SmartCatalog

Departmental User's Guide

for

The University of Idaho

1. Introduction

Welcome to SmartCatalog at the University of Idaho. This guide is intended to instruct you on how to make your edits in the General Catalog with a minimum of confusion and mess. The process of editing material in the catalog isn't technically difficult, but it does require you be thorough and thoughtful in your approach.

If you still have questions after reading through this guide call the Office of the Registrar and ask to speak with the Academic Publications Editor. That position is charged with maintaining the SmartCatalog system here at the UI and handles the production and publication of the General Catalog.

Steps for making changes in Author-it

1. Login into Author-it using your remote desktop connection (section 2).
2. Locate and open the item(s) you wish to modify (section 3 and 4).
3. Make you changes (section 5).
4. Set up any hyperlinks (section 6).
5. Set your release state, save and close you item (section 7).

2. Getting into SmartCatalog

First things first; to get into the SmartCatalog system you must have been given a user ID and two passwords from the Academic Publications Editor in the Office of the Registrar. This system is not connected to your Active Directory account here at the UI; the user ID and password will be unique to the SmartCatalog system. Why two passwords? The first is a common password used to gain access to the remote server and the second is a unique password to get into Author-it where you will make your changes. The typical login will be the first letter of your name and your last name together. So Joe Vandal will likely have a login of jvandal. Your password will have been sent to you from the Academic Publications Editor.

To get into the SmartCatalog and into Author-it to make changes follow these steps:

Note: If you are a Macintosh User skip to Section 8 before continuing.

1. Open the Remote Desktop Connection application on your computer. This is often found under accessories on the Windows OS.
2. Input the following address: 74.205.81.89 and click on Connect.
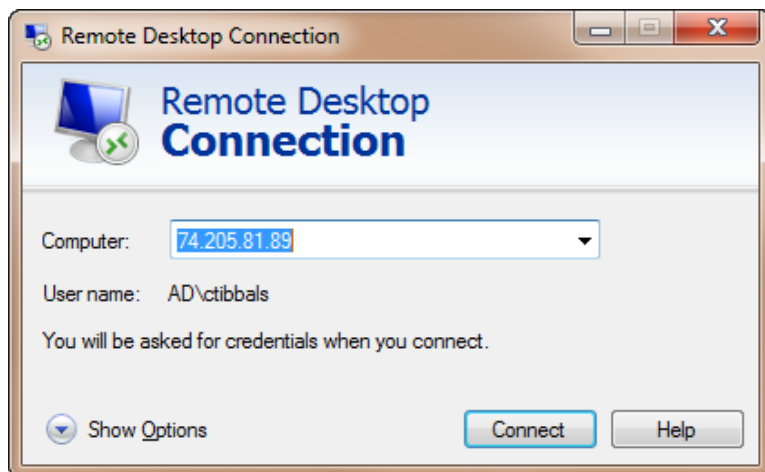
3. If you get the below prompt click on Yes to proceed.
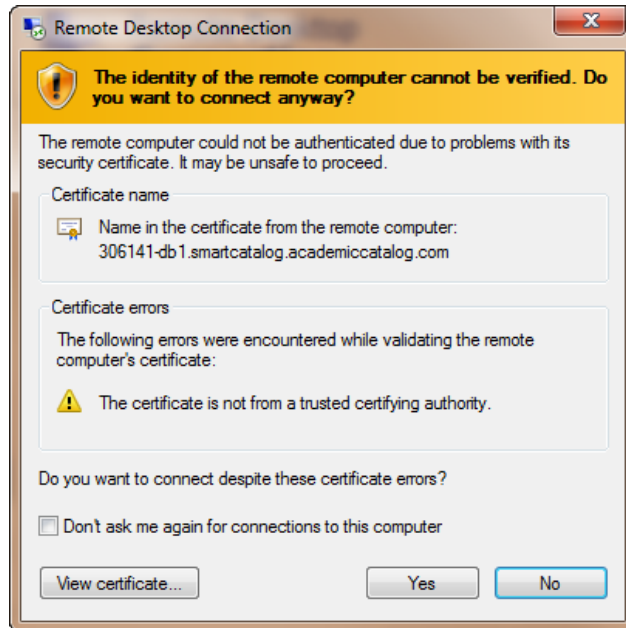
4. The following screen will prompt you for your security credentials but, it will default to your University of Idaho Active Directory user name which you do not want to use.
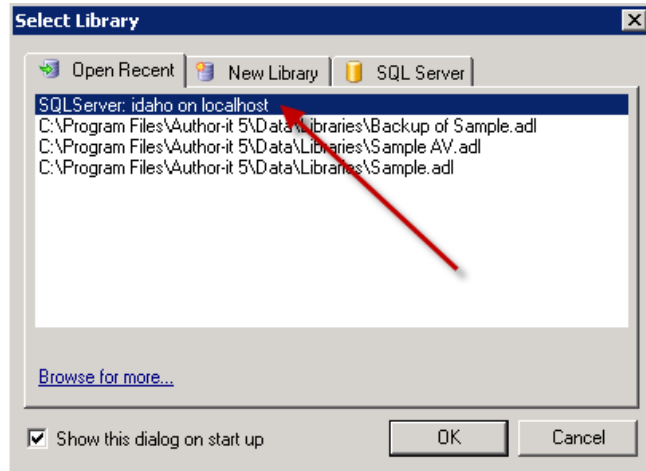

5. Click on "Use another account" then enter your user name and password that you were given by the Academic Publications Editor. This will be the first password you were given to log into the server.
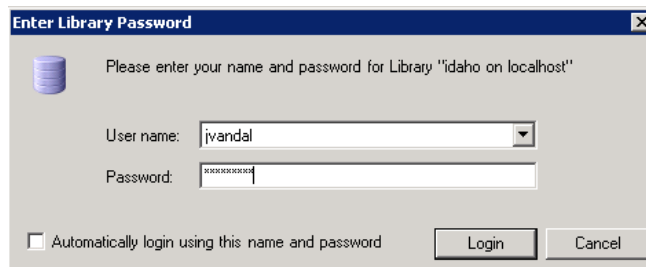
6. Select the "Idaho on Localhost" library.

7. Your user name will automatically be filled in, but now you will need to enter your second password. This will get you into Author-it. Note: if anyone else will be using your computer to log into Smartcatalog do NOT check the box labeled "Automatically login using this name and password."

8. This is what you should see when you successfully log in:
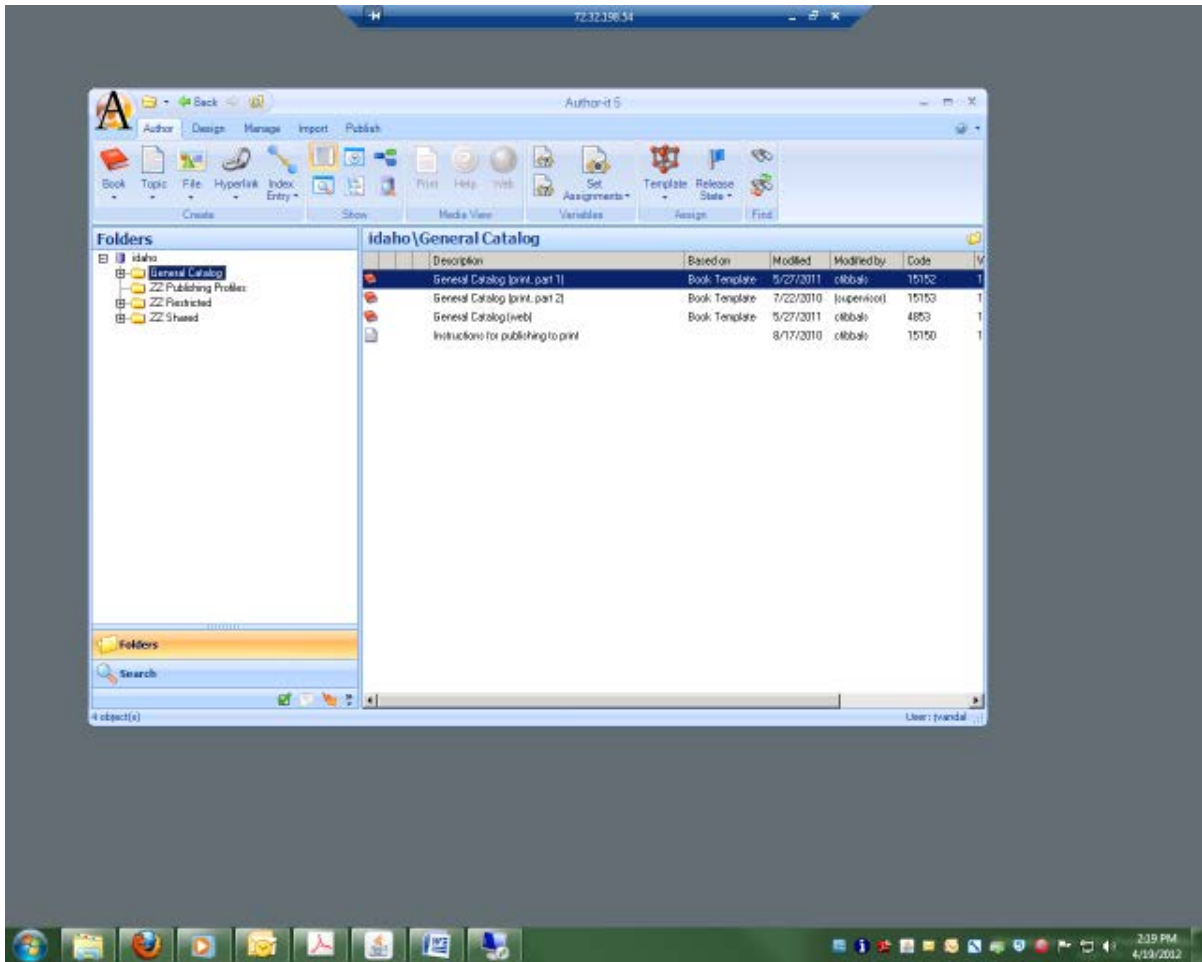
9. Congratulations, you have successfully logged into the SmartCatalog system.

3. Navigating and Finding Things

You're into the catalog now, so the question is where do you find what you're looking for? Author-it provides three different ways to find what you want. All three methods work very well although each method works a little different from each other.

Method 1: Mouse/Manual navigation. Here I have used my mouse cursor to click on one of the + symbols (red arrow) to expand the General Catalog directory which contains the files that make up the catalog. Each department and group of courses has its own directory while some sections of the catalog are grouped together (yellow markers).
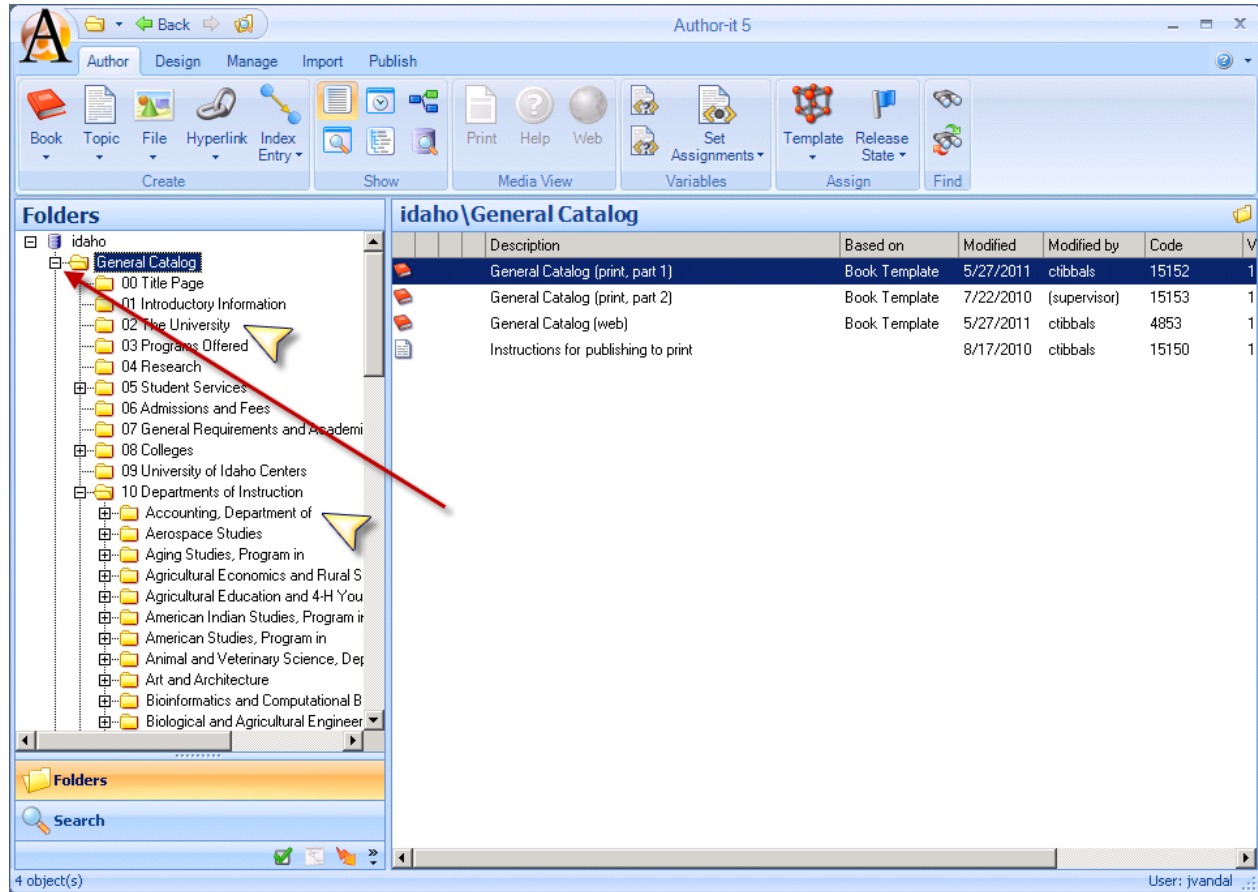
I can continue to manually navigate into directories and find what I am looking for. In the right pane of your window you can see the files that fill each folder of the catalog. Below is an example of the contents of the University of Idaho Centers folder. I will explain later how to interact with the items in the folders, but for now know that is where actual "files" of the catalog are.

Method 2: Search Function. The search function will allow you to search for items by their title name or name in the header. Often this will get you the item you want, but if you are looking for a specific piece of text in a file, this method will not usually work. To use the search function click on the search button in the lower left corner of the screen (identified in the picture with the red arrow).

The search function is a robust tool for locating specific items in the catalog. You can use many different sets of criteria to focus your search to retrieve specific portions of the catalog. Or you can just as easily type in what you are looking for and Author-it will usually do a pretty decent job of finding what you are looking for, although sometimes you get a bit more than you wanted.

You can use any number of the fields to narrow your search results if you desire. In most cases users will just type in what they are looking for and see what comes out on the other end.


To execute the search click on the Find Now button in the lower right side of the search pane. The results of your search will appear in the right pane just as it would if you were manually navigating through folders.

|			Description	Based on	Modified	Modified by	Code	Version
			Accounting	Book Template	2/16/2011	ctibbals	15161	1
			Accounting Courses	Book Template	12/20/2010	ctibbals	4918	1
			Department of Accounting	Book Template	3/29/2011	ctibbals	9832	1
			Acct 201 Introduction to Financial Accounting (3 cr)	courselink	7/16/2010	SmartCatalog 1	11842	1
			Acct 202 Introduction to Managerial Accounting (3 cr)	courselink	7/16/2010	SmartCatalog 1	11843	1
			Acct 305 Accounting Information Systems (3 cr)	courselink	7/16/2010	SmartCatalog 1	11839	1
			Acct 310 Accounting for Business Decisions I (2 cr)	courselink	7/16/2010	SmartCatalog 1	11840	1
			Acct 315 Intermediate Financial Accounting I (3 cr)	courselink	7/16/2010	SmartCatalog 1	11834	1
			Acct 385 Cost and Management Accounting (3 cr)	courselink	7/16/2010	SmartCatalog 1	11835	1
			Acct 414 Intermediate Financial Accounting II (3 cr)	courselink	7/16/2010	SmartCatalog 1	12117	1

Method 3: The Find Function. The find function will search for specific text within the catalog files. Be careful though since the search is "literal". So consider the number of spaces you put in between; before or after words; the punctuation, etc. To open the find function press CTRL+F or click on the binoculars button at the top of your screen.


This is what you will see pop up in a separate window:
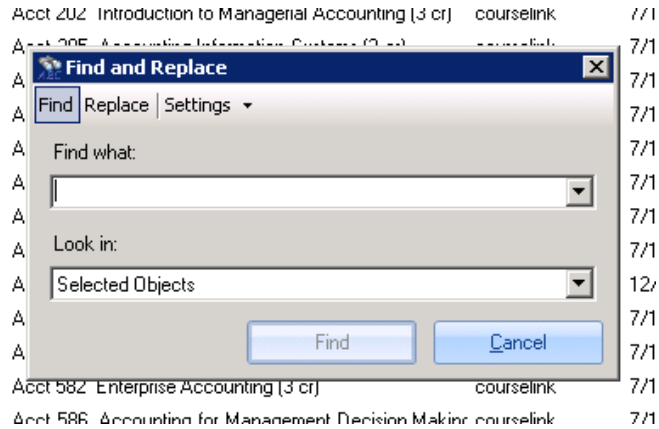
To use the find function type in the keyword(s) you are looking for. Before you press the Find button though click on the "Look in:" box drop down arrow and select Library. Now click on the Find button.
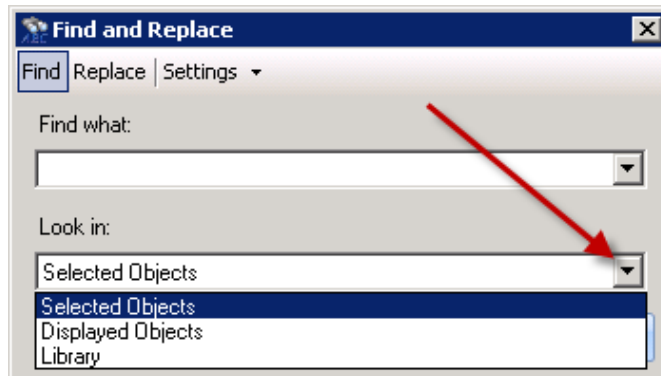
Unlike the search function, the find function will open each item in sequence and show you the text. In the upper right corner of the find box it will show you how many items contain the text you looked for. Clicking on Find button again will advance you to the next occurrence of your keyword(s) within the open item or it will advance to next item.
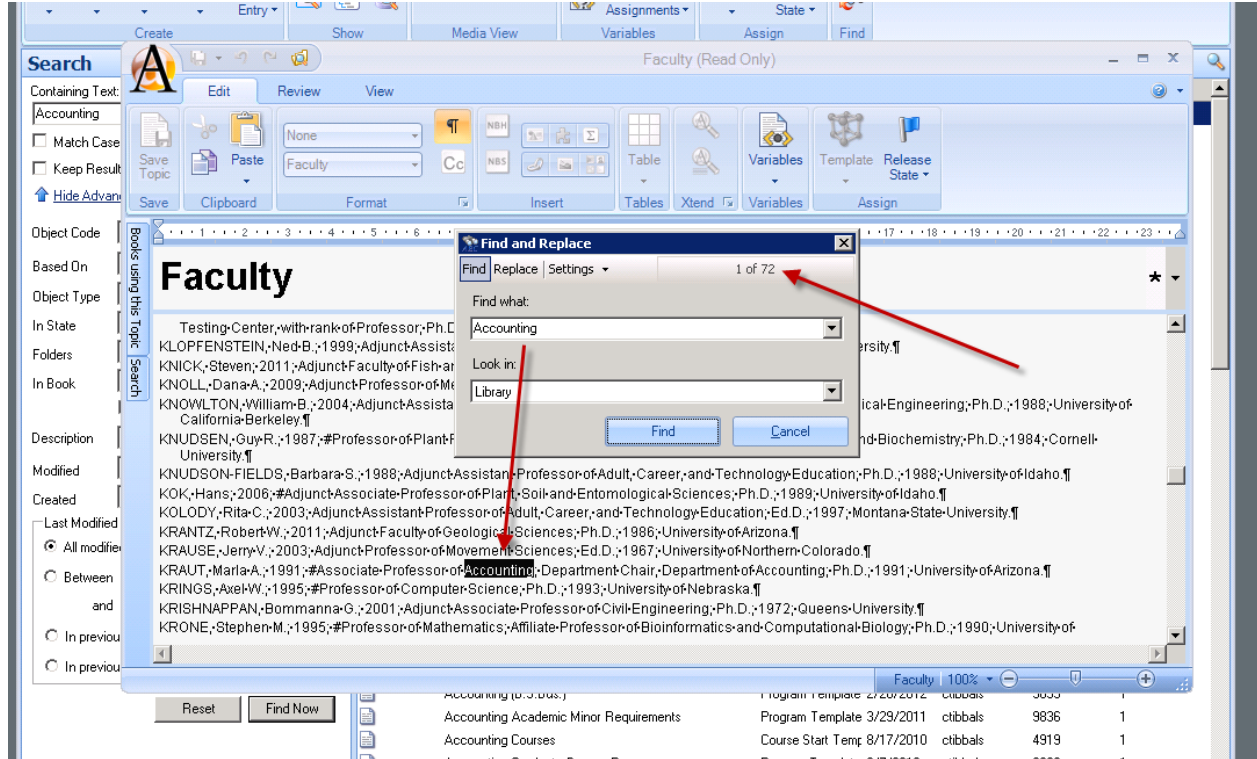
4. Files in the Catalog

So you've found the file(s) you are looking for. So which items do I open, how do I open them, and do I need to care about all the rest of the stuff here? First let's talk about what you are looking at. In the most general terms we refer to items in the catalog as objects. There are multiple types of objects, but only three that you will interact with. These are:

This is the symbol for a topic object. These objects make up the vast majority of the catalog and are what you will most often work with. Think of it as a page or a couple pages out of a book on a specific topic.

This is the symbol for a book object. The book object is used primarily by the primary catalog editor. They are used to organize the topics in the catalog in the order you wish to have them published. If the topic objects are the pages, then this is the binding that holds the pages together in order.

This is the symbol for a hyperlink object. These are object representations of links you create to other websites or other locations within the catalog. See section 6 on how to create and use these.

Opening any of these items is as simple as double clicking on the object. Once you do this a new window will open on your screen. In the image on the next page I have opened a topic object. Something I would like to draw attention to is the circled lock symbol to the left of the title of the object I opened. This symbol indicates that the object is opened for editing by someone. This prevents two people from accidently working within the same object and unwittingly overriding the other's edits. See the image on the next page.

Warning: Every so often an object will remain locked even after you have exited from the object; if this appears to be the case contact the Academic Publications Editor who can force the system to close the item for you.
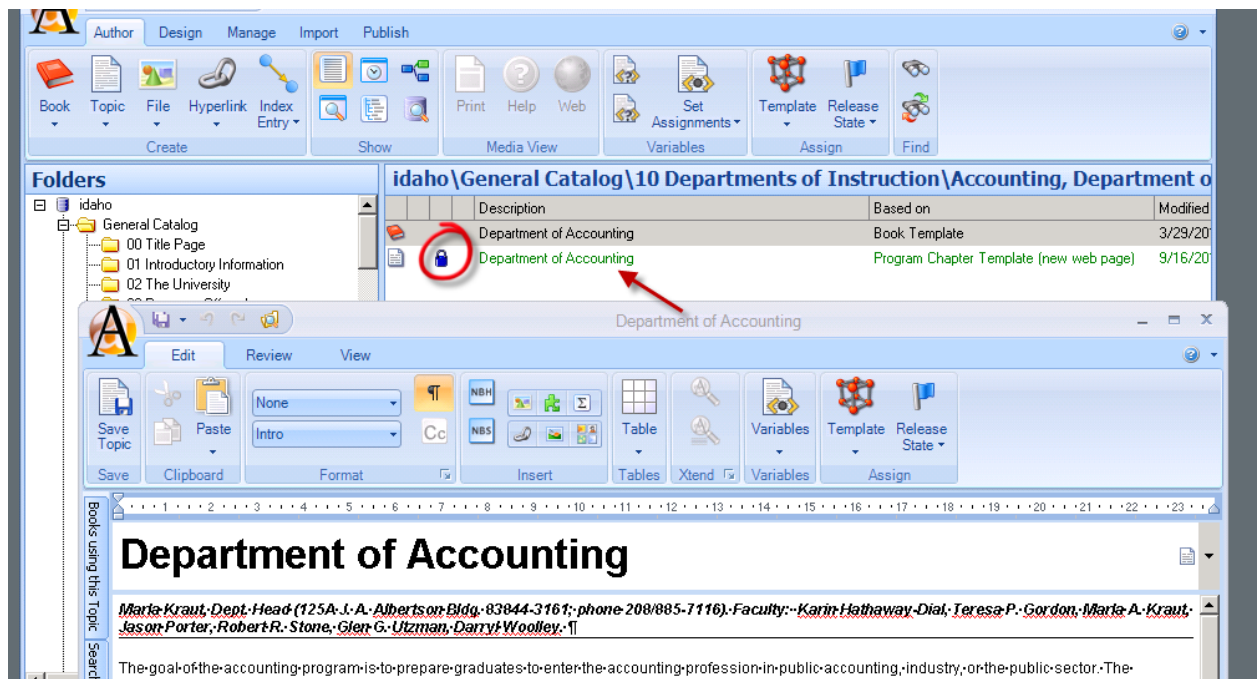
Since you will work primarily within topic objects the above screen is the one you will see most often. You can also view your topic by double clicking on the related book object that contains your topic object. As a general rule the book object(s) in your folder will contain the topic objects within that same folder.
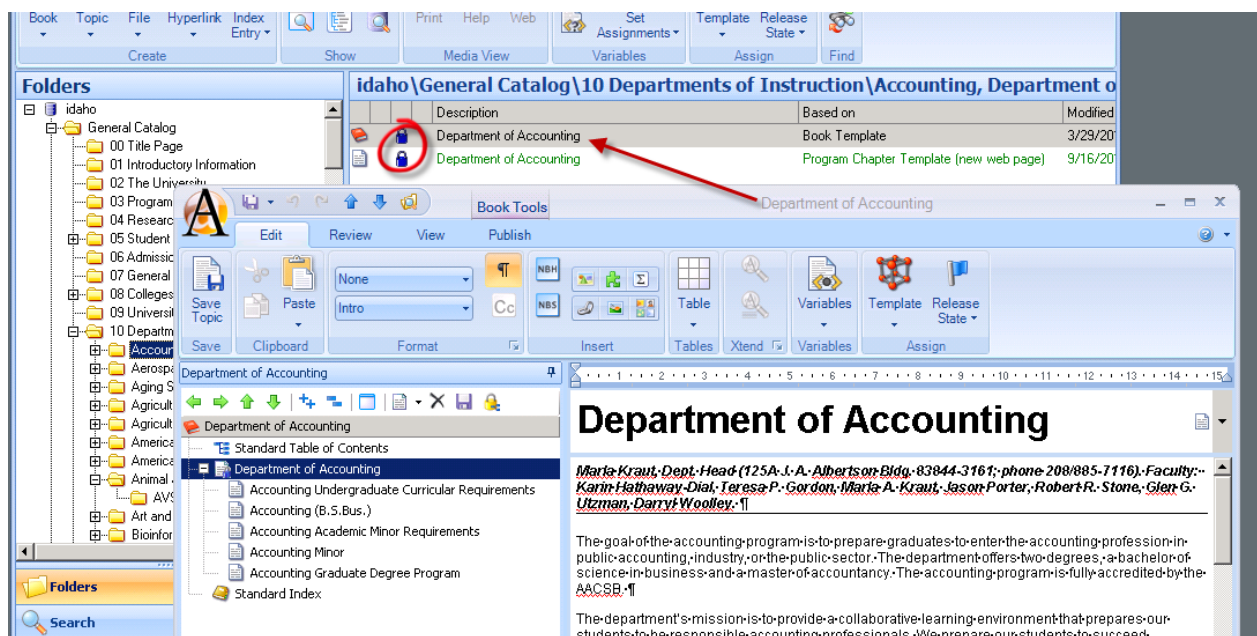
You'll notice that between opening just the topic object and the book object; the opened windows look a fair amount alike. You'll also notice that the book object has been locked as has the Department of Accounting topic object. This is because you are actually opening that topic object though the book which appears in the right pane of the newly opened window. You can open each topic in the book by double clicking on the appropriate topic object in the left pane.

5. How do I make changes and why can't I edit anything I want?

Now that your object is open its time to make some changes to it. First off, you have to have permission to edit a given object. If you do not have access to edit the object then "(Read Only)" will appear in the header of the window.
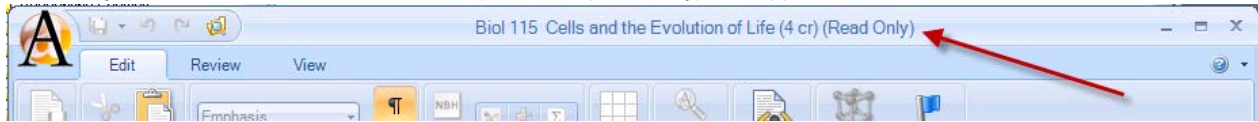
If you feel you should have permission to edit the object you have open contact the primary catalog editor for assistance.

Assuming you have permission to edit the object you have open you can now make your desired corrections, changes, deletions, additions, etc. To make changes in the text, just click where you want your cursor to be then start typing/deleting what you want to change, just like you would with any other document or email. It really is that easy when you are just making changes to the text.

Before I explain how to make larger changes such as replacing whole sections of text or creating lists I want to draw attention to two boxes at the top of the object window you have open. These two boxes are the Paragraph Style (red arrow) and the Character Style (green arrow)
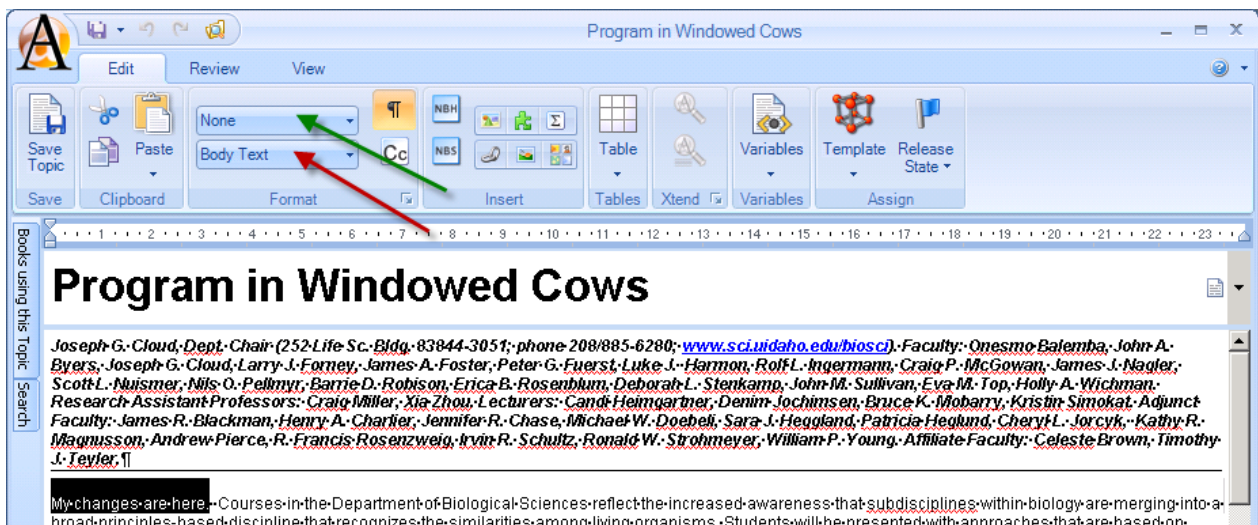
In the above example the character style (green arrow) is None, meaning no style has been selected. This is OK as character styles are not required. A character style is used to add bold to a word, add italics, underlining, etc. The paragraph style (red arrow) is Body Text and a paragraph style must always be selected.

A paragraph style controls how the text will be spaced, font size, font type, etc. If you are just making edits within existing text, the paragraph style will stay the same and you don't need to worry about it. If you cut and paste in text that replaces a paragraph you will often have to choose a paragraph style. Author-it will not let you save your changes until a paragraph style has been selected for each paragraph.
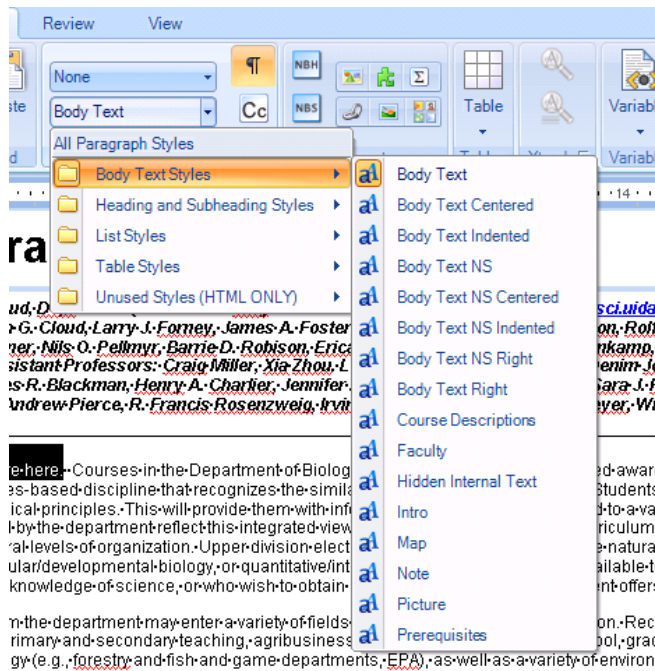
There are many different paragraph styles you can use. The majority of your text will likely be the Body Text style (shown above). If you wanted to make a list you would use one of the styles in the List Styles folder. You can experiment a little with the different list styles to find one that looks the way you want it too.

Having so many different styles can seem daunting, but it's really pretty easy to deal with. If you are uncertain which style to use, just look at other surrounding paragraphs and see what style is being used for them and choose that style. You can also open up other topic objects and look to see what style they are using (click on the paragraph you want to see and the paragraph style will appear above, although it'll be grayed out since you cannot change it.

If you are still stumped on what style to use then contact the primary catalog editor in the Office of the Registrar for assistance in choosing the appropriate style.

6. Creating Hyperlinks

Creating and using hyperlinks is a great way to give a reader quick access to an email address, access to a different website, or direction to another section of the catalog. A hyperlink object can be opened like any other object by double clicking on it.
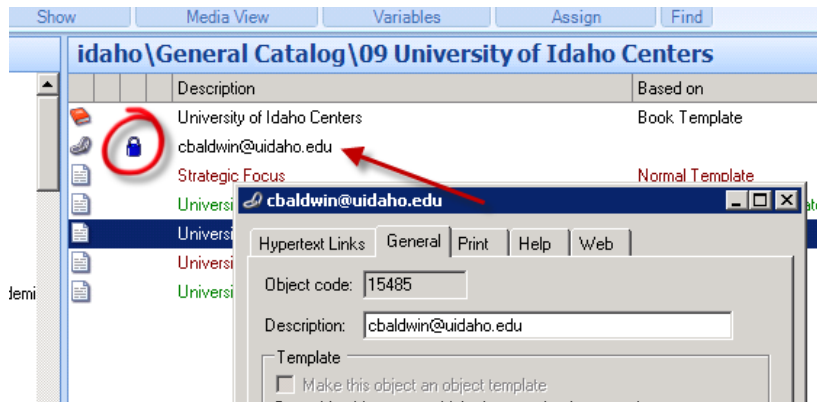
Once again I will draw attention to the lock symbol circled in red. Like any other object you open in Author-it when it is open it cannot be edited by another user.

When you need to use a hyperlink follow these instructions. Often many hyperlink objects have already been created for you so if it's already been done you don't have to create anything new.
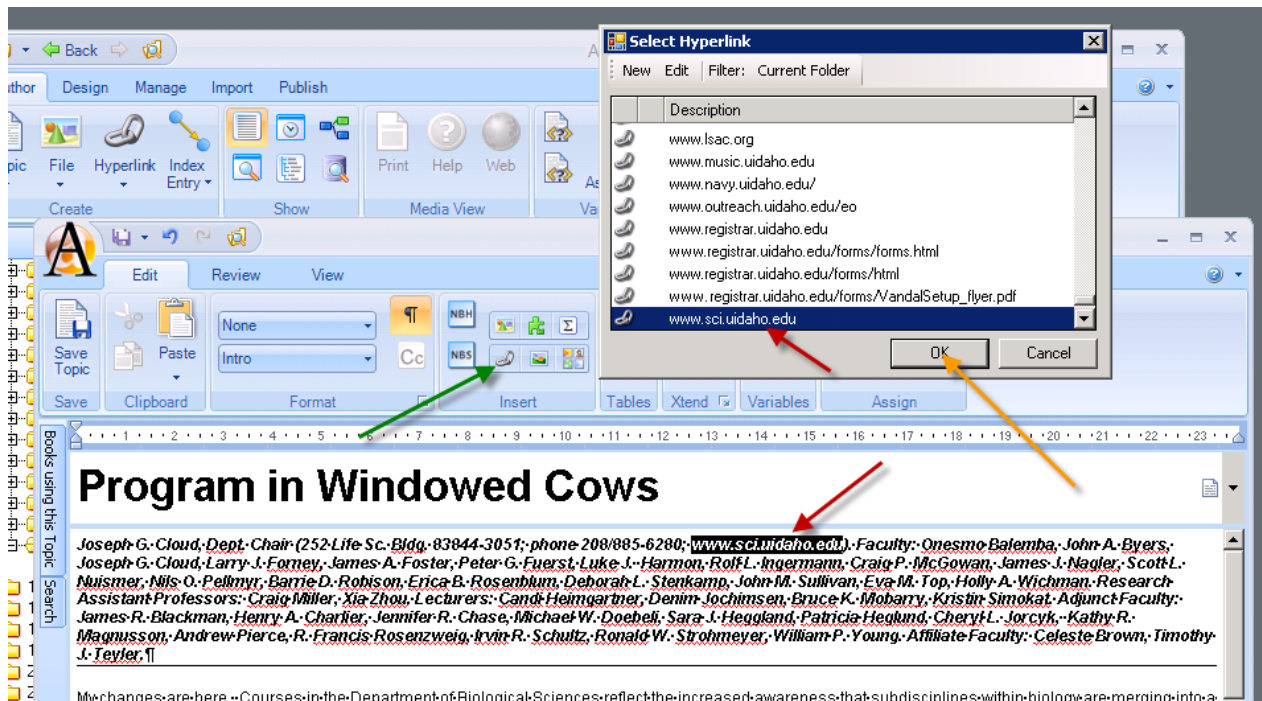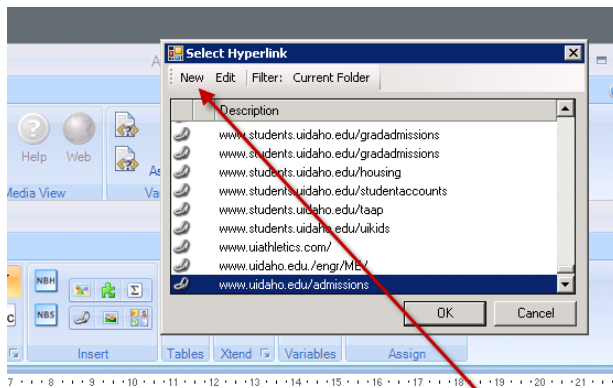
In the above example I have highlighted the text I want to create a hyperlink for: www.sci.uidaho.edu. Once I highlighted the text I clicked on the hyperlink button (green arrow) which opened the Select Hyperlink dialogue box. The system will attempt to locate the hyperlink object you want based on the name of the hyperlink. So in this case it found the hyperlink I wanted. Select the hyperlink you want and click on OK (orange arrow). Congratulations you've just inserted a hyperlink.

In some cases you will need to create a hyperlink that doesn't exist. There are three kinds of links and I will give a step-by-step set of instructions for each type.

Type 1: Web Address Hyperlink: This is the type of hyperlink you will use when you want to create a link to another website.

1. As above highlight the text you want to use to create the link and click on the hyperlink button (see above).

My desired link does not yet exist so I must create a new link. Click on New in the upper left corner of the Select Hyperlink dialogue box.

2. First enter the text of your hyperlink into the description box on the General Tab. Then click on the Hypertext Links tab.
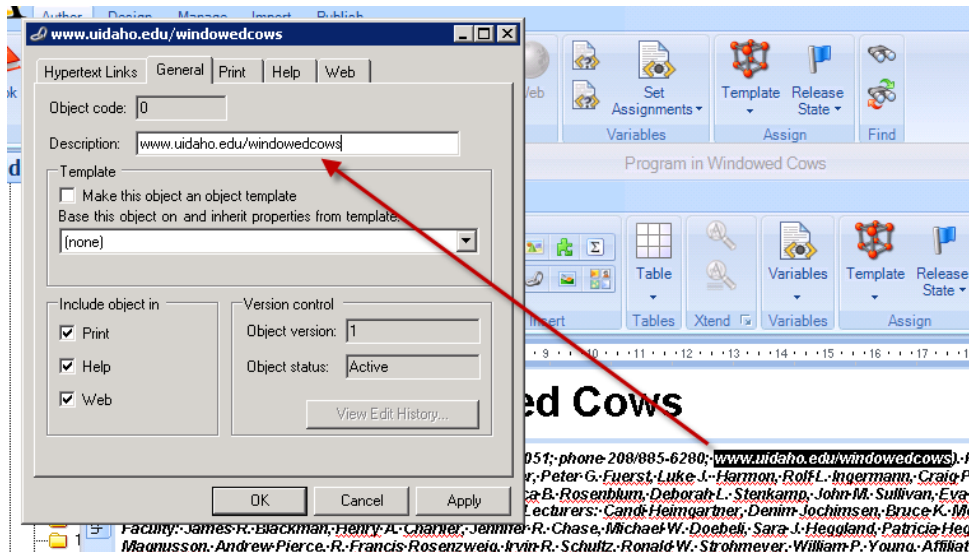
3. Since you want to create a new web address hyperlink click on the lower of the two Add Buttons (green arrow). Now enter your web address into the lower left hand box (red arrow). The "http://" will automatically be filled in for you so just add your address. When you are done click on OK (orange arrow).
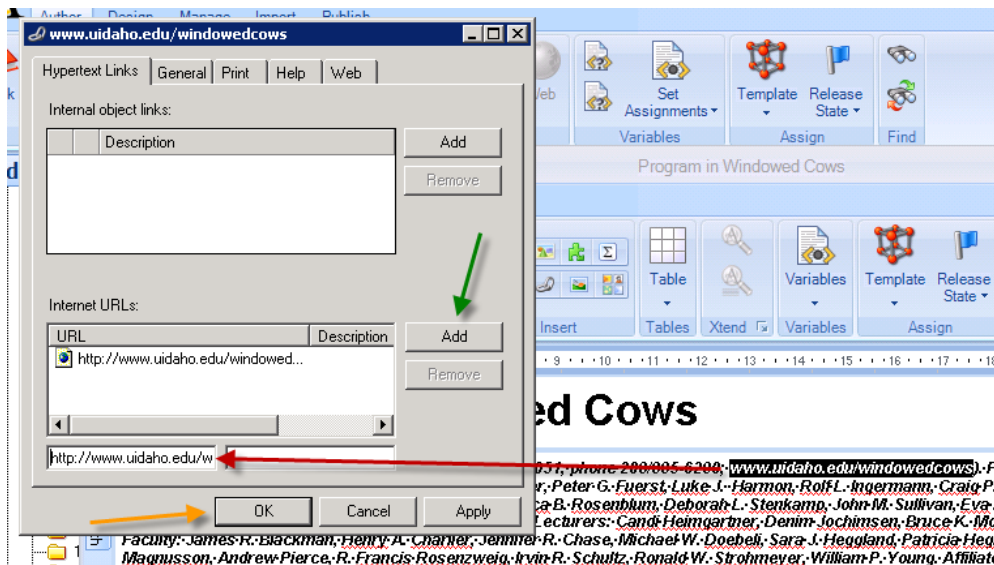
4. Congratulations you have created a brand new Hyperlink Object.

<u>Type 2: Email Address Hyperlink:</u> This is the type of hyperlink you will use when you want to create a link to generate an email for a specified recipient.

1. As above highlight the text you want to use to create the link and click on the hyperlink button (see pg. 11).
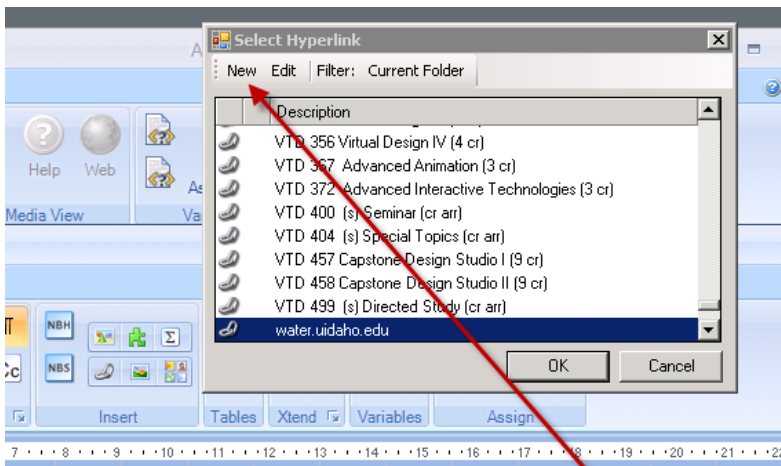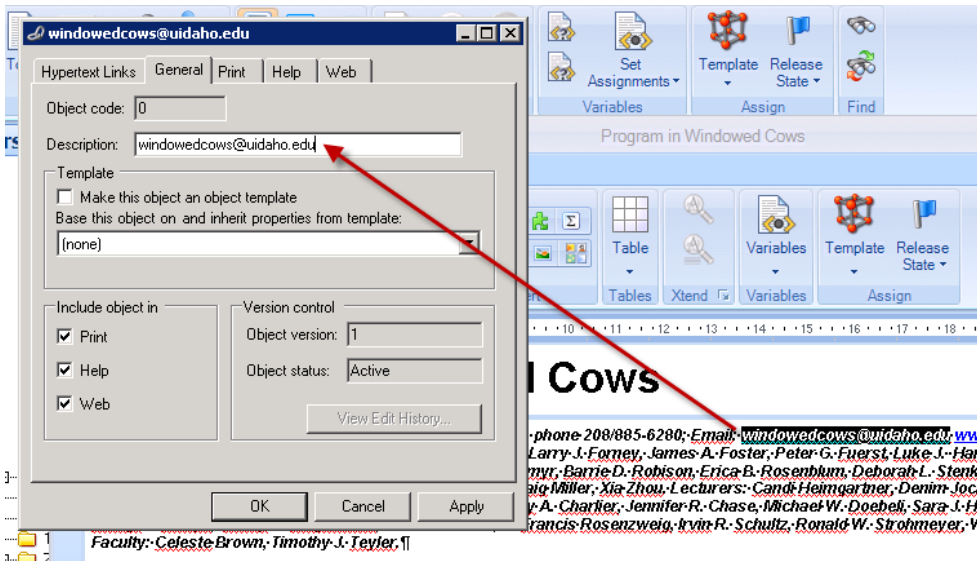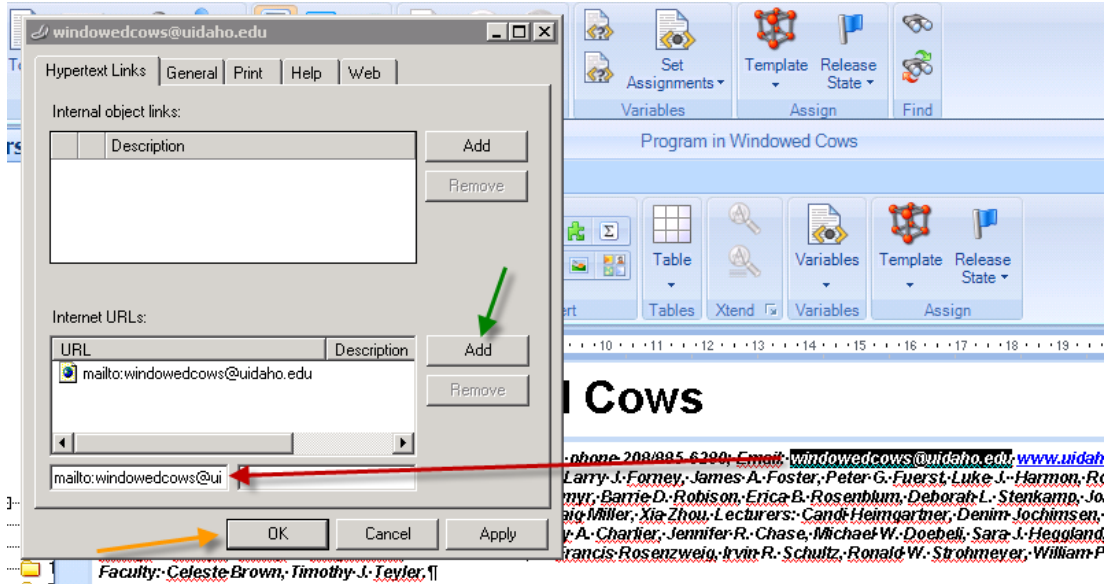
My desired email address does not exist so I must create a new one. Click on New in the upper left corner of the Select Hyperlink dialogue box.

2. First enter the text of your hyperlink into the description box on the General Tab. Then click on the Hypertext Links tab.

3. Since you want to create a new email hyperlink click on the lower of the two Add Buttons (green arrow). In the lower left hand box (red arrow) delete the "http://" that automatically appears and replace it with "mailto:". Now enter your desired email address. When you are done click on OK (orange arrow).
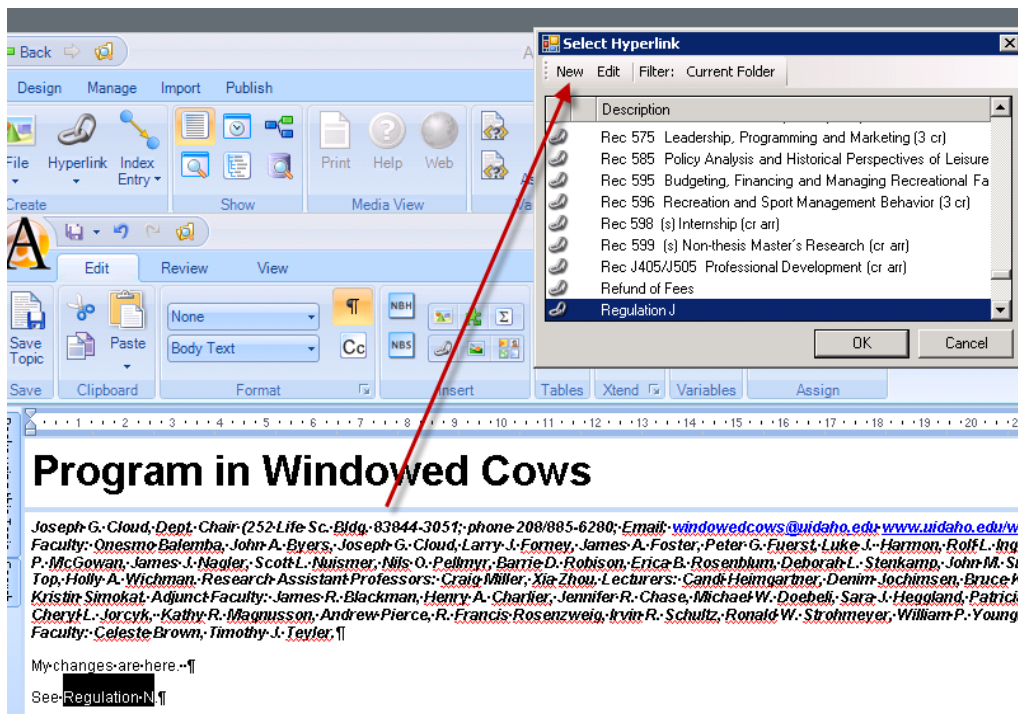

4. Congratulations you have created a brand new Hyperlink Object.


Type 3: Inter-catalog Hyperlink: This is the type of hyperlink you will use when you want to create a link to another section of the catalog.

1. As above highlight the text you want to use to create the link and click on the hyperlink button (see pg. 11).

My desired inter-catalog link does not exist so I must create a new one. Click on New in the upper left corner of the Select Hyperlink dialogue box.

2. First enter the text of your hyperlink into the description box on the General Tab. Then click on the Hypertext Links tab.
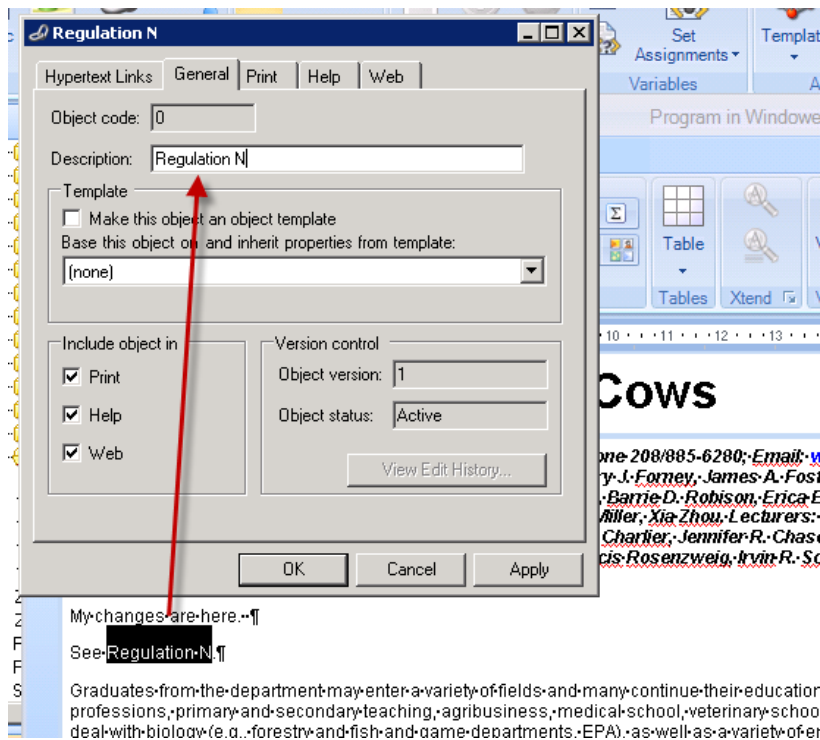

3. Since you want to create a new inter-catalog hyperlink click on the upper of the two Add Buttons (green arrow).
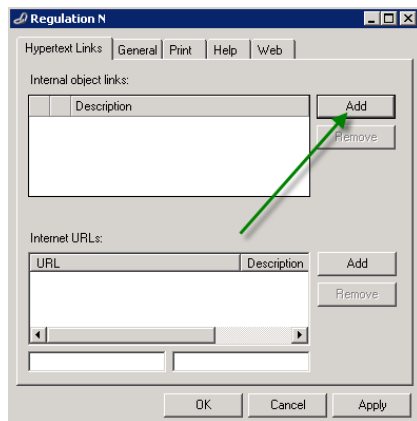
4. This will open up a new dialogue box. Unfortunately at this point you must know where the item is you are looking for in the catalog amongst the folder structure of the catalog. If you run into trouble with this step contact the primary catalog editor for assistance. Once you locate the particular item in the catalog you are looking for left click on it to highlight it then click on the OK Button (orange arrow).
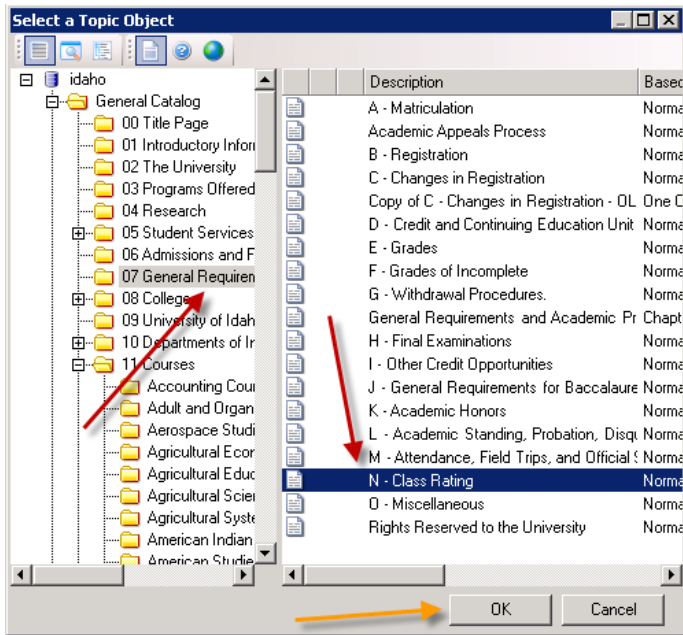
5. You will now be returned to the Hyperlink Object dialogue box. Click on the OK Button again to complete this process.
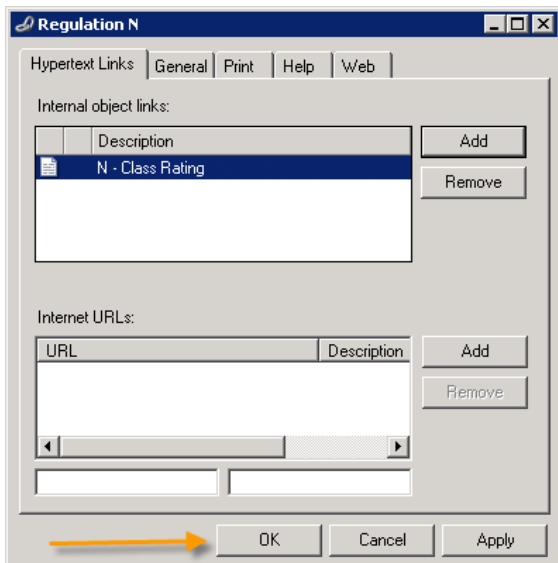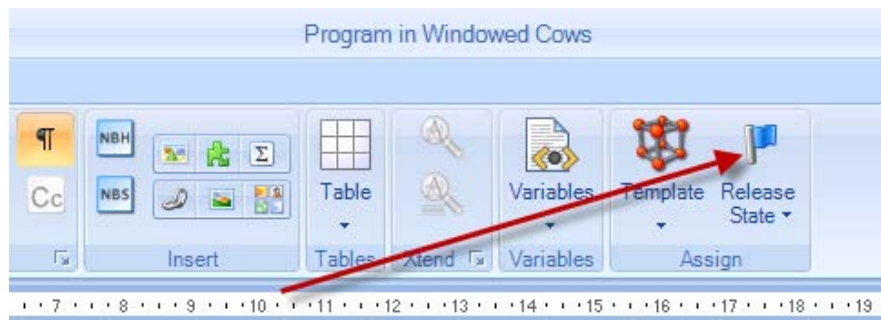

6. Congratulations you have created a brand new Hyperlink Object.
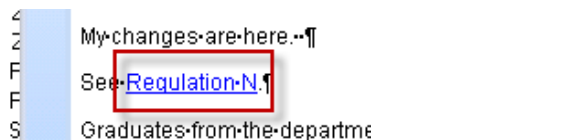
7. Release states

Once you have made your changes, created your hyperlinks, gotten everything the way you want it, or just where you want to stop for the day you must set a Release State for the item you've been working on. What is a Release State?

A Release State is a "flag" that you attached to your item that you made changes too. It signals to the primary catalog editor that you have reached a particular milestone for your item that may or may not require their attention. The primary purpose is to notify the catalog editor that you have finished making changes to the item and are ready for it to be reviewed for inclusion in the next General Catalog.

There are 6 release states: Approved by Catalog Editor, Approved by College/Department, Draft, Needs Review, Returned for Corrections, and To be Deleted.
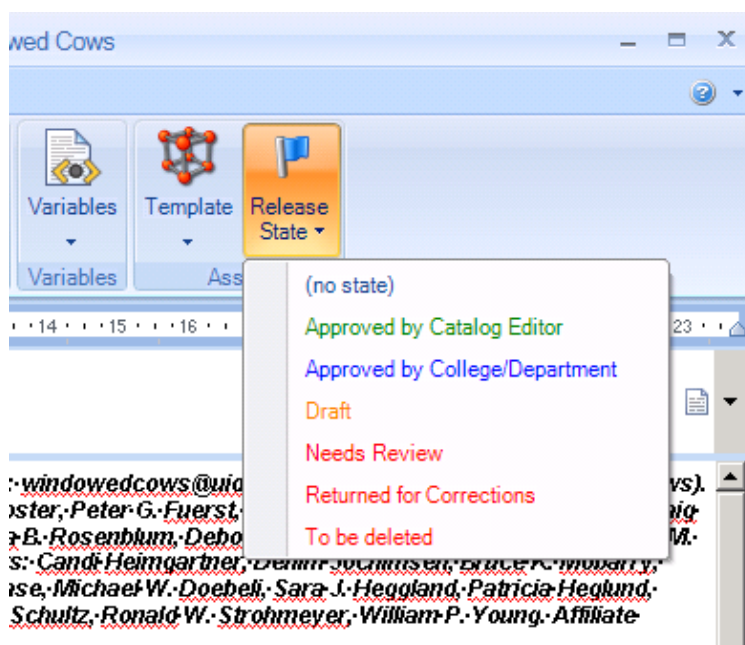
Approved by Catalog Editor – this state is used by the catalog editor to note the item has been reviewed and approved for inclusion in the next General Catalog.

Approved by College/Department – this state is used to signify that you as the departmental/unit editor have completed your edits and they have been approved by the department/college/unit in charge of that section of the General Catalog.

Draft – this state is used to signify that you are in the process of making edits, awaiting approval from someone in your department/unit, or that you have not finished making your changes.

Need Review – this state is what the item will be in when you first have access to it each year. It is awaiting your review.

Returned for Corrections – this state is set by the catalog editor when an item needs additional revision by the department before it can be accepted. The editor will usually follow this up with an email or phone call explaining what needs to be done.

To be deleted – this state can be used by the department/college/unit editor when they wish to indicate that they have one or more items they wish removed from the catalog. The catalog editor is the only person who can permanently remove items from the catalog.

To set a release state left click on the Release State button then left click on the state you wish to set for the item. It's as simple as that. Finally save your item (red arrow) one last time then close the item (green arrow).
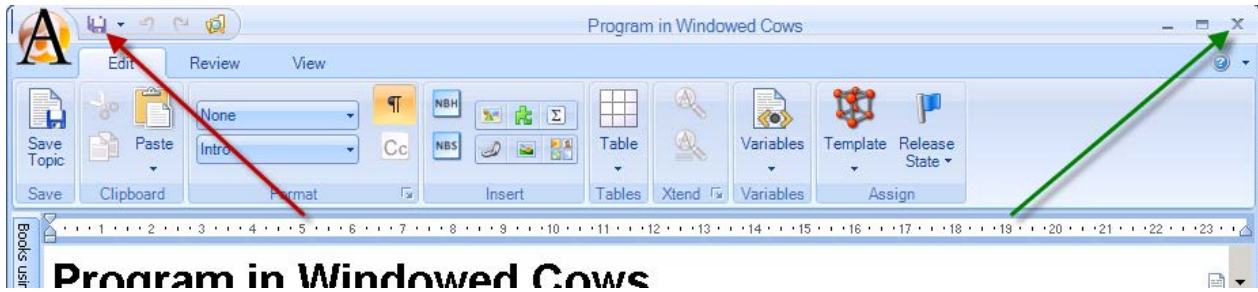
To exit from Author-it close all the windows by clicking on the "X" in the upper right corner of the window. Your remote desktop connection will terminate after a few seconds.
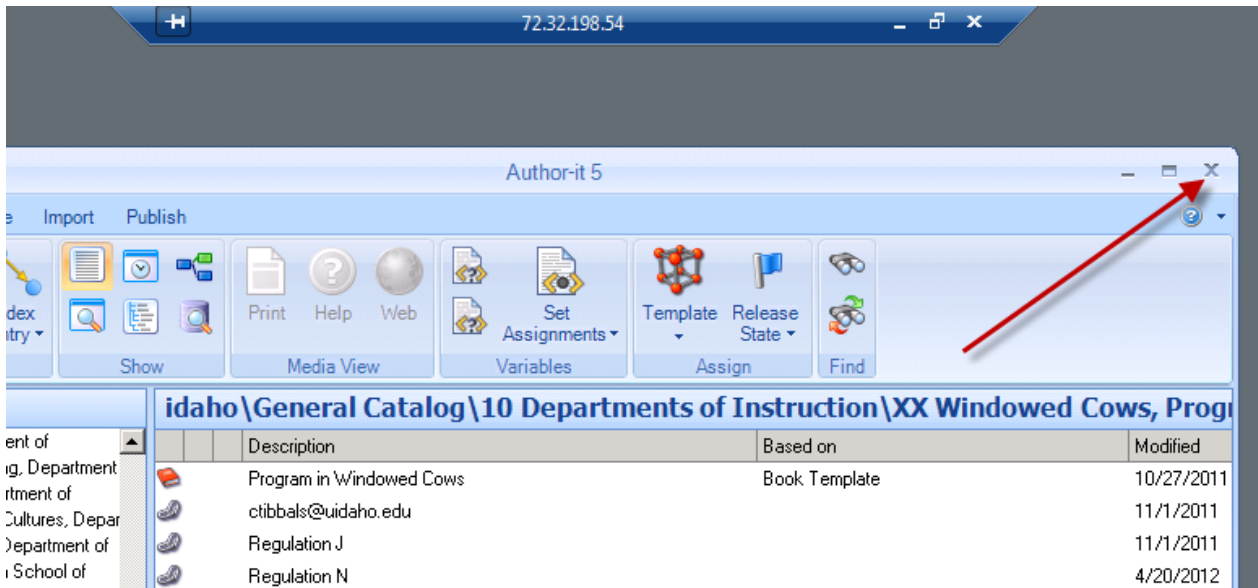
8. Remote Desktop for Macintosh Users

If you are using a Macintosh computer you may not have a remote desktop utility that can function with Windows. If that is the case you will need to locate one and download it to your machine before you can make edits in the SmartCatalog system. Here is a utility others have used with success: http://www.microsoft.com/mac/remote-desktop-client.