

Q Search

## Importing Programs via IM



DIGARC Client Care  
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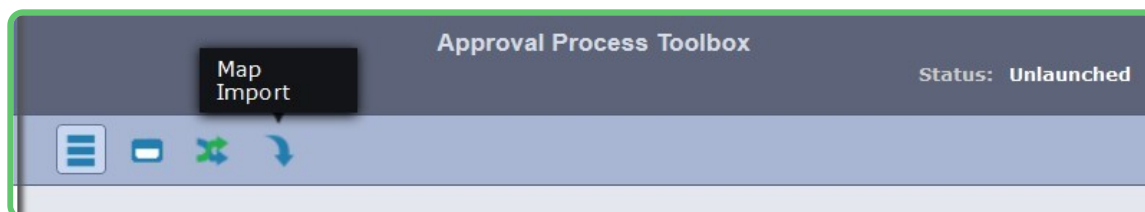
In order to import information, you'll need to **set up a Legend**, so that Acalog or Curriculog can get the information out of the DataStore to use within the system.

To accomplish this, you'll navigate to the Approval Processes module, and select the Approval Process you would like to enable for importing.

### Importing Programs into Curriculog

#### Importing Programs into Acalog

Before you begin setting up the Legend – make sure the form is exactly how you want it. Once a Legend is established, we strongly recommend against modifying the fields of the Approval Process any further as it may negatively impact the integration. Instead, we suggest making a copy of the Approval Process you'd like to modify, and deactivate the old one. All current Proposals will be able to complete their workflows, and any new ones will contain the new changes.



Legends

Within the Approval Process, navigate to the right-side of the screen where you'll see the "Map Import" icon.

Once you click the icon, you'll see the "Integration Manager Legends" screen, with a description of the Legends. A Legend will be used to connect this single Approval Process to the information currently housed in the DataStore, so that when a user creates a Proposal – they're able to import information.

To begin, click "Add Legends." A new window will appear, with the option to "Create New Legend." Once you've opted to create a new Legend, you'll be presented with a screen displaying two sets of options.

Reference	Destination
System: <input type="text" value="Select Reference System"/>	» <b>Curriculum</b>
Map: <input type="text" value="Select Map"/>	» <b>2017 Webinar - Program Changes</b>
	» Label : <input type="text"/>
	» <b>Type : Program</b>
Field: <input type="text" value="Please Select One"/>	» Hierarchy Owner
Field: <input type="text" value="Please Select One"/>	» Program Type
Field: <input type="text" value="Please Select One"/>	» Title *
Field: <input type="text" value="Please Select One"/>	» Description
Field: <input type="text" value="Please Select One"/>	» Prospective Curriculum
	» <b>Type : Core</b>
Field: <input type="text" value="Please Select One"/>	» Name *
Field: <input type="text" value="Please Select One"/>	» Code *
Field: <input type="text" value="Please Select One"/>	» Id
Field: <input type="text" value="Please Select One"/>	» Description
Field: <input type="text" value="Please Select One"/>	» Curriculum
Field: <input type="text" value="Please Select One"/>	» Status
	» <b>Type : Course</b>
Field: <input type="text" value="Please Select One"/>	» Prefix *
Field: <input type="text" value="Please Select One"/>	» Code *
Field: <input type="text" value="Please Select One"/>	» Name *
Field: <input type="text" value="Please Select One"/>	» Id
	» <b>Type : Custom Text</b>
Field: <input type="text" value="Please Select One"/>	» Name *
Field: <input type="text" value="Please Select One"/>	» Description
Field: <input type="text" value="Please Select One"/>	» Id
Field: <input type="text" value="Please Select One"/>	» Position
Field: <input type="text" value="Please Select One"/>	» Credits



On the left, will be the Reference System. This will be where the data is coming from – in our case Acaloa. On the right will be the Destination System. This will be where

in our case, Acalog. On the right, will be the Destination System. This will be where the data is moving into – in this case, Curriculog.

As we are working within a Program, you'll see that there are several more fields showing than are present within our form. Many of the fields will be auto-filled for you once the reference system is selected; but the next section will explain what each field points to within our form.

The information housed under the "Prospective Curriculum" field is used to populate the information that falls into the Cores and Courses information. When setting up the legend in Curriculog, the system will automatically map these for you when you select the related map.

The Legend will allow you to map on a one to one basis the Reference System to the Destination System. For example, you may choose to map "Name" in Acalog, to "Title" in Curriculog – so that the data appears within the expected field.

To begin, select the appropriate System from the drop-down menu – in this case, Acalog.

Then, select the Map from the drop-down menu that was previously created.

Reference	Destination
System: Acalog	» Curriculog
Map: IM Testing Catalog - VK - 2017	» 2017 Webinar - Program Changes
	» Label : <input type="text"/>
	» Type : Program
Field: Please Select One	» Hierarchy Owner
Field: Program Type	» Program Type
Field: Please Select One	» Title *
Field: Description	» Description
Field: Please Select One	» Prospective Curriculum
	» Type : Core
Field: Name	» Name *
Field: Code	» Code *
Field: Please Select One	» Id
Field: Description	» Description
Field: Curriculum	» Curriculum
Field: Status	» Status
	» Type : Course
Field: Prefix	» Prefix *
Field: Code	» Code *
Field: Name	» Name *
Field: Please Select One	» Id
	» Type : Custom Text
Field: Name	» Name *
Field: Description	» Description



Field:	Please Select One	» Id
Field:	Position	» Position
Field:	Credits	» Credits

Once these options have been selected, the system will attempt to match any fields that have an exact match in the title. You may notice that some fields match up immediately – this will happen when the field in Acalog is titled exactly the same as the field in Curriculog. Occasionally, you have a field that isn't an exact match in title – but still the correct location for the data.

“Hierarchy Owner” is a good example. In Acalog, the hierarchy information is stored in a field titled “Parent,” and will not automatically match for you. When this occurs, you can use the drop-down menu to select the appropriate field within Acalog to map the information. You do not need to map every field, either – there are many occasions where a field may exist in Acalog that you do not wish to import into Curriculog, and you can leave that field unselected.

When working with Programs – pay special attention to “Program Type” - both Acalog and Curriculog contain a field titled “Program Type.” However, they are used in two different ways. If they are allowed to auto-fill, Acalog will try to populate the field with information from your Item Types module – such as Major, or Minor – when Curriculog is expecting information to determine whether this information is a Program or a Shared Core. When this happens, the user may be confused as to why information is not importing into their proposal. This can be corrected by potentially renaming the Program Type field in Curriculog (common names are “Type of Program instead), which will prevent the auto-fill, or by manually adjusting the drop-down menu for Acalog back to “Please select one” and leaving it blank.

It is also extremely important to note the field “Prospective Curriculum.” This information will not match automatically, as the field in Acalog is titled “Curriculum”.



<b>Field:</b> Curriculum	» Prospective Curriculum
	» Type : Core
<b>Field:</b> Name	» Name *
<b>Field:</b> Code	» Code *
Field: Please Select One	» Id
<b>Field:</b> Description	» Description
<b>Field:</b> Curriculum	» Curriculum
<b>Field:</b> Status	» Status
	» Type : Course
<b>Field:</b> Prefix	» Prefix *
<b>Field:</b> Code	» Code *
<b>Field:</b> Name	» Name *
Field: Please Select One	» Id
	» Type : Custom Text
<b>Field:</b> Name	» Name *
<b>Field:</b> Description	» Description
Field: Please Select One	» Id
<b>Field:</b> Position	» Position
<b>Field:</b> Credits	» Credits

This field is necessary as it contains all of the information regarding Cores, Courses, and Ad-Hoc text that will be brought in from Acalog. If you do not provide correct information in the Legend, you will not be able to import Courses into your Programs.

Additionally, once you have provided the Curriculum field – the information under the Core, Course, and Custom Text headings will now also be able to auto-fill.

Once you have matched all the fields you wish to import, click “Save Legend” and close the window.

**Warning: Edits may affect Integration**

This Curriculog system has Integration Manager enabled. Modifications to the Approval Process will render any maps and legends associated with this Approval Process invalid and may affect integration between Curriculog and other applications. It is better to make a copy of this Approval Process and make your changes there. If you are unsure of the meaning of this message, please contact Digarc Customer Care first.



Once saved, you will notice the orange-shaded warning that now appears over your

Approval Process – indicating that further modifications may impact the Integration. This will serve as a reminder that once a Legend is established, we strongly recommend against modifying the fields of the Approval Process any further as it may negatively impact the integration. Instead, we suggest making a copy of the Approval Process you'd like to modify, and deactivate the old one. All current Proposals will be able to complete their workflows, and any new ones will contain the new changes.

## Importing into a Proposal

At this stage, the Approval Process can be launched, and users can begin using this form to create Proposals. When the user begins a new Proposal, they will have the **Import icon** available in the **upper left corner** of the screen, above the form. Before they can select it, they must choose the Program Type – indicating if this will be a **Program or a Shared Core**, as this indicates to Integration Manager where it will look for the information.

When users select it, then choose the import icon, the Integration Manager window will appear and allow them to **choose from any available Legends**, and **select a Program to import**. Programs will be **sorted by name** when appearing in search results.

### Filter Programs

Search all programs

Or add filter

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Start Date:  End Date:  Sort Results By:

Exclude previously imported items

### Search Results (1 to 20 of 169)

Accounting B.B.A.
Accounting Minor
AgriBusiness B.A.
AgriBusiness B.S.

A blue square button containing a white upward-pointing arrow, located at the bottom right of the page.

Users can narrow results by choosing options from the “Filter by Field” option and entering criteria. Note that the search will not find results unless the **keywords are an exact match**. (For example, “Accounting” will not return any programs that begin with “Accounting”, such as Accounting B.B.A. or Accounting Minor).

When the user selects a Program to import, the next screen will display a preview of the data being imported from Acalog. **Users can not change which field data imports into, but they can choose not to import fields by removing the associated checkbox.**

Field Name	Data Preview	Import Field
» General Catalog Information: Hierarchy Owner	Accounting, Economics, Finance	<input checked="" type="checkbox"/>
» General Catalog Information: Title	Accounting B.B.A.	<input checked="" type="checkbox"/>
» General Catalog Information: Description	Competencies In addition to those in the common body of knowledge of business, students majoring in accounting will achieve competency in internal control systems, managerial accounting, income tax ac...	<input checked="" type="checkbox"/>
» General Catalog Information: Prospective Curriculum	Program has 14 cores and 45 courses.	<input checked="" type="checkbox"/>

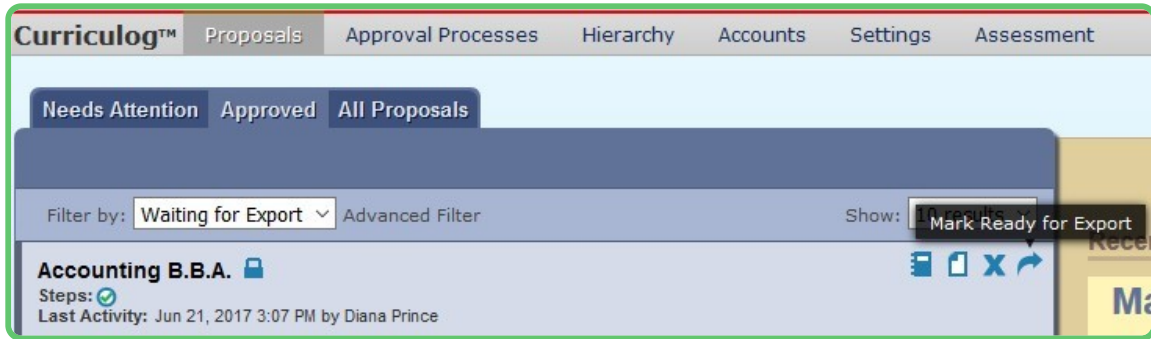
When the user selects to import a **Course**, all of the data shown in the preview will be placed in the appropriate fields within the form. Note that the **“Prospective Curriculum” section will be abbreviated** – listing the number of **Cores and Courses** that will be imported, rather than previewing the data. The details will be displayed for the user after the import is completed.

At this point, users need to be informed that they should only ensure required fields contain data, but **not to modify any of the information being brought it. It may be helpful to place this information in the form using a “New Text” field.** User Tracking within Curriculog does not begin until the first step in the workflow, so changes to the data at this point are not tracked. Once all required fields contain data, the user can Launch the Proposal, to send it into the workflow. Proposals will progress through their workflow until they reach the final step and are completed.

## Mark Ready for Export

Once a Proposal has been completed, you will need to navigate to your Administrator Dashboard, then to the Proposals module, and the Approved tab. All completed proposals will be listed here, and you will need to **mark them as “Ready for Export.”** To mark them, select the blue arrow icon to the far right of the proposal you wish to mark.





Once it is marked Ready for Export, the proposal has ended its path within Curriculog – and now it is time to move the information back into Acalog.

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