted with a Heading 5 element in the WYSIWYG editor
Institution Title	Title of institution pulled from first level of Hierarchy when referenced within a filter

School/college Title	Title of a school/college pulled from Hierarchy when referenced within a filter
Department Title	Title of a department pulled from Hierarchy when referenced within a filter
Page Title	The navigation link label should appear once on each item exported
Type Title	Program, degree, or course type; used to organize contents within a filter
Program Title	Title of programs
Program Course	Course that has been dynamically linked within a program
Course Title	Title of courses when exported in a filter. When opened in word, the style may appear as just 'Course'
Adhoc	Text that is used between or around the dynamically linked courses
Core Level 1 Title	Title of a first level core
Core Level 2 Title	Title of a second level core
Core Level 3 Title	Title of a third level core
Core Level 4 Title	Title of a fourth level core
Core Level 5 Title	Title of a fifth level core
Core Level 6 Title	Title of a sixth level core
Body	Most of text; anything formatted as 'normal' in the editor. May appear in custom pages, programs or courses. It may display in Word as 'normal' rather than Body
Strong Emphasis	Text that is bold
Emphasis	Text that is italicized
Underlined	Text that is underlined



## Create an Export map

An export map will need to 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.

First, enter a name for the export map and click “Save.” You will see a list under “Export Ordering” of all Custom Pages and Filters in your catalog. Items shown in green will be included in the export while items in red will be excluded. By default, Custom Pages and Filters that are set to active in the Publisher will appear green and inactive items will appear red. You can click on the name of an item to toggle it from green to red or from red to green.

	Catalog Home	[System Default]
	University Calendar	[Custom Page]
	General Information	[Custom Page]
	Administrative Procedures	[Custom Page]
	Academic Procedures	[Custom Page]

You may also use drag-and-drop functionality to move items in this list. The ordering of the export map will determine the ordering within the exported document.

Be sure to click “Save Ordering” after making changes to the Export Map.

**Note:** Once an Export Map has been established; if you modify the amount of content in your Publisher, the next time you attempt to edit the Export Map you will be prompted to acknowledge the changes to the map. Click “Acknowledge and Continue” to continue using the map after reviewing the changes.

**New Navigation Items:**

The items below were added to the Gateway navigation and must be included in this export map. To continue using this export map you must acknowledge the new items by clicking the button below.

Overview

**Modified Navigation Items:**

The items below were modified and must be updated in this export map. To continue using this export map you must acknowledge the modified items by clicking the button below.

School Calendar

## 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. The last two items in this list are suggested because Microsoft Word can struggle with lengthy documents.

- Word 2007 or later is recommended (*This was written based on Office 365*)
- Word 2000 minimum
- Turn off spell/grammar checking
- **Multiple Document is recommended**



First, choose the type of document you would like to use for your export. In addition to a Microsoft Word document, you can export the catalog as an HTML document.

Both options can be exported as single or multiple documents. When “Multiple Document” is selected, each item listed in the export map will be a separate file, numbered to follow the export map ordering.

**Document Type:**  
 HTML (Multiple Document)  
 HTML (Single Document)  
 Microsoft® Word (Multiple Document)  
 Microsoft® Word (Single Document)

**Export Styleset:**  
[Choose which styles should be applied to the finished document.]  
Select One... ▼

**Export Map:**  
[Export maps suffixed with a "+" include filters with settings that will limit course exporting. Those suffixed with a "\*" have had items added or removed since it was last saved. Please verify changes in the [Export Maps](#) section.]  
Select One... ▼

**Note:** It is highly suggested to use the multiple document method for each export, unless you are exporting a single item. When the export reaches certain lengths (around 3-400 pages in length or so), you may see a formatting error start to occur in which the characters press to the right of the screen until only a single character is visible. The only resolution to this is to run the export in the multiple document format and compile the export after.

Next, choose your styleset and export map from the available drop-down menus. If no drop-down menu appears, you have not yet created the necessary items. Sometimes you will see items in the export map appear grayed out; this indicates that items have been added or removed since the export map was last saved. You will need to edit the export map to verify the changes.

**Note:** If you see a "+" symbol, this indicates that the filter contains too much content and the course information will be condensed. If you see a "\*" symbol, this indicates the map has had modifications since it was last saved and needs to be reviewed before it can be selected.

Next, you may choose from a list of additional options and check any that you would like to apply to your export. The options are:

- **Hide item types** - if you have a filter that groups items by type, this setting will exclude the types in the print document.
- **Expand courses in filter links** - this option should be selected to export the full course details; if this is not chosen, filters will provide a list of courses without their full descriptions.
- **Expand courses in programs** - this option can be selected to export the full course details within the body of program requirements; this is not recommended as a Best Practice as it will make for a very lengthy document and include a lot of duplicated content as courses often appear in many different programs.
- **Include active-hidden programs** - because active-hidden programs do not appear in filters on the Gateway, they will only be included in the export if you check this box.
- **Remove all styles not defined by the print stylesheet** - checking this box will remove any custom styles that may have been added to your catalog as well as any styles that were added by a copy/paste action.



Lastly, click “Add to Export Queue.” Due to the resources required and the processing time needed to export the data you have requested, Aalog 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 on the amount of content being exported.

## DOWNLOAD THE EXPORT

Once the export is complete, you can download it from the Export module, or you can use the link that is e-mailed to you. If you followed the multiple document recommendation, the download will be a folder of individual files for each item in the export map.

## REVIEW AND FORMAT THE EXPORT

**Note:** *While we are happy to offer our experience and knowledge with Microsoft Word, it is not a product for which we offer technical support. We are unable to offer the level of support within Microsoft Word that we can within Aalog. To that end, we are always happy to learn new tricks from our clients. If you know something we do not, please let us know so we can offer that to other clients as well. You can send us your tips and tricks at [training@digarc.com](mailto:training@digarc.com).*

### Adjust Spacing

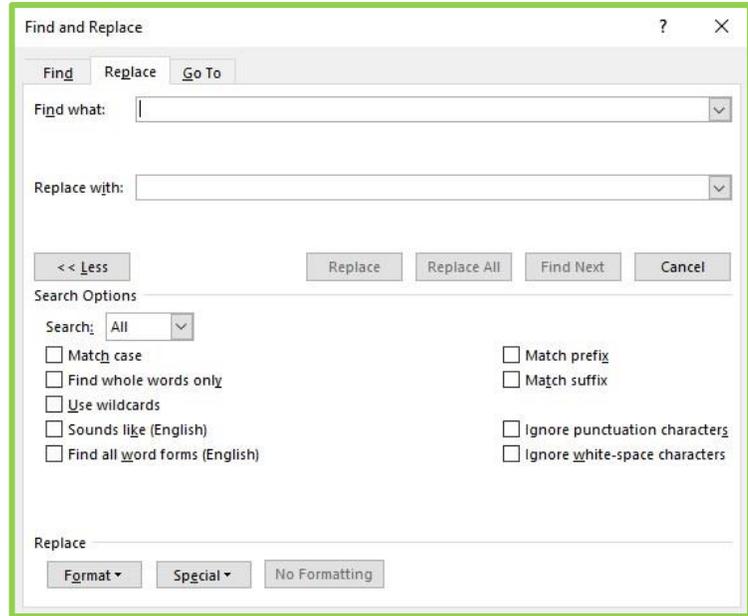
The first goal is to improve spacing and reducing page count in each document by removing spacing and section breaks, using quick find/replace actions. This will need to be done within EACH document prior to combining them together.

Enable the non-printing characters to see section breaks, line breaks, and other invisible characters. This can be enabled by clicking what looks like a backwards “P”  from the Home ribbon of Word’s menu. Use the Find and Replace feature to locate the Section Breaks and Double Line Breaks from the document, replace them with nothing.



First, we will use find/replace to remove section breaks. Place your cursor in the “Find What” section and click the “More >>” button in the bottom-left corner. Next, click on “Special” and select Section Break. You can also search for **^b**. In the “Replace with” field, leave it blank, and click “Replace All.”

To search for double line breaks, click the “Special” button again and choose “Manual Line break.” Select it again to create a double line break. You can also search for **^I^I**. In the “Replace with” field, leave it blank, and click “Replace All.”





## Combine and Format Documents

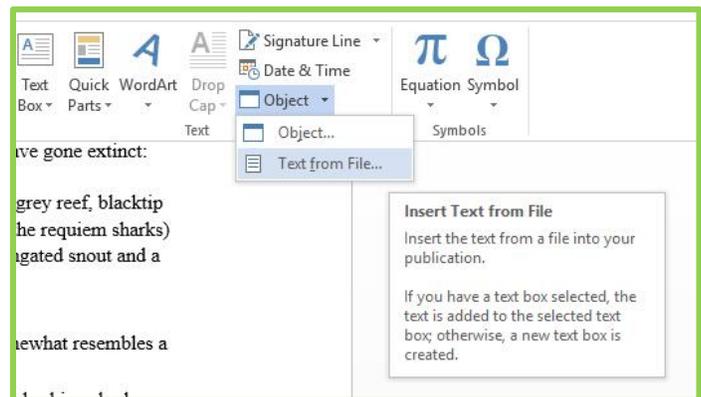
The next step will be to combine the documents into a single document, so that you can manage the styles and apply items like page numbers and tables of contents. You'll want to be sure to do this step before changing any styles, so that the changes affect ALL documents, rather than having to change each one.

### Combine the documents together.

To combine documents, place the cursor at the end of the first document.

You may want to add a Page Break to separate sections, by pressing **Ctrl+Enter**.

Select the "Insert" tab in the ribbon at the top of Word, then choose "Object," and "Text from File." Select the next document you would like to insert. Repeat this until all documents have been combined into a single document.



### Add columns (Optional)

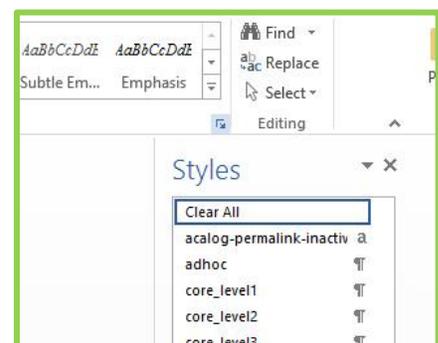
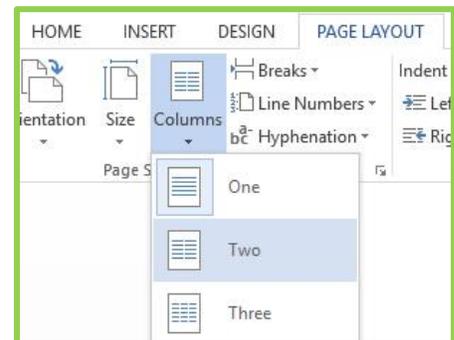
You may want your entire catalog or sections of the catalog to appear in multiple columns. In print catalogs, the courses section is often formatted in columns even if the rest of the catalog is not.

First, select the content that you would like to appear in columns. Next, select the "Page Layout" tab in the ribbon at the top of Word. Choose Columns and select the number of columns you would like to use.

### Modify styles to adjust content.

To access the Print Styleset from Acalog, select the Home Menu. In the box listing the default header options, you will find a small arrow in the lower right corner. You may also access this by pressing **Alt+Ctrl+Shift+S**. Hovering over any the items, then selecting Modify will allow you to manage every item formatted with that style throughout the document.

**Note:** Changes to the "Normal" style will affect the body text for all content - Custom Pages, Hierarchy Items, Programs, and Courses.





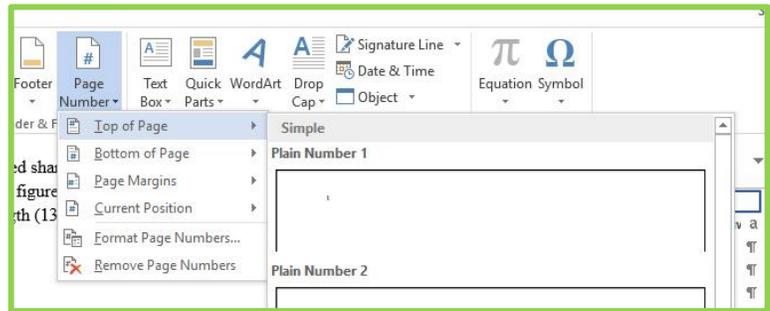
### Apply page numbers and footers.

The “Insert” tab will give you options to add items like headers, footers, and page numbers.

Click “Page Number” and choose the desired location and format.

If you do not want the first page to be included in the numbering, you can select “Different First Page.” If you want the second page to display as “Page 1,” you will need to change the starting value, by formatting the page numbers and setting the starting value to 0.

For headers or footers, select the appropriate option, choose a display method, and then you will be able to apply text or images to the header/footer section if desired.



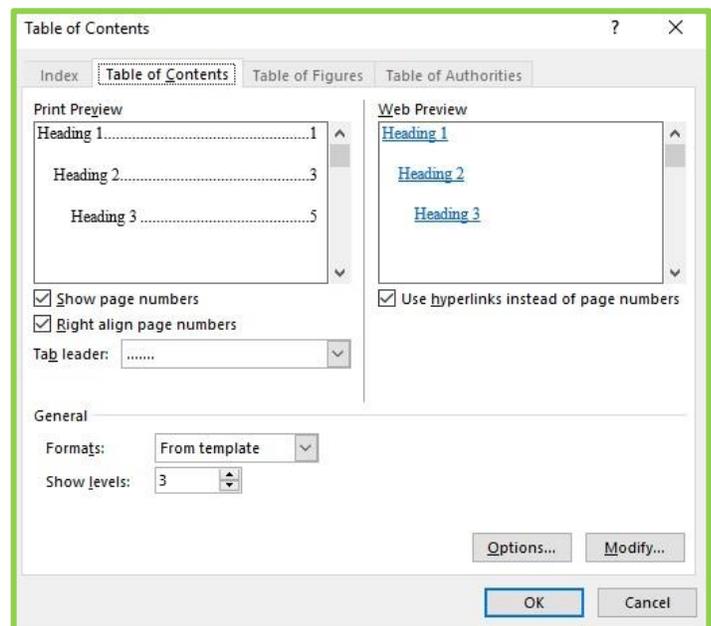
### Apply a table of contents

In the “References” tab in the ribbon at the top of Word, click “Table of Contents.” You can choose from a list of pre-formatted options within Word or you can choose “Custom Table of Contents” to customize your settings.

By default, the table will include Headings 1, 2, and 3. If you would like to include more items - perhaps Programs, you can choose Options to review the list of styles.

Headings 1-3 are defined as Table of Contents Levels 1-3. If you would like to add more items, you will scroll to the style and add a new value, like 4.

Now that your document is formatted, you may choose to export it into a PDF for distribution, or you may continue to work on formatting the document further.



## Export Module: Courses

From the Export Module, the Programs & Courses Export tab will allow you to generate a spreadsheet that you can use to format and update your course information to push back into Acalog. You have the option to export your courses or export your Programs. A Programs Export is a read-only file; you cannot make bulk changes to Programs using an Export.

Underneath Export Courses, you will need to choose a data format (CSV or XLS or XLSX). If you are going to be pushing this document back into the Publisher, ensure that you have selected the XLS or CSV data format, as the Publisher will not allow for the upload of an XLSX file type.

Please be sure that you only click the “Export” button once. You do not need to wait on this page while the export process. You will receive an email with a link that can be used to download the course export, or you can navigate back to this page to download the link. The download link will not expire, however, it can only be used once.

### Export Courses

To export the course database for the selected catalog, click the appropriate Export button below. The export may take a few moments to run (please do not click the Export Courses button multiple times). Afterward you will be able to immediately download a file you can open in a spreadsheet program, text editor, or import into another database. [?](#)

Warning: There is a known bug in Excel when opening standard UTF-8 CSV files. If you need to edit an export in Excel by hand, please choose one of the other formats.

**Course Data Format: \***

- Export courses to CSV (.csv).
- Export courses to XLS (.xls).
- Export courses to XLSX (.xlsx).

Export

## FILE MODIFICATIONS

### Modify Existing Courses

If the goal is to modify your existing courses, the first step will be to remove any unnecessary content from the file. The only information you will need will be the courses you need to update, and of those courses you will only need to keep the fields needed to identify them (a unique attribute, like Course OID or a combination like Prefix and Code) and the fields that you are going to modify.

Removing all extra data helps to ensure that there are no errors when uploading the file and makes for a smaller file, which will import faster. As a Best Practice, we recommend that files being uploaded back into the Publisher contain 1,000 courses or fewer to process correctly. You may want to break large files in to multiple, smaller files for uploading purposes.



## Hierarchy & Course Types

If you need to modify the hierarchy item that owns the course - such as changing an item from Biology to Chemistry - then you will need to modify the “Entity Name” column. The “Entity Name” lists the name of the Hierarchy item that most directly owns the course. It is very important to remember that your Entity Name must 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 set to the default upon import.

Like “Entity Name,” the “Course Type” column must exactly match the course types listed in the Item Types Module for your catalog. If the course types vary between your file and your Publisher, a default will be applied to the course.

## Course OID

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 and is automatically created in the system. Since we are changing existing courses, we will use the Course OID to identify each course. You cannot change a course’s OID, and a course will receive a new OID when a catalog copy is created.

## Rich Text Fields

Three columns will be generated for each rich text field in your courses template; the first of these columns will be just the field name, followed by “(Rendered)” and “(Rendered no HTML)” columns.

The first column, bearing the name of the field only (ex: Description), will contain information specific to Acalog - such as PermaLink information. If you are updating this field to import back into Acalog, we recommend that you use this column.

The rendered column includes HTML formatting tags and the final column will be plain text only. These columns are provided for use updating other systems but should not be used when updating Acalog. If you update Acalog using the “(Rendered)” or “(Rendered no HTML)” columns, all PermaLinks in your courses will be removed.

T	U	V
Prerequisite:	Prerequisite: (Rendered)	Prerequisite: (Rendered no HTML)
<p>[[permalink=69   tooltip: {'title': 1}]]% prefix% %code%[[/permalink]].</p>	<p>ACCT 221.</p>	ACCT 221.
<p>[[permalink=70   popup]] [[/permalink]] and a minimum of 55 sh credit.</p>	<p>ACCT&nbsp;222 - Principles of Accounting II&nbsp; and a minimum of 55 sh credit.</p>	ACCT 222 - Principles of Accounting II and a minimum of 55 sh credit.



## Add New Courses

Using the exported file, you can also add new courses to your Catalog. This can be done at the same time as an update, however you will need to use another unique attribute to match on other than Course OID - as your new courses will not have this information yet. In this case, prefix and code are the next best items. Fill in the course information based on the columns presented in the file. It is important to note that when assigning Hierarchy and Entity types, that they match exactly as they are in the Publisher (capitalization does count!). Also, make sure not to enter anything in the OID columns, as these are unique numbers that the Publisher will assign upon import.

The columns in the spreadsheet directly correspond to your courses template. You can also download an empty file template from the Courses Import Module. Because you are creating new courses, you must fill in all required fields during the import process.

If no information is provided in the required fields, the validation will fail during import and it will provide you with an error, showing which rows are missing data. You will be unable to proceed until you adjust your spreadsheet to ensure it contains all the required information - or until you cancel the import and adjust the Courses Template to change the field from required to optional.

**Errors**

**Required Data Missing: Description**

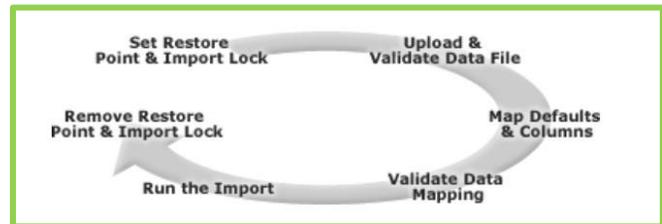
The following 3 rows are missing required data:

2	3	4
---	---	---

**Recommendation:** Please check your data file and be sure all the rows have the required data.

# Courses Import Module

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.



When using the Courses Import module, the catalog chosen must be an **unpublished catalog**. If it is necessary to perform a course import in a published catalog, the catalog must be unpublished in the Catalogs Module prior to performing the Course Import. Once the import is complete, the catalog may again be published to the Gateway using the Catalogs Module.

## RESTORE POINT & IMPORT LOCK

Everything begins by setting a restore point and import lock. This backs up your database to this current point in time and it also locks it. If you have anyone who may be working within the Catalog when you are going to be performing an import, we recommend you let them know. This is because if they are working within a Program or Custom Page and you lock the Catalog, they will not be able to save their content. The import lock will prevent anyone - including a manager - from making any edits throughout the entire database including Catalog managers.

### Import Lock and Restore Point Options

Set Restore Point and Import Lock

Once an Import Lock is placed on a catalog, an [IL] will display in the catalogs drop-down menu, and the Import Lock can only be removed by navigating to the Courses Import Module and either Finalizing or Canceling the Import.

Undergraduate Catalog 2020-2021 [L IL]

▼

Go

## UPLOAD & VALIDATE DATA FILE

This is where you will select the file to upload into the Publisher. It will only accept file types of .CSV or .XLS, so any other file types will need to be converted prior to the upload. To begin, click “Browse.” Notice you must declare the file type, whether it’s an Excel or CSV file. Then click “Upload.”

### Upload a Data File

Upload a data file to import into this catalog. For your convenience, you may download an [empty CSV](#) or [empty Excel](#) data file template customized for the selected catalog, which you may use to build a new data file. The maximum upload size is 5 megabytes.

We recommend that you remove all unnecessary columns and rows from your file before uploading.

No file selected.

File Type: \*

Excel (.xls) File
  CSV File

Note: All CSV documents must use unicode (UTF-8) encoding. If you would like assistance with this, please contact [Support](#).

Note: All date formatted cells in Excel files will use the formatting 1/13/2011. If you wish to use another format, you may format the cells as 'General'. If you would like assistance with this, please contact [Support](#).

[Uploading may take several minutes, depending on the size of your file.]

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. Once it has uploaded, the file will appear, and you will need to select the radio button next to the File Name and click “Next” button.

Rev. [11/2020]

Proprietary & Confidential

## Troubleshooting: Duplicate Header Rows

Duplicate Header Rows is an error that can occur when the same item appears twice in the top row of a spreadsheet. This can happen by copying and pasting a column, or when the content comes from another source entirely.

This issue is very easy and quick to find because the error will occur before the actual import. When the file is prepared, and a catalog has been import locked - the next step would be to upload the data file.

In the example, you will see that the file has "Course OID" twice in the top row.

I	J	K	L	M	N
Course OID	Course Type	Prefix	Code	Name	Course OID
196937	Animation	SMP	101	Sample Course	

When we upload this file, the Publisher will try to identify the header of each row.

**An error occurred trying to process the file. The data file contains duplicate column headers. Duplicate column headers are not allowed. Please [try again](#) or contact [Support](#).**

Finding a duplicate, it will stop this file from being able to import, and show the message shown at the right. The Publisher will not allow this file to import; to proceed, you must go back to your file and locate the duplicated item.

## MAP DEFAULTS & COLUMNS

### File Contents

First, choose what actions you will be performing with this import:

- Inserting new courses (adding brand new courses only)
- Updating courses (only changing existing courses)
- Inserting new courses and Updating existing courses at the same time
- Changing the active status of existing courses but editing no other content

### Data File Content

This import permits both updating existing courses and inserting new courses. It does not support deletion of courses. Your data file may contain both course modifications (updates) and new courses (inserts). Choose one option below that matches the purpose of this import.

**Data File Contains: \***

[After you make a selection, additional workflow will be inserted below specific to the option you have selected.]

- Insert: New courses to be added only. 
- Update: Modifications to existing courses only. 
- Insert/Update: Both new course additions and modifications to existing courses. 
- Status Change: Modifications to course "active" status for existing courses only. 



## Hierarchy, Types, and Status

If your file does not include changes to Hierarchy ownership, course types, or active status, you can skip this section and continue to the next page. If any of these three fields **are** included in your file, you must first choose the column name that holds the data for the respective field in the Publisher.

After choosing the correct column, you will be required to choose a default to be applied if the contents of the column in the file do not match the items in the Publisher. The values housed in these columns must be an exact match - in spelling, spacing, and punctuation - to properly import. The following table highlights some examples which will cause defaults to be applied.

**Hierarchy Item Column:**  
[Choose the column from your data file that represents the entity which directly "owns" each course.]

Select One ...

**Default Hierarchy Item: \***  
[If a row in your data file does not contain division information, or does not match division information currently in the Acalog ACMS™ database, select a default to be set during import.]

Select One ...

Publisher	Exported File
Department of Information Technology	IT Dept
Mathematics	Math
Accounting, Economics, Finance	Accounting, Economics, and Finance

## Validate Data Mapping

Next you can begin mapping the information. If you are using the Course OID, Course OID should be the key. Declare your key field by checking the box next to Course OID. Your key fields will be required for all courses in the file. From the drop-down menu, select the "Course OID" column to map that field.

Key	Data Field	Course Fields	Example Data
<input type="checkbox"/>	Select One ...	Catalog Name/OID	
<input checked="" type="checkbox"/>	Course OID	Course OID*	14936
<input type="checkbox"/>	Prefix	Course Prefix	ACCT
<input type="checkbox"/>	Code	Course Code	222

Then map each field using the drop-down menus (prefix, code, name, hours, etc.). You will see that next to these fields, it will pull examples from the file for each mapped field, so that you can verify that you are pulling from the right section. Once you have mapped your fields, click "Validate Choices."

Under "Review" you want to see "No Data Errors Found." If there are errors, you will not be able to continue with the import.

Below the review, there is a Course Preview. If you see "Not mapped or no import data found," that indicates that the file does not contain information for that field.

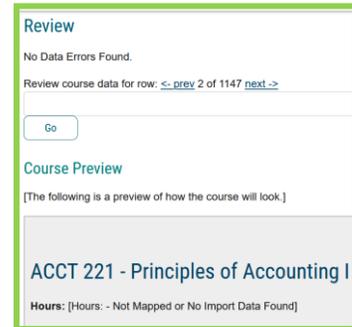


## Troubleshooting: Validation Errors

There are two errors that may be returned when validating your mapped fields, both are related to the “key” field in your file. Because the key is used to match a row in the file to the correct course record in Acalog, each course **must** have a key when updating courses, and that key cannot be repeated.

In the example file to the right, rows two and three contain the same “Course OID,” which is the field being used as the key field. In this example, the Publisher would not know which row to use when updating the course associated with that course OID so you would receive an error message. The error states “Duplicate rows found for key selection.” Below the type of error, you will see a heading for “Affected Rows.” Only the second instance of a duplicate will be listed as the affected row.

If you upload a file that is missing key information, you will see a message telling you that the key is missing and will see the affected rows listed just as with the duplicate rows error above.



	I	J	K	L	M	
1	Course OID	Course Type	Prefix	Code	Name	
2	196937	Animation	SMP	101	Sample Course	
3	196937	Animation	SMP	101	Sample Course	

## RUN IMPORT

Next, choose “Run Import Now.” This is where the size of your file is really going to make a difference as it will affect how long it will take to process. The larger your course file, the longer it will take. We recommend that you break your course files into smaller sections to help them process faster. Our Best Practice is to limit files to no more than 1,000 courses.

Once your import is complete, you will be taken back into the Courses Import page. The very last section in the table - “Last Import Notes” - is the most important. This section will tell you how many rows were processed during the import. It will also tell you how many courses were updated and how many were added as new; if you are running an insert/update import, this will let you check that the right number of courses were updated/added. It is easy to accidentally duplicate courses in an insert/update import; if you have course updates with missing key fields, they will not be flagged like in a regular update import, instead they will be seen as new courses.

The “Last Import Notes” will also tell you if default hierarchy, type, or active status had to be added to any courses and, if so, how many courses. If you have a lot of courses with the default applied, it might be better for you to cancel your import and reexamine your file then import the courses again.

For more details, you can navigate to the Courses Import Review Tab to preview the modified courses. You can then click on each course link to preview the course details, including ownership, type, and active status.

## REMOVE RESTORE POINT & IMPORT LOCK

Once you are done reviewing all your courses you can go back to the Courses Import Tab where you will choose “Finalize Import Process.” Up to this point, you can still cancel. If you cancel, it will take some time to unlock and restore the database to how it was before this import. Finalizing the import process occurs at once. Now your courses import is complete. Your import lock has been removed and your courses have all been updated, and the catalog can be published again.

## Remote Services Module

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The features in this section are optional can be used to enhance your catalog. These features will need to be setup or enabled by our team; however, there is **no** additional cost.

### REMOTE SERVICES MODULE (API)

#### Web Services APIs

The Application Programming Interface, or API, is not directly supported the way the rest of Acalog is, so you must have someone at your institution who is familiar with API protocol to use this feature. There is added documentation that must be signed before the API can be enabled in your Publisher. You can contact the support team to request this documentation and enable the API.

The web services APIs allow you to access catalog content from outside of the Acalog ACMS™. Catalog content may be searched and individual pieces of content, such as programs or courses, may be retrieved.

#### Widget API

This is tool allows you to pull data into your institutional website. With it you can create links that always stay up to date, pull lists of items with certain criteria, or directly load in the content of a specific item.

Information on the Widget API can be found by clicking the tab in the Publisher, including a button to “Request Widget API.”

### VARIABLE REPLACEMENT URL

This feature will allow you to have a direct link to your course scheduling system inserted into every course in your catalog. To enable this feature, you will need to submit a Support ticket containing the URL and the appropriate term code.

**Note:** *To use this feature, your course scheduling system must be publicly available (cannot require a username or password to access).*

# Portfolio Options Module

When enabled, the portfolio feature will allow users on the Gateway to save items to review later. By default, this feature will be labeled as “My Portfolio,” but a custom term can be used. The Portfolio Options Module allows you to enable or disable the portfolio.

A star icon will appear in the upper-right corner of pages on the Gateway. Clicking on this icon will add the page to the user’s portfolio and open a pop-up window showing the current portfolio contents.

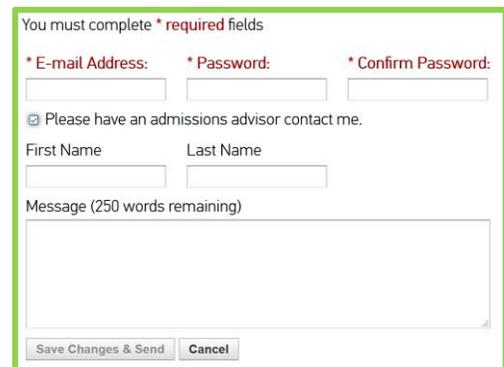


- **None** - Choosing this option will disable the portfolio feature completely. Gateway users will not see the star icon to save items and “My Portfolio” will be removed from the navigation.
- **Cookie-Based** - Choosing this option will save portfolio contents based solely on browser cookies. This means that the portfolio contents will be specific to the computer, not the user; the contents cannot be made private and cannot be viewed on multiple computers.
- **Account-Based** - Choosing this option will make users to set up an account to use the portfolio. Only an email address and password are needed when creating an account.

## Show “Contact Me” option

Checking this box will allow some added options for the account-based portfolio. You will need to enter text in the “Comment” field; this text will appear below the email address and password fields when a user creates a portfolio account. In the example at the right, the phrase “Please have an Admissions Advisor contact me” is used.

Next, you can choose to enter email addresses in the “Portfolio Alert Email Address” field; when a user on the Gateway creates a portfolio account and requests to be contact, an email will be sent to all emails in this field.



The final checkbox to will enable the “First Name,” “Last Name,” and “Message” fields when a user requests contact. These fields will be optional, so users may still leave them blank.

# Portfolio Accounts Module

If you have enabled the Account-Based Portfolio, this module will let you track the accounts that have been created by users on your Gateway.

You can search for specific users by email address, refine the results based on a date range, or filter based on whether the user requested contact. By default, all users that have been active over the last month will be displayed. Choosing “Show only contact opt-in” will list only the users that have requested contact.

The search results will show the following information for each account:

### Gateway User Registrations

**Find a User**

Enter User Email Address: [Partial data okay for search.] Start Date: [MM/DD/YYYY] 08/02/2020 End Date: [MM/DD/YYYY] 09/02/2020

Show all.  Show only contact opt-out.  Show only contact opt-in.

- **Name** - the user’s name if they filled in the optional “First Name” and/or “Last Name” fields.
- **Email Address** - the email address used to create the account.
- **Message** - if the user entered a message, click the “Read Message” link to see the message in a tooltip; if no message was entered, the link will not appear.
- **Registration Date** - the date the user first created their account.
- **Last Logon** - the date the user last logged into their portfolio.
- **Contact** - Yes/No will appear here to indicate if the user requested contact.
- **Portfolio** - provides a link to view the portfolio contents of users that have requested contact.
- **Delete** - allows you to delete a portfolio account; there is no limit on the number of accounts available so you do not need to delete them.

[Export this report as a CSV file.](#)

Name	Email Address	Message	Registration Date	Last Logon	Contact	Portfolio	Delete
	<a href="mailto:msansolo@digarc.com">msansolo@digarc.com</a>		09/02/2020 03:28:06	09/02/2020 03:28:06	No		<a href="#">Delete</a>

## EXPORT

Click the “Export this report as a CSV file” link to download a file showing all the accounts listed in your search results. The exported document will contain all of the account information listed above with some minor differences.

A “User ID” column will appear; these numbers are auto-assigned by the Publisher. The “Contact” column will display a “0” for users that said no to contact and a “1” for users that said yes to contact.

	A	B	C	D	E	F	G	H
1	User ID	Name	Email Address	Message	Registration Date	Last Logon	Contact	Portfolio Contents
2	238		msansolo1@digarc.com		4/5/2017 9:37	4/5/2017 9:37	0	Review not allowed.
3	240		msansolo2@digarc.com		4/5/2017 9:40	4/5/2017 9:40	1	(Programs: Pre-Optometry)
4	242	Mara Sansolo	msansolo3@digarc.com	I am interested in the English program.	4/5/2017 9:41	4/5/2017 9:41	1	(Navigation Links: General Information)