Learner Pathways Data Collection and Reporting (DCaR) - How-to Guide

How-to guide for using DCaR to upload data into ACAT's Learner Pathways Catalog

Version 2 (February 2017)

Alberta Government

Contents

Purpose

Post-secondary institution ACAT Contact Persons can use this **step-by-step guide for the Learner Pathways DCaR Modules** to upload **course**, **program** and **transfer agreement/decision** information into the Alberta Council on Admissions and Transfer (ACAT) Learner Pathways Catalog.

Background

Alberta's Learner Pathways System **(LPS)** is comprised of stakeholders, including post-secondary institution staff and students, and all of the identified technology systems and tools that are ACAT-related supports for learner pathways and mobility. LPS tools and supports include:

- Secure Identity & Access Management System (SIAMS) for secure user access
- Learner Pathways Data Collection and Reporting (DCaR) modules for mass uploading course, program, and transfer agreements/decisions data into the Catalog
- Learner Pathways Transfer Credit Evaluation System (TCES) for articulating agreements (once available)
- Learner Pathways Catalog (Catalog) for managing and storing data as a central repository, including a Settings (administration) tool for institutions and ACAT
- Transfer Alberta website, search tool, and mobile app for publicly sharing Catalog data and learner pathways information with students and other stakeholders.

The **Learner Pathways Data Collection and Reporting (DCaR)** application is a tool to transfer/upload information from post-secondary institutions' systems into the Learner Pathways Catalog (Catalog). In turn, the Catalog supplies data to the Transfer Alberta website, search tool, and mobile app, which help inform learners, educational staff, and post-secondary institutions regarding learner pathways and mobility, including transferability, within Alberta's Transfer and Pathways System.

> **Important:**
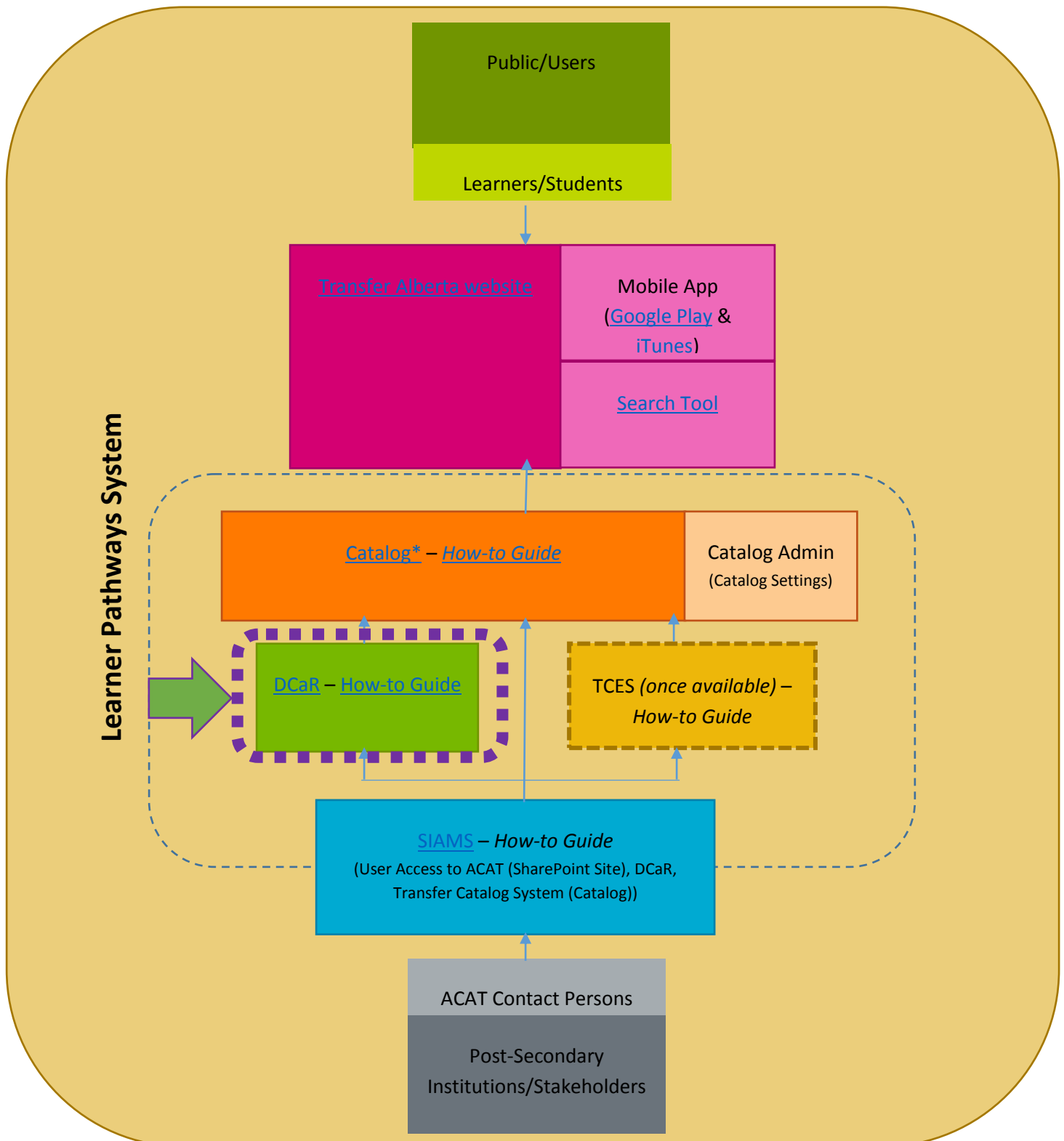> How-to video tutorials to support this guide are accessible on ACAT's
> **Transfer Alberta YouTube Channel** at
> https://www.youtube.com/channel/UCr8sUaJBrdt8C3_MZcmxFRw.
> ACAT will add new videos and updated versions of the current videos as needed.

Learner Pathways System (LPS):

Important: See how-to video—LPS Overview.

Learner Pathways System

- Public/Users
- Learners/Students
- Transfer Alberta website
- Mobile App (Google Play & iTunes)
- Search Tool
- Catalog* – How-to Guide
- Catalog Admin (Catalog Settings)
- DCaR – How-to Guide
- TCES (once available) – How-to Guide
- SIAMS – How-to Guide
  (User Access to ACAT (SharePoint Site), DCaR, Transfer Catalog System (Catalog))
- ACAT Contact Persons
- Post-Secondary Institutions/Stakeholders

Logging In

1. Launch your Internet browser (e.g., Internet Explorer, Google Chrome).

   NOTE: The Learner Pathways Catalog (Catalog) may function better in Google Chrome. You may wish to access DCaR using the same browser you intend to use for the Catalog.

   If you are using Internet Explorer, for the Catalog to display properly, you will need to go under Settings/Tools > Compatibility View Settings > and then un-check the box for "Display intranet sites in Compatibility view".
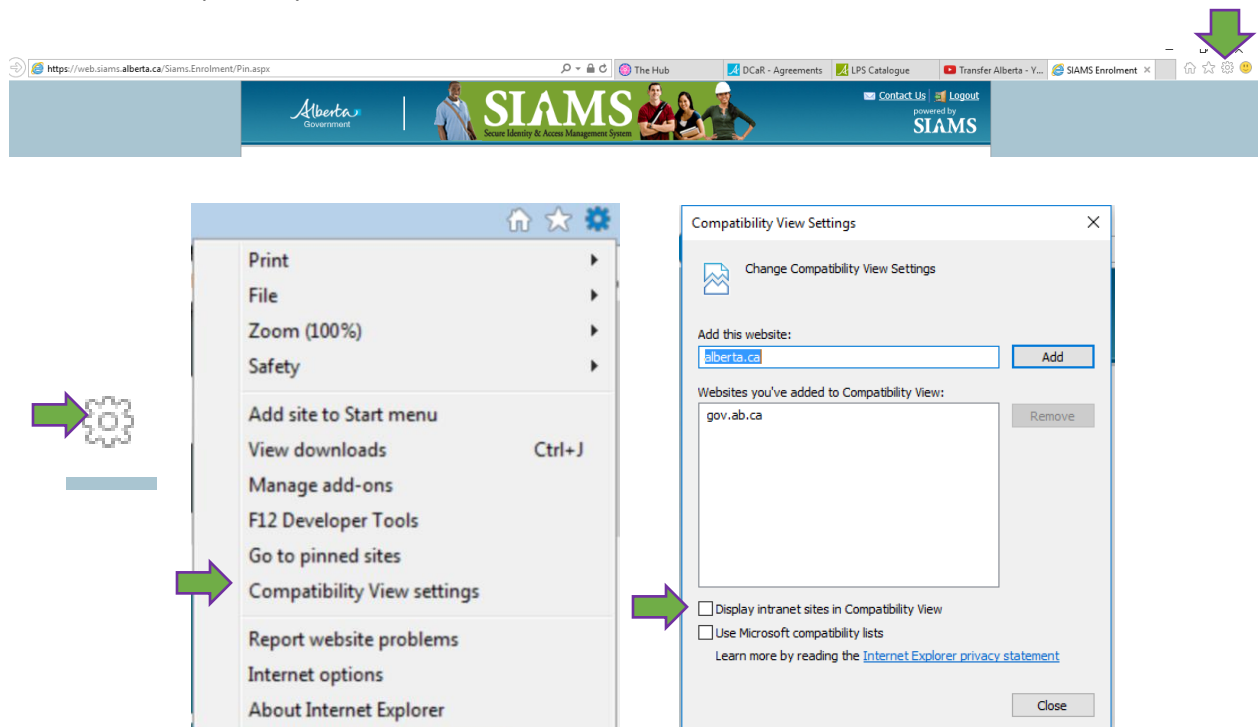
2. Copy and paste the following **Learner Pathways DCaR URL** into your browser's address bar:

   https://psdata.eae.alberta.ca/DCAR.Web.External/

   OR

   Paste the following SIAMS Application Dashboard URL into your browser's address bar and **select DCaR** from the Business Partner Applications drop down list and click on **Go**:
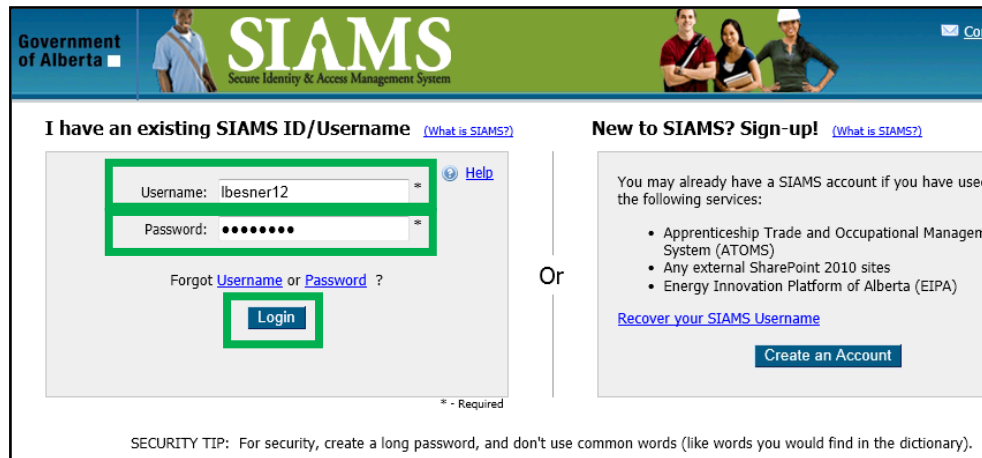
   https://adfs.siams.alberta.ca/adfs/ls/Dashboard.aspx?Signin

3.

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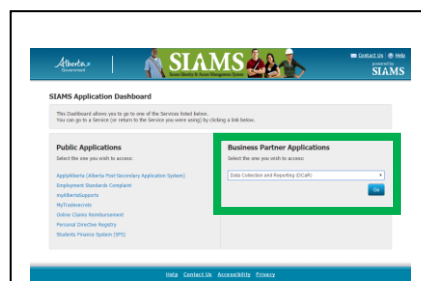
3. Enter your SIAMS **Username** and **Password** and click the **Login** button.

NOTE: If you do not have an existing account, you would have to create a SIAMS **Username** and **Password**. If you are an ACAT Contact Person at your institution, you would have received a Learner Pathways Catalog PIN letter and a DCaR PIN letter. **You will need to activate your PINs for both the Learner Pathways Catalog and DCaR before you can use these applications**.
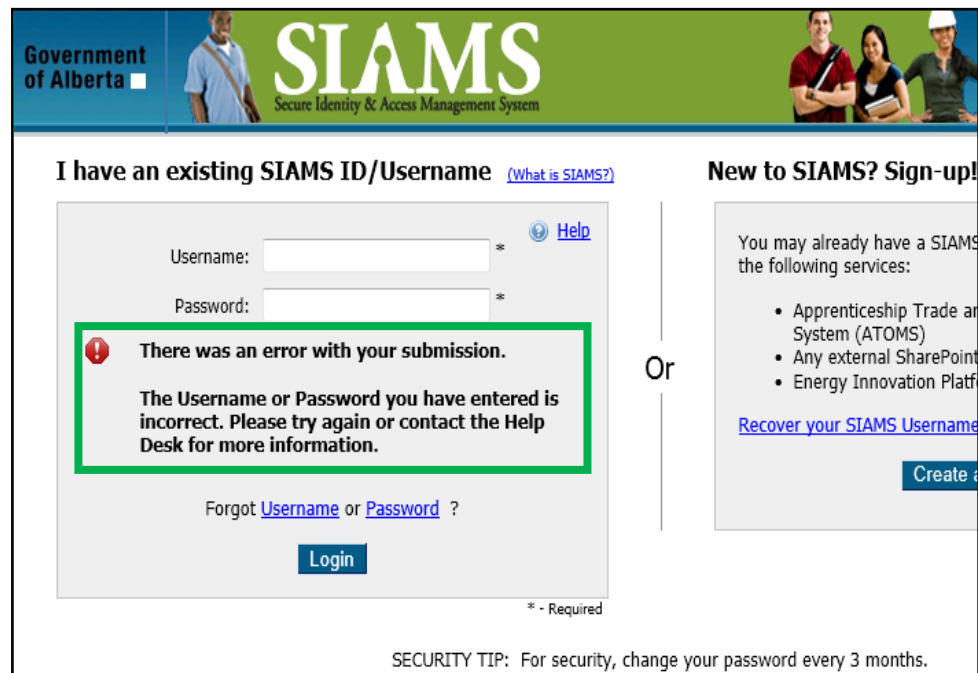

NOTE: If you enter the incorrect **Username** and **Password** combination, you will be presented with a message indicating to re-enter the correct information.

Once you have successfully logged in, the **Terms and Conditions** page is displayed.

4. Review the terms and conditions and check the "**I acknowledge**" statement checkbox and click on the **Accept** icon to continue.

Navigation

> **Important:** See how-to video—DCaR Modules . Overview of Login, Homepage, Publishing.

1. Once you have agreed to the terms and conditions, the main DCaR page is displayed. This includes the **Home**, **Agreements**, **Courses** and **Programs** tabs, and the **Sign Off** link. You may also have other system's tabs available to you if you have been granted access to other GoA systems that also use DCaR.
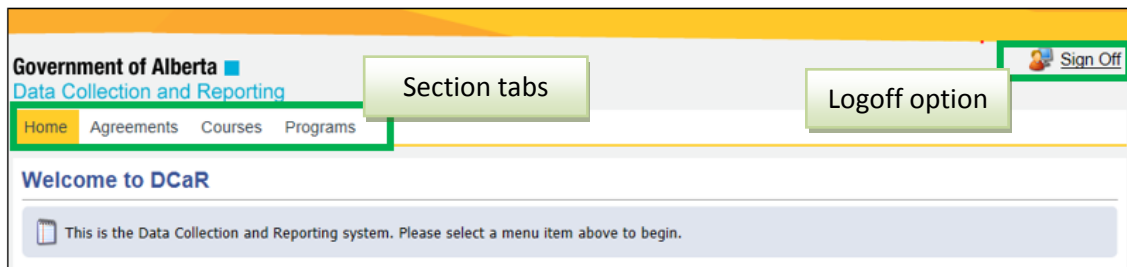
Data Submission Process – Mass Upload

> **Important:** See how-to video—DCaR Modules . Overview of All 3 Steps for Mass Uploading CSV File.

The steps for entering your institution's data into the catalog are:

1. **Create** a CSV upload file for courses, programs, or transfer agreements/decisions and **import** the file (**Import Data**).
2. **Validate** the course entries (**Validate Data**) and **make corrections as needed to address errors** in your records identified in the validation report (**View Validation Errors**).
3. **Publish** your institution's information to the Catalog (**Publish Data**).

> **Important:**
> The **course** data submission process/steps will be outlined in this guide. The data submission process is the **same for courses, programs and agreements**, so you can follow these steps for all three. Each do have different data requirements, however (see CSV File Formats for Courses, Programs, and Agreements). Blank CSV templates are also available for your use when you are creating an upload file; these templates already include the needed data requirements headings.

NOTE: When uploading your CSV files, please ensure that you upload data into the **Courses** and **Programs** tabs first, then the **Agreements** tab. This is because agreements/decisions rely on the courses and programs data to create the needed relationship in the system.

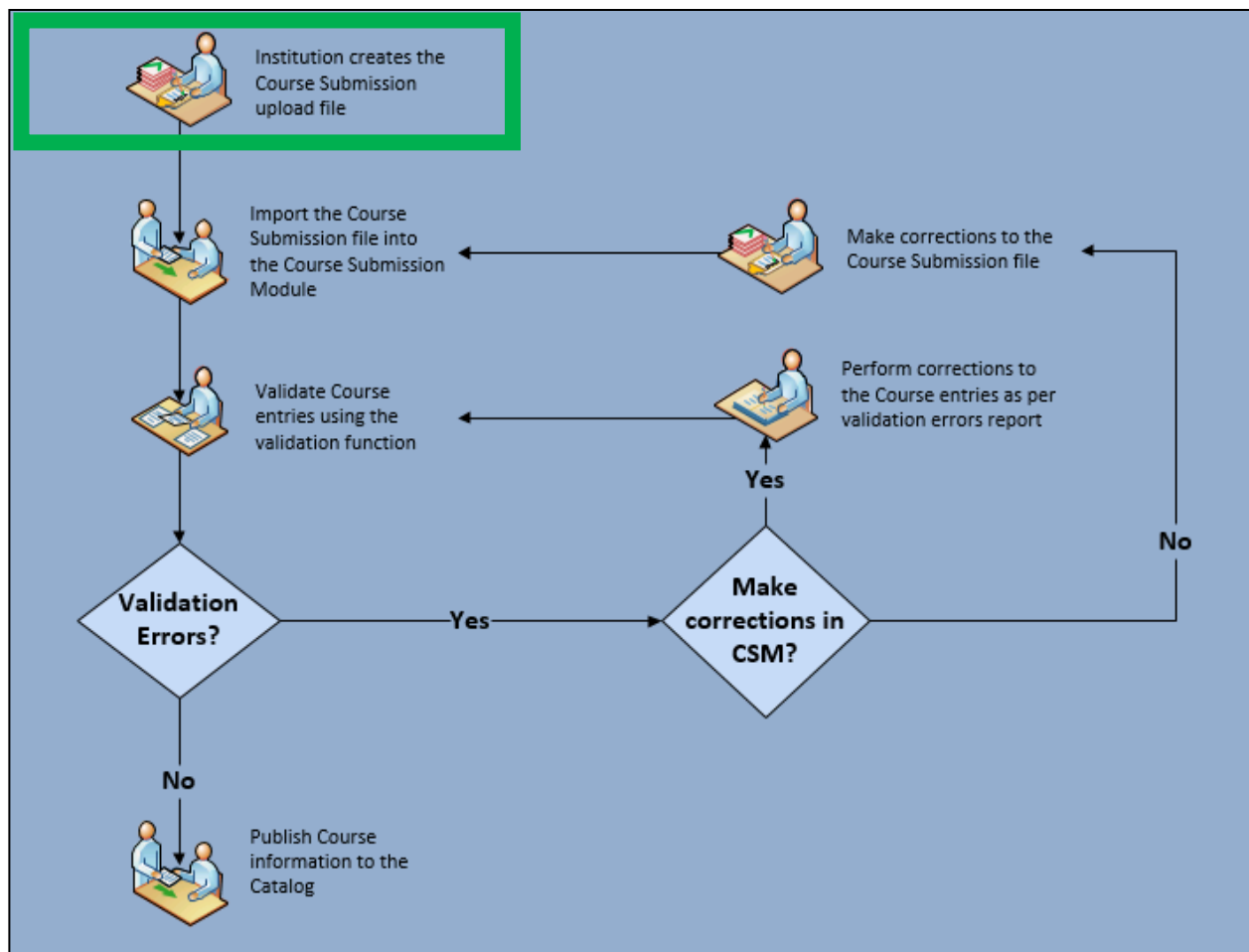## Step 1 - Creating and Importing the Course Submission Upload File

DCaR is a tool that enables you to mass upload your institution's courses, programs, and transfer agreements/decisions data to the Learner Pathways Catalog.

Following the course submission upload process as an example, the first step is for your institution to **create the course submission upload file and import this file into DCaR**. See ACAT's website for a Course CSV template, CSV File Format containing required data standards, and LPS Data Dictionary.

> **Important:** See how-to videos:
> - DCaR Modules . Step 1 of 3 Creating and Importing a CSV File .
> - DCaR Modules.CSV File Formats and Common Editing Errors .

NOTE: For post-secondary institutions that do not have their own technical systems for courses, programs, or agreements, please see the interim solution.

CSV File Format Requirements

Each of your institution's upload files must be in **CSV** format. A CSV file looks like a spreadsheet when it's opened in Microsoft Excel, but it has the ".**csv**" file extension.

Here is a sample upload file, as viewed in Microsoft Excel.

Institutions that have their own technical systems (e.g., PeopleSoft, Banner) can ask their IT staff to generate these files, **pulling data directly from their institution's system into the CSV file**.

NOTE: You do not need to track what data already exists in DCaR or what data you will submit in the future. DCaR will use key fields in each record (e.g., institution course ID, course code, course title, course number) to check newly submitted data against existing data. Depending on what is appropriate, DCaR in conjunction with the Catalog will update existing data, add new data, or leave data unchanged. You will not have to worry about creating duplicates. It is recommended to have your institution's system be the source of truth and for you to upload this data into DCaR for publishing in the Catalog.

For data requirements, again, please refer to the Word documents titled "CSV File Format", which detail the CSV file requirements for the **Courses**, **Programs** and **Agreements** tabs in DCaR. You can also locate this information in the CSV File Format Terms section of this document.

> **Important:** See how-to videos:
> - DCaR Modules.CSV File Formats and Common Editing Errors.
> - DCaR Modules . Editing CSV Files for Required Date Format.

Importing your Institution's Course Data

Once you have created your CSV file, the information from the file must be imported into DCaR. Continuing to follow this guide's example using course data, the next step is to import the file into the **Course Submission Module**.

> **Important:**
> When uploading your CSV files, please ensure that you upload data into the **Courses** and **Programs** tabs first, then the **Agreements** tab. This is because agreements/decisions rely on the courses and programs data to create the needed relationship in the system. The steps for each upload of data in DCaR are the same for courses, programs, and agreements/decisions.
>
> See how-to videos:
> - DCaR Modules . Step 1 of 3 Creating and Importing a CSV File .
> - DCaR Modules.CSV File Formats and Common Editing Errors
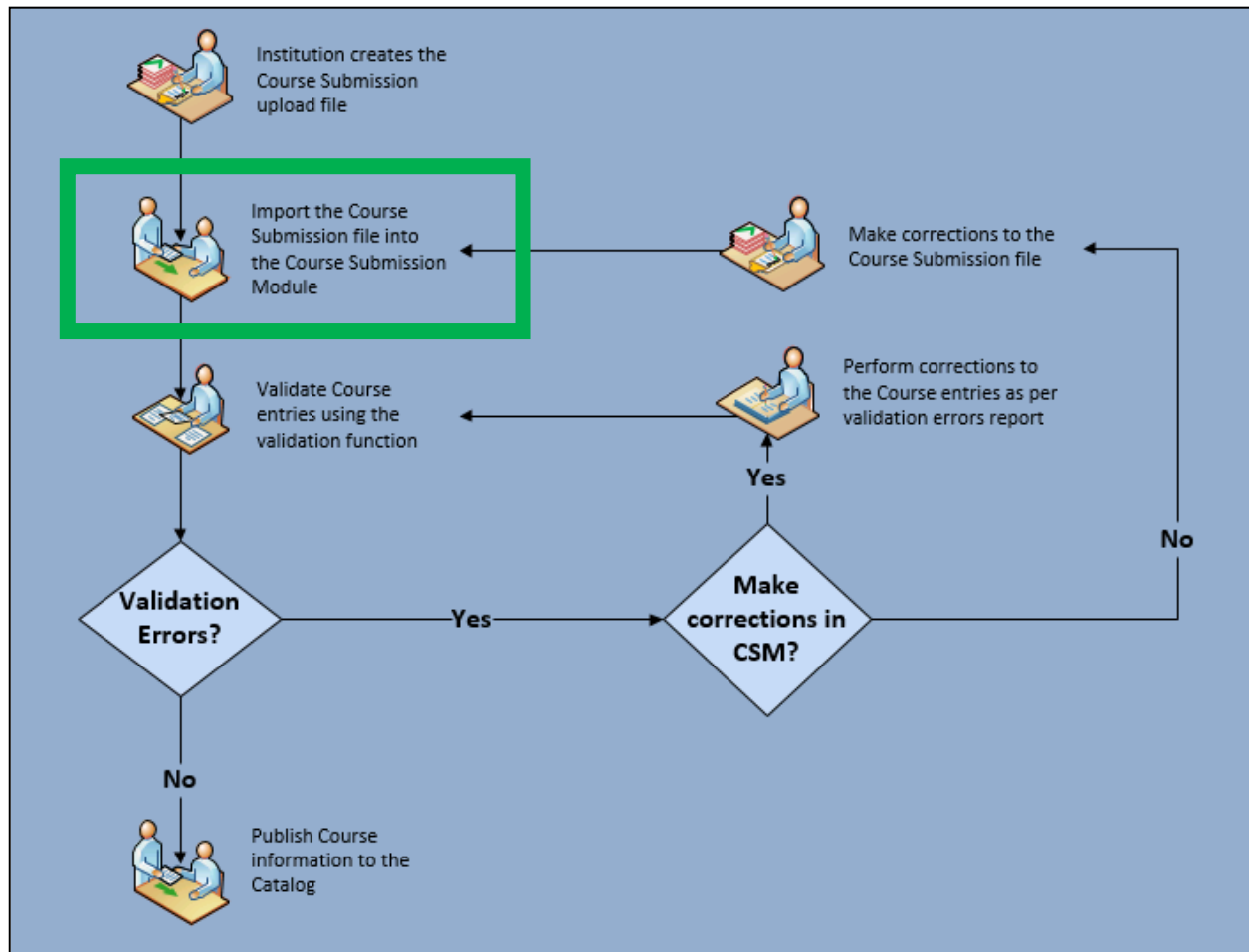
1. From the home screen, click on the **Courses** tab.

2. On the Courses page, click on **Submissions**.
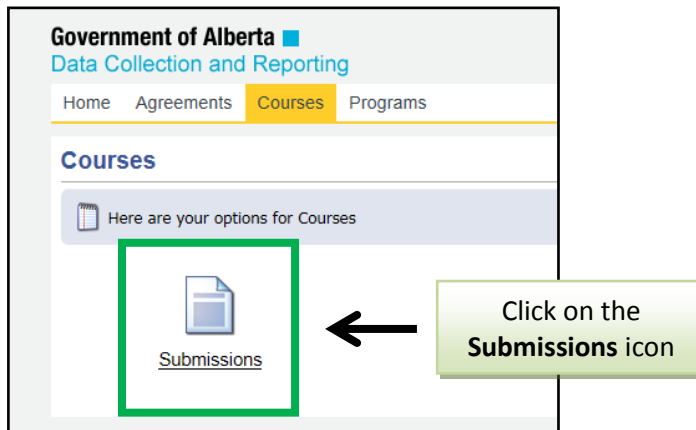
3. Once the screen reloads, click **Import Data**.
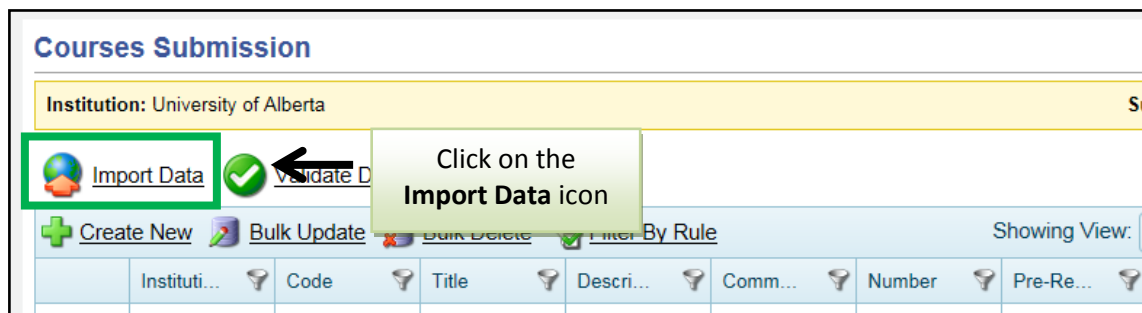
4. The **Import Courses Data** window is displayed. If you are importing data from a CSV, make sure **Import New Data** is selected. Click **Select a file to upload.**

NOTE: For instructions on importing data from the Catalog, see Import from Transfer Catalog in this guide.

5. Select the file you wish to submit.

    NOTE**:** The file being submitted must be in the **CSV** file format (see CSV File Format Requirements).

Select the file to be submitted
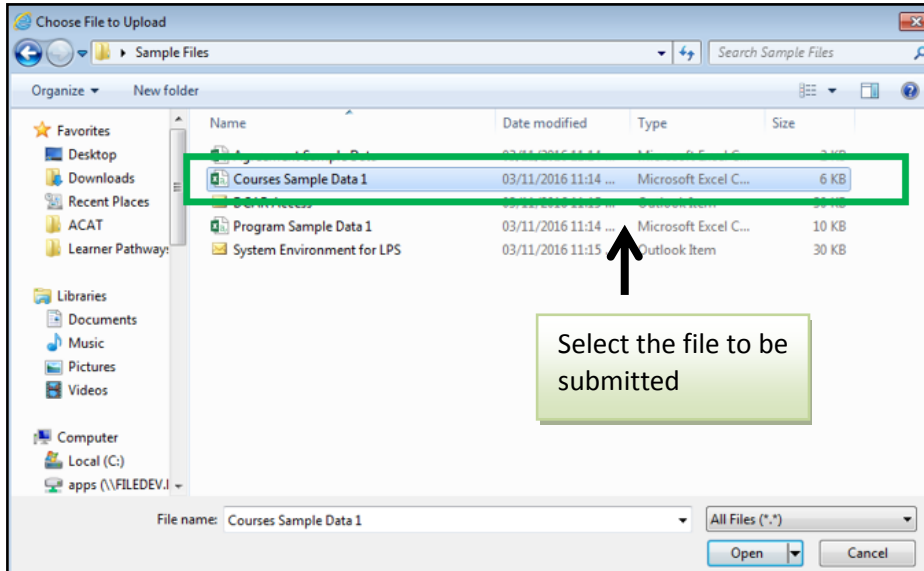
The **Import Courses Data** window will refresh with the title of the file you selected.

6. Click **Import File**.

File to be uploaded

Click on the **Import File** link to continue
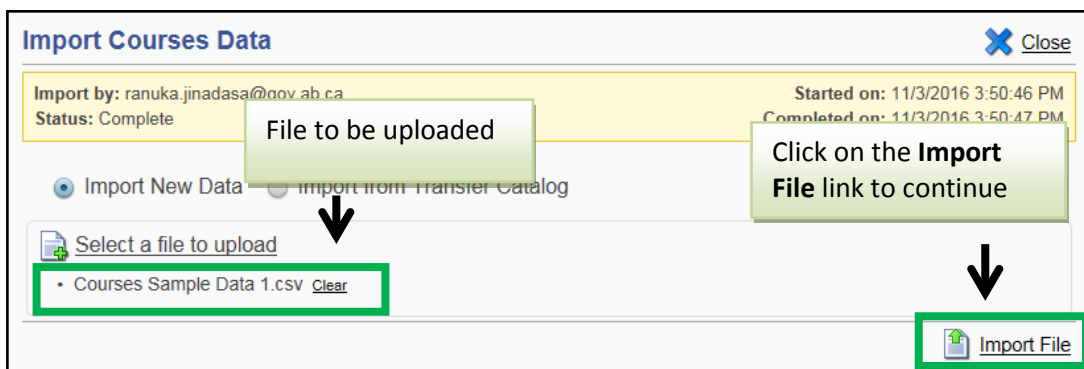
7. Click **Confirm** to continue with the import.

    If the import is successful, the **Import Courses Data** window will close, and the **Courses Submission** page will reload with the data from the CSV file.

If the import fails, a red message is displayed in the **Import Courses Data** window highlighting the error(s) in the file. A sample message is provided here.

8. Click **Close** and go back to your CSV file to correct the errors and begin the Import Data process in DCaR, again, for your corrected file **OR** click on **New Import** to upload a different CSV file if you accidentally imported the wrong file.
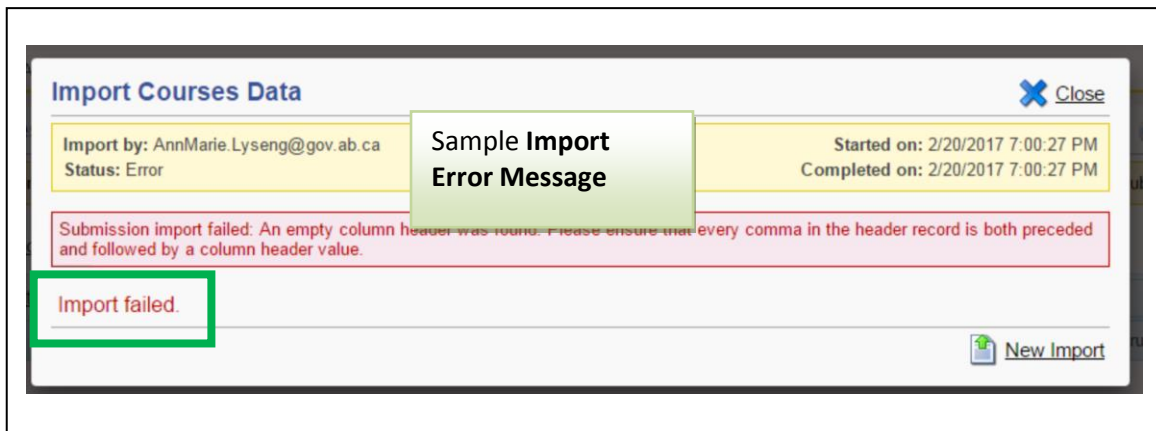
Step 2 - Validating and Correcting Errors in your Institution's Course Data

Once you have imported your data, you must validate your data and correct any errors encountered in the validation process. Records containing errors cannot be published to the Catalog.

> **Important:** See how-to videos:
> - DCaR Modules.Validating a CSV File Mass Upload (Step 2 of 3).
> - DCaR Modules.CSV File Formats and Common Editing Errors.

Validating your Institution's Course data is the next step.
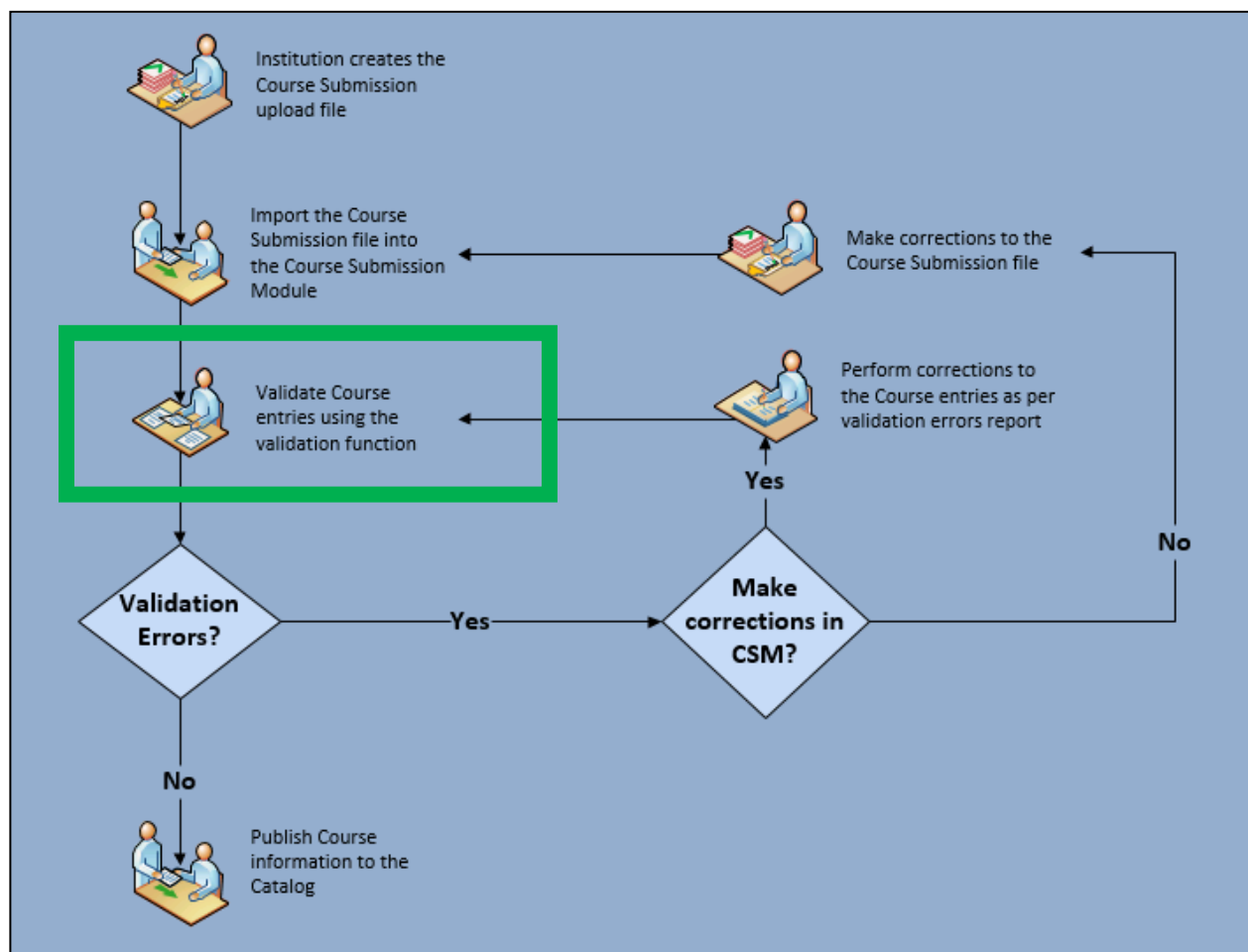
1. On the **Courses Submission** page, click **Validate Data**.

Courses Submission

Institution: University of Alberta

Import Data   ✓ Validate Data   🌐 Publish

> Click on the **Validate Data** link

➕ Create New   🖉 Bulk Update   🗑 Bulk Delete   ✓ Filter By Rule

Instituti... ▽	Code ▽	Title ▽	Descri... ▽	Con
🖉 ✖ 12345	370485725	amet tincid...	nibh ipsum...	lore
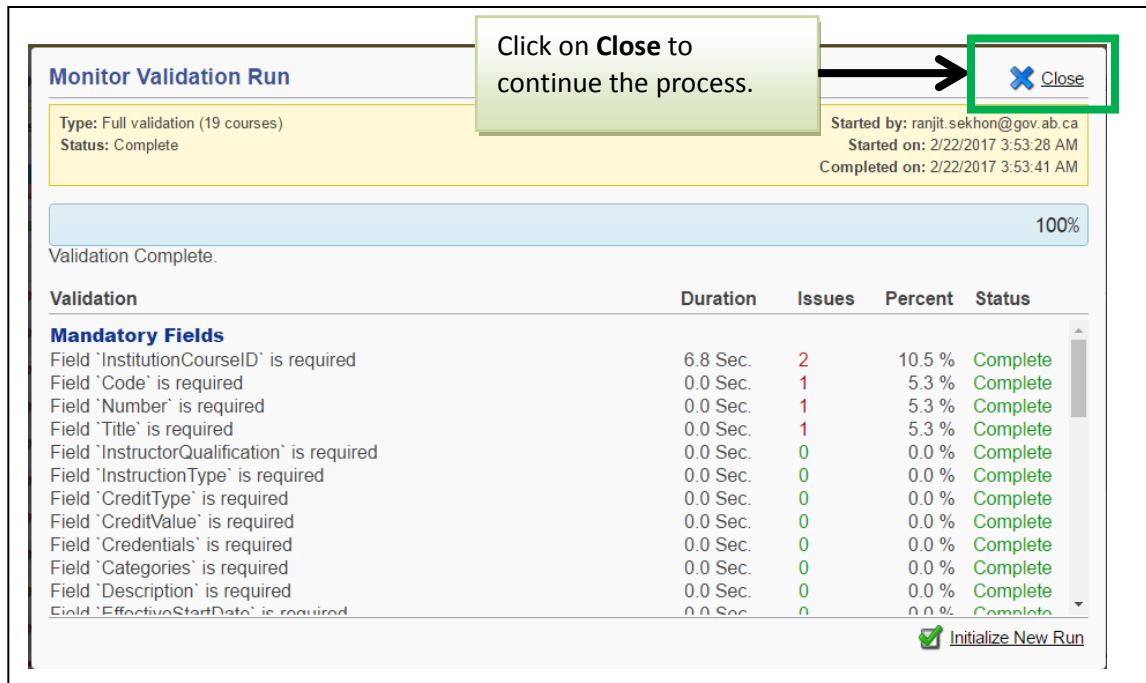
2. The **Initialize Validation Run** window is displayed. Click **Run Validations** to execute the validation routine.

Initialize Validation Run   ✖ Close

Institution: Northern Alberta Institute of Technology   **Submission:** 2016 Submission
Status: Draft

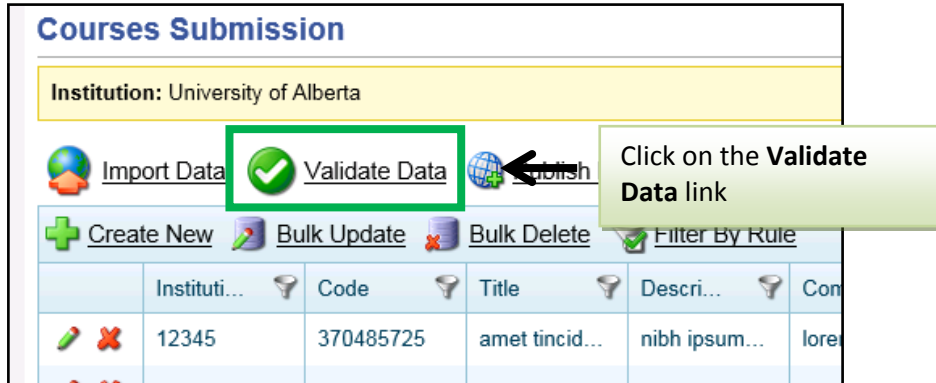| **Validation**	**Type**	**Record**
✓ Select All ☐ Clear All		
✓ **Mandatory Fields**		
✓ Select All ☐ Clear All		
☑ Field `InstitutionCourseID` is required	Enterprise	Course
☑ Field `Code` is required	Enterprise	Course
☑ Field `Number` is required	Enterprise	Course
☑ Field `Title` is required	Enterprise	Course
☑ Field `InstructorQualification` is required	Enterprise	Course
☑ Field `InstructionType` is required	Enterprise	Course
☑ Field `CreditType` is required	Enterprise	Course
☑ Field `CreditValue` is required	Enterprise	Course
☑ Field `Credentials` is required	Enterprise	Course
☑ Field `Categories` is required	Enterprise	Course
☑ Field `Description` is required	Enterprise	Course
☑ Field `EffectiveStartDate` is required	Enterprise	Course
☑ Field `DeleteRecord` is required	Enterprise	Course
✓ **Reference Data**		

> Click on the **Run Validations** option to execute the validation routine.

📄 View Last Run   ✓ Run Validations   ↺ Reset

3. The **Validate Submission** report is displayed. Review the report and then click **Close** to continue with the validation process.

Reviewing Validation Results and Correcting Errors

Once you have executed the validation routine for your institution's submission, you can view the Validation Errors report to review any errors that may be present in the records in your file.
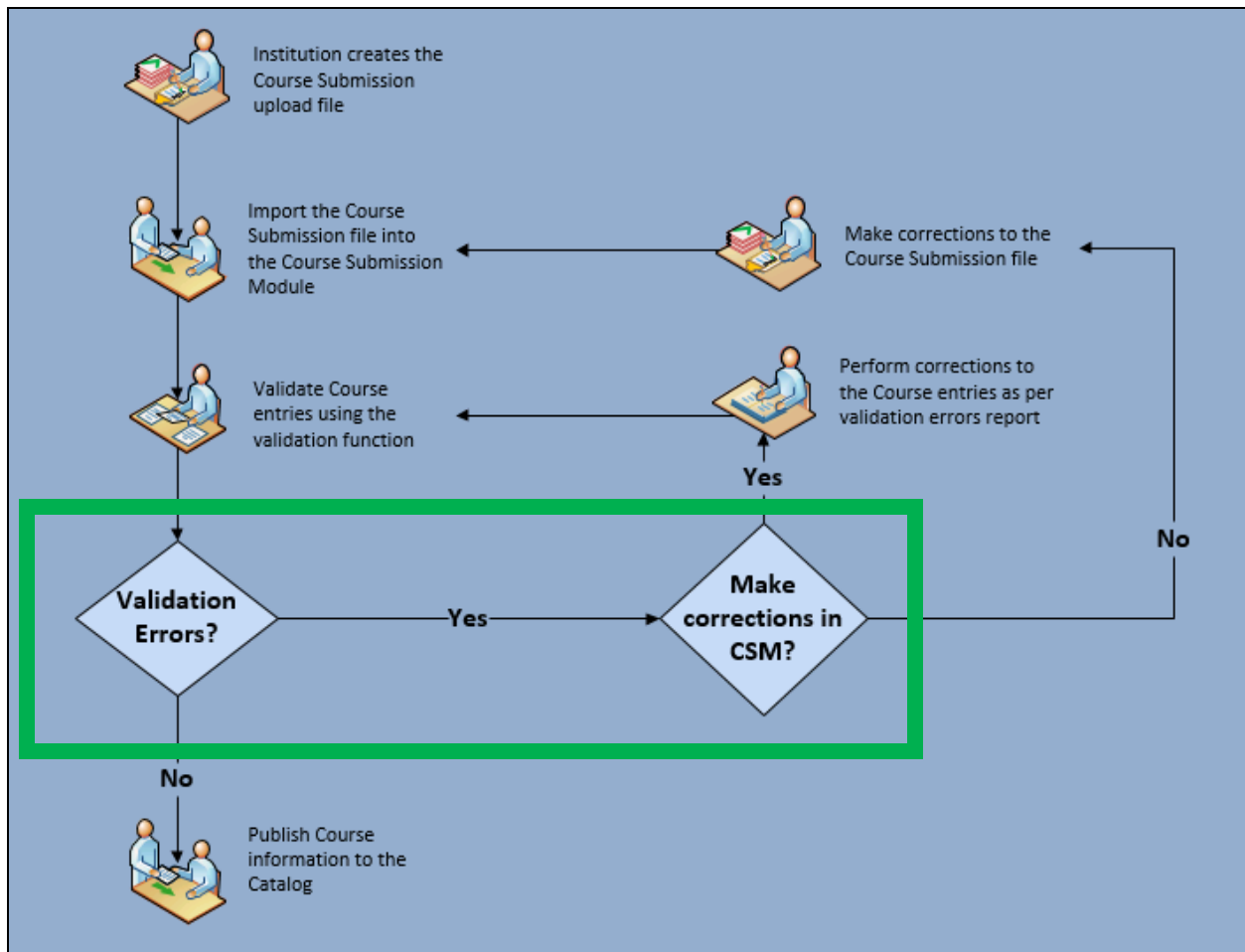
Reviewing Validation Results is the next step in the **Courses Submission Process**.

NOTE: If errors are identified during validation of your submission, it is recommended that you **make the required changes to the data in your institution's system to maintain it as the source of truth**. After correcting the errors, you will need to **re-create the CSV upload file and follow the earlier steps** for importing and validating the data, again. If the errors are caused by a **DCaR formatting requirement(s)** only (and not errors in your institution's CSV file data), then you **may wish to correct the errors by editing the data directly in DCaR** (e.g., bulk update for date format) (see Editing Data in DCaR).

You may also decide to publish those records in your submission that contain no errors, and correct the records with errors separately in your system, re-uploading just the corrected records at a later date.

1. On the **Courses Submission** page, select **Validation Errors** from the **Showing View** drop-down list.

The screen will reload with a grid that lists:

a. **Records** –The number of errors encountered for each validation rule.
b. **Percentage** – Indicates the percentage of all records with exceptions to the listed validation rule.
c. **Validation** – The validation rules executed during the validation process.

2. Click on the arrowhead icon in the far left column to view the records included in the **Record Count** for the **Validation Rule** indicated in the selected row.

A sub-grid listing submissions included in the **Error Count** is displayed, just below the listed rule.

2. Click on the arrow head again to hide the listing.

3. Click on the filter icon to view the records included in the **Error Count**.

4. The screen will reload to show the submission records included in the **Error Count**.

NOTE: As referenced, if errors are identified during validation of your submission, it is recommended that you **make the required changes to the data in your institution's system to maintain it as the source of truth**. After correcting the errors, you will need to **re-create the CSV upload file and follow the earlier steps** for importing and validating the data, again. If the errors are caused by a **DCaR formatting requirement(s)** only (and not errors in your institution's CSV file data), then you **may wish to correct the errors by editing the data directly in DCaR** (e.g., bulk update for date format) (see Editing Data in DCaR).

You may also decide to publish those records in your submission that contain no errors, and correct the records with errors separately in your system, re-uploading just the corrected records at a later date.

Step 3 - Publishing your Institution's Course Data to the Catalog

Once you have validated your data, you must publish it in order to complete the submission to the Learner Pathways Catalog.

> **Important:** See how-to video—DCaR Modules.Publishing Data to the Catalog Mass Upload (Step 3 of 3).
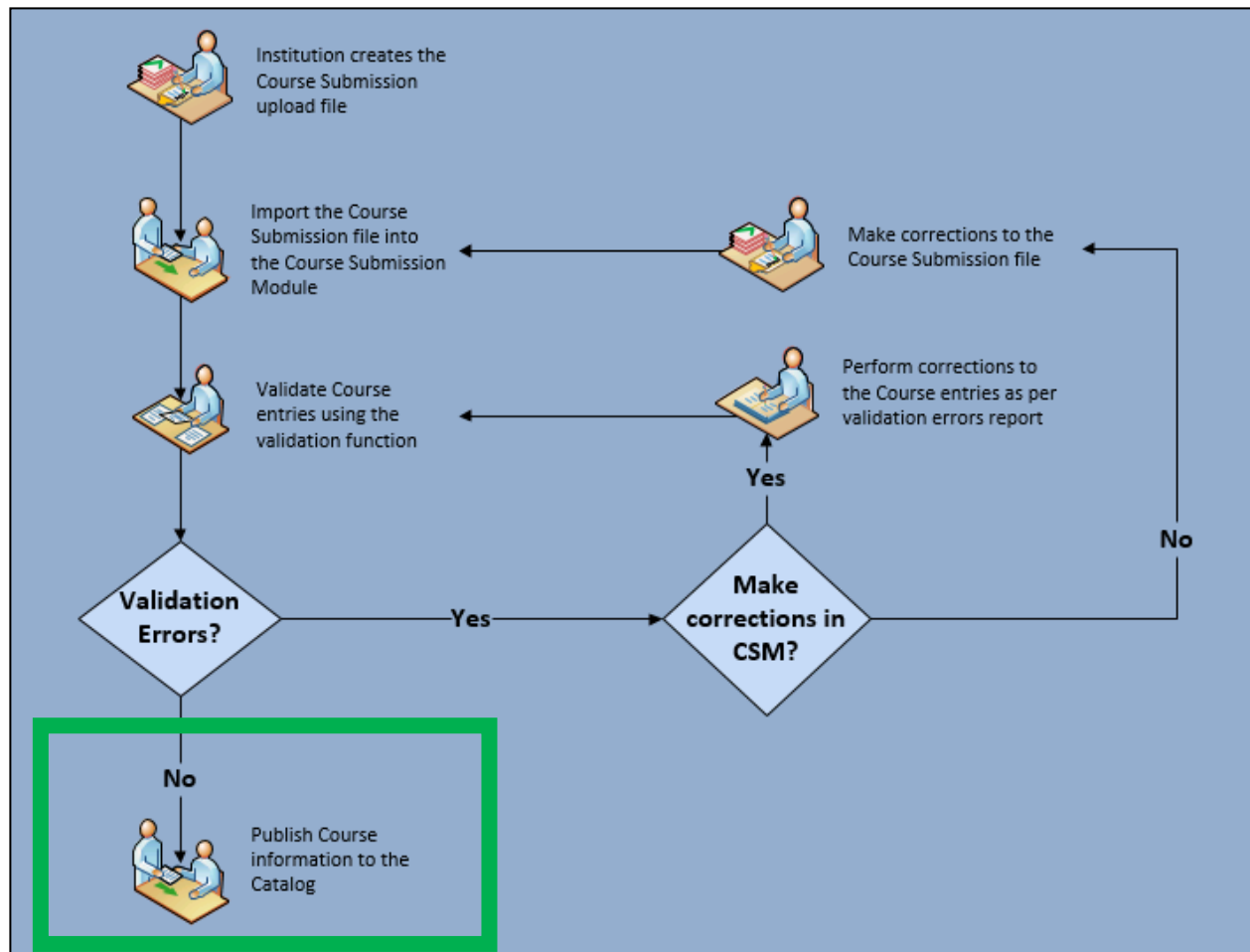
Publishing your Institution's Course Data is your final step in the **Course Submission Process**.

1. Starting from the **Courses Submission** page, click **Publish Data**.

2. The **Publish Data** window is displayed, indicating the number of records that are available to publish. Click **Publish Records** to continue.

   NOTE: The **Publish Data** window will refresh to indicate the progress of the publishing to the Catalog. This may take a few moments, so please be patient.

   NOTE: Submission data must be validated every time there is a new upload of data or changes made to any of the records in your submission. If you attempt to publish your data prior to validating it, you will see the following error message.

3. Once the publishing process has completed, click **Close** to return to the **Courses Submission** page.
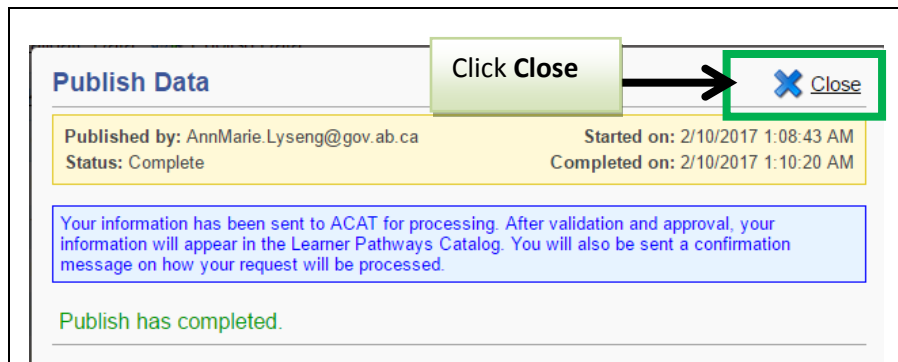
4. The **Courses Submission** page will reload with the **Published Results** view displayed. This confirms the published records. Click on the far left arrowhead to expand and view the records that were published.

Click on the arrow head icon to view the details of the records that were published.
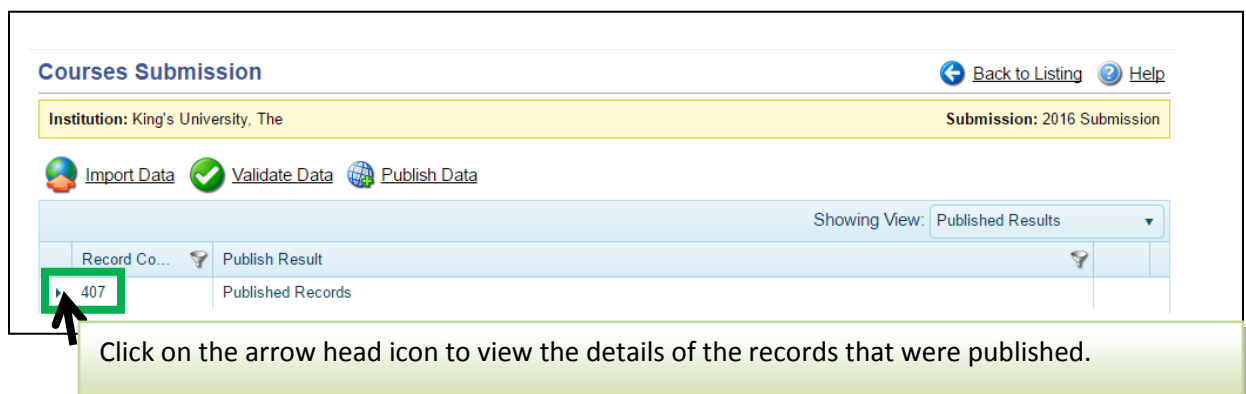
5. You can select the **Course Records** view to see the listing of records that were not published to the Catalog. Any records that contained errors are displayed in this view, as DCaR will not publish records with validation errors.
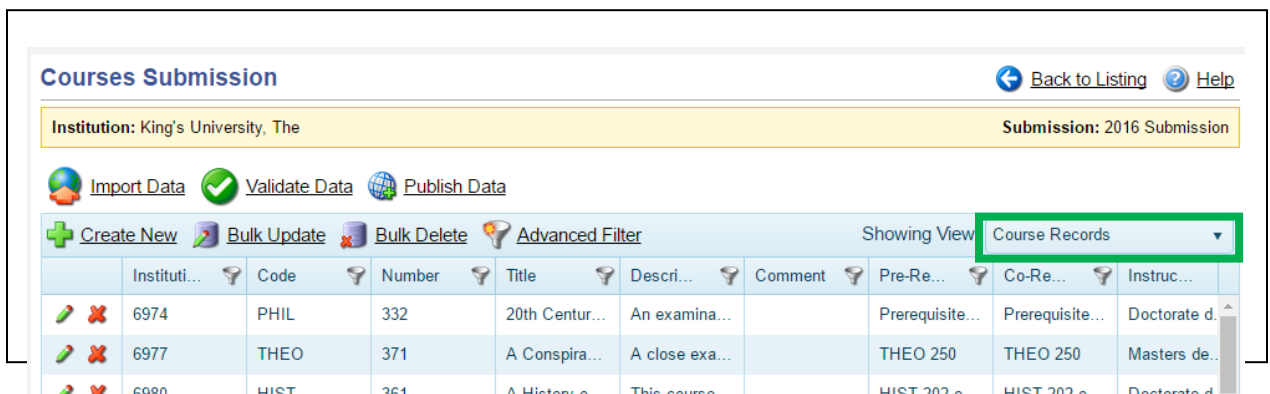
Editing Data in DCaR

Once you have imported your data, you can do manual updates in DCaR where/as appropriate. DCaR supplies this data to the Catalog, which in turn supplies data to the Transfer Alberta website, search tool, and mobile app.

NOTE: Recommended best practice is for an institution to **correct submission errors in your institution's system to maintain it as the source of truth**. After correcting the errors, you will then, again, need to **re-create the CSV upload file and follow the same earlier steps** for importing and validating data, as well as meet the CSV File Format data requirements that have been outlined in this document.

If the errors are caused by a **DCaR formatting requirement(s)** only (and not errors in your institution's CSV file data), then you **may wish to correct the errors by editing the data directly in DCaR** (e.g., bulk update for date format).

1. Using the **Courses Submission** page as an example, click on the **Edit** icon (a green pencil at the far left of each row).
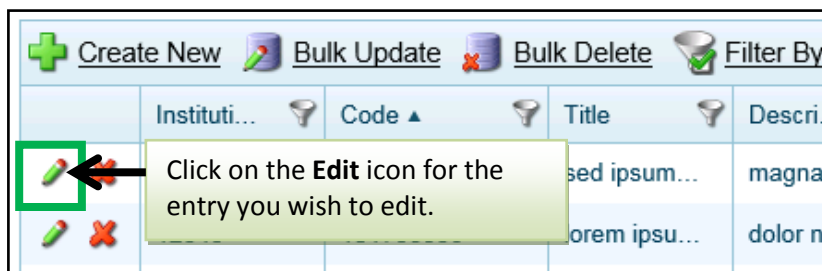
2. After clicking the edit icon, the **Course Record Management** window is displayed. Update the information as appropriate and then click **Save** to submit your changes.

   NOTE: A **Bulk Update** option can also be used when you are viewing your Validation Errors and need to make the same type of correction in multiple records, such as date format.

Interim Solution for Institutions without Technical Systems

There are different approaches that can be used by institutions without technical systems for courses, programs, and/or agreements, so that you can use DCaR to upload your institution's data into the Learner Pathways Catalog. For assistance using the Learner Pathways DCaR Modules or any of the information in this how-to guide, please contact the ACAT Secretariat.

For data requirements, please refer to the Word documents detailing the CSV File Format requirements for the Courses, Programs, and Agreements tabs in DCaR, as well as the CSV File Format Terms section of this document.

> **Important:**
> When uploading your CSV files, please ensure that you upload data into the **Courses** and **Programs** tabs first, then the **Agreements** tab. This is because the agreements/decisions data rely on the courses and programs data to create the needed relationship in the system.
>
> See how-to videos:
> - DCaR Modules . Overview of Login, Homepage, Publishing.
> - DCaR Modules . Overview of All 3 Steps for Mass Uploading CSV Files.

1. Once you have logged into **DCaR**, you will see the **Home** tab. You will see the **Agreements**, **Courses** and **Programs** tabs, as well as the **Sign Off** link.
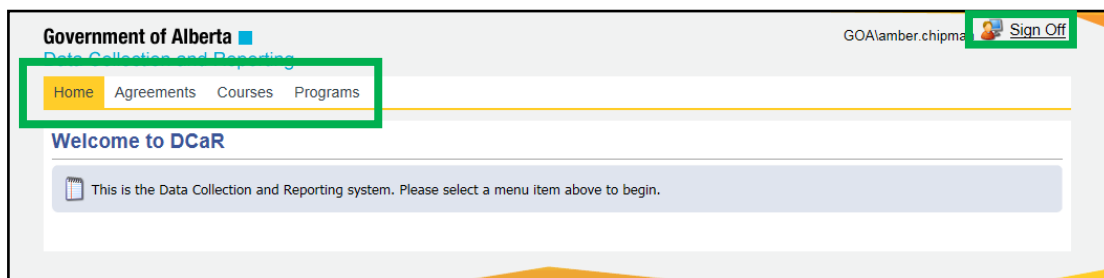
NOTE: While this example shows how to add a course under the **Courses** tab, the process for adding data to the **Programs** and **Agreements** tabs is the same.

2. Click the **Courses** tab and then click **Submissions**.

At this point, as an institution without a technical system for your data, you have **three main options** you can choose from to upload your institution's course, program, or agreement data into DCaR (again using Course submissions as an example):
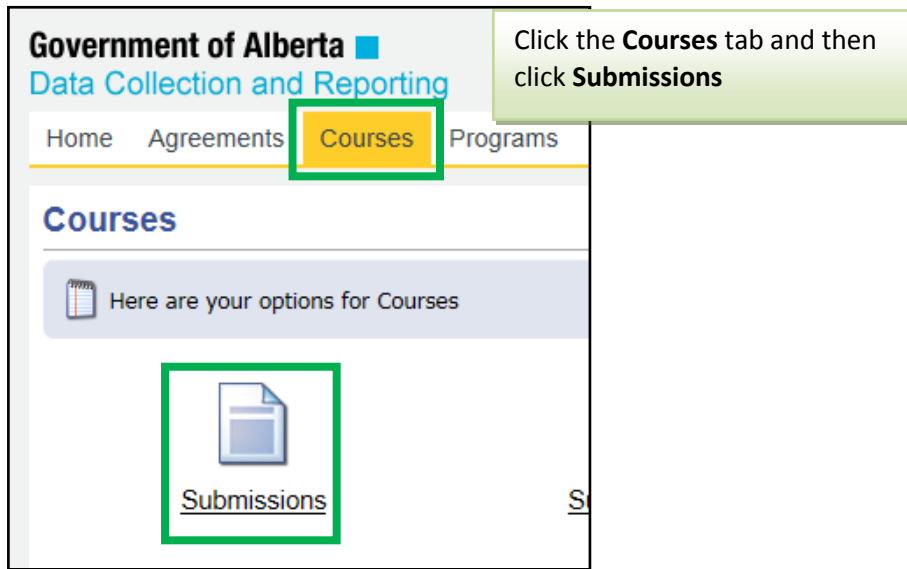
i.   **Create New**: Create a new course record directly in DCaR.

ii. **Import New Data**: Manually fill in a blank CSV course file template that you will use to upload a new course(s) into DCaR.

iii. **Import from Transfer Catalog**: Use the Import from Transfer Catalog feature to **view and edit** a **copy** of all of your already published courses from the Catalog directly in DCaR. Once the data is imported into DCaR, you can also choose to **export** from DCaR a CSV file of these courses for editing and then re-uploading to DCaR.

i.   Create New

You can use this feature to **create a new course record directly in DCaR**.

1. Once the screen reloads, click **Create New**. This feature allows you to create a new course record directly in DCaR.

2. Complete all the data fields in the **Create New Course Record** window and click **Save**.

The screen will refresh with the course now on the screen.

Once you have added all of your **new data records** to the **Courses**, **Programs** and **Agreements** tabs as needed, proceed with following **Steps 2-3** of this guide, starting with Step 2 - Validating and Correcting Errors in your Institution's Course Data, followed by Step 3 – Publishing Your Institution's Course Data to the Catalog.

NOTE: Submission data must be validated every time there is a new upload of data or changes made to any of the records; otherwise, you will not be able to publish the data to the Catalog.

ii. Import New Data

You can use this approach to **manually fill in a blank CSV course file template** that you will use to **upload a new course(s) into DCaR**.

1. Manually fill in a <u>blank CSV course file template</u> with the appropriate data from your institution for each of the data fields for a course record.

    <u>NOTE</u>: This process is the same for courses, programs, and agreements, with <u>each having its own CSV template with unique CSV File Format data requirements</u>.
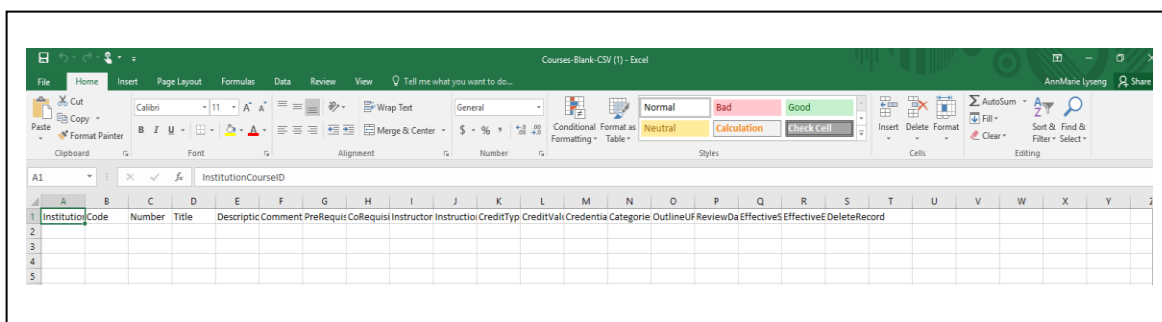
2. Use the manually completed file to upload a new course(s) into DCaR by completing **Steps 1 – 3 in this guide**, starting with <u>Step 1 – Creating and Importing the Course Submission File</u>, <u>Step 2 - Validating and Correcting Errors in your Institution's Course Data</u>, and <u>Step 3 – Publishing Your Institution's Course Data to the Catalog</u>.

iii. Import from Transfer Catalog

You can use this feature to import a **copy of your published courses, programs, or agreements data from the Catalog into DCaR**.   Once the data is imported into DCaR, you can also **export** from DCaR a CSV file of these courses for editing and then re-uploading to DCaR.

> **Important:**
> - When **importing a <u>copy</u> of your published Catalog data back into DCaR**, it is important that you are aware that it will **overwrite any unpublished DCaR data you already have in DCaR**.
>
> - As this Catalog data is a **<u>copy</u> of what has already been published**, use of **this import feature would be to obtain a copy of all of your courses, programs, or agreements data from the Catalog and to make edits as needed**. There would be no need to re-publish this already published data to the Catalog unless you are making updates/edits to the data.
>
> - If you **export** the copy of your data from DCaR into a CSV file for editing, it is also important to be aware that once you upload an updated copy of the CSV file to DCaR, the previous copy of the imported Catalog records will no longer be visible in DCaR (but will still be safely published in the Catalog).

1. Select **Import Data**.

2. Select **Import from Transfer Catalog** and **Confirm**.

3. You can now **View and Edit a copy of your Catalog data** as needed in DCaR. You can also choose to **Export a copy of all of your published Catalog records from DCaR into a CSV file** by selecting **Export** and following the same **Export** steps outlined for Exporting a CSV File from DCaR for All Unpublished Records.

4. If you have **viewing and editing your data directly in DCaR**, you can use the Editing Data in DCaR instructions in this guide to help you do so. Following completion of editing your records in DCaR, you can then follow **Steps 2 – 3 in this guide**, starting with Step 2 - Validating and Correcting Errors in your Institution's Course Data, and then Step 3 – Publishing Your Institution's Course Data to the Catalog.

5. If you are **exporting a copy of all of your published Catalog records from DCaR into a CSV file and editing these records directly in that CSV file,** you can then **re-upload the revised CSV file** and follow **Steps 1 – 3 in this guide**. Please start with Step 1 – Creating and Importing the Course Submission File, Step 2 - Validating and Correcting Errors in your Institution's Course Data, and then Step 3 – Publishing Your Institution's Course Data to the Catalog.

Modifying the Display of Submitted Course Data

This section will explain how to modify the display of your institution's data, using the Courses Submission page as an example.

The following are the topics covered in this section.

    i.   Sorting entries
   ii.   Filtering entries
  iii.   Filtering by validation rule

i. Sorting Entries

Once you have successfully imported your data, you can sort the entries based on columns.

1. On the **Courses Submission** page, the submitted records can be sorted by clicking the header of the desired column. For example, to sort by course code, click on the **Code** column header.

2. The records are now sort by **Code** in ascending order. Click on the column heading a second time to sort the records in a descending order.

ii. Filtering Entries

You can also filter the data based on the columns.

1. On the **Courses Submission** page, click the filter icon of the desired column. For example, to filter by course code, click the filter icon in the **Code** column header.

2. A criteria box is displayed, just below the column heading. Click on the first drop-down list and select the desired condition. For example: "Is equal to."

		Instituti...	Code ▲	Title	Descri...	Comment
✏	✖	12345	101240113	Show items with value that:	e..	diam tincid
✏	✖	12345	101758336	Is equal to ▼	l...	nibh tincidu
✏	✖	12345	103680921	105406252 ✖	t...	magna dol
✏	✖	12345	105406252	And ▼	a...	ipsum mag
✏	✖	12345	106801014	Is equal to ▼	l...	amet ut do
✏	✖	12345	10760321		od.	magna euis
✏	✖	12345	108608232	Filter Clear	d...	diam erat a
✏	✖	12345	113884149	euismod do...	aliquam no...	diam nibh

3. Enter your criteria value. For example: "105406252". Then, click **Filter**.

4. The grid will refresh to show the records that match the specified filter.

5. To remove the filter, click the filter icon of the appropriate column and then click **Clear**.
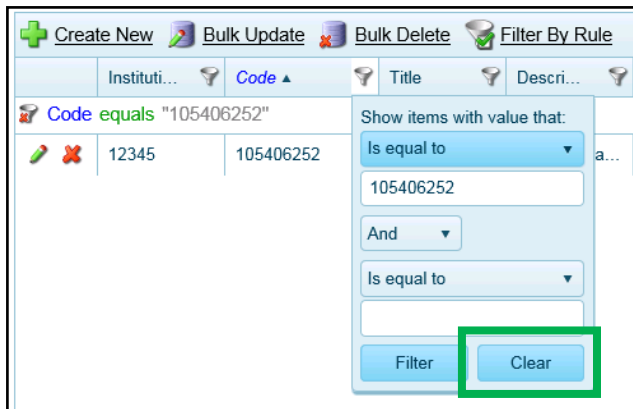
iii. Filtering by Validation Rule

You can also filter the data based on the validation rules.

1. On the **Courses Submission** page, click **Advanced Filter, Filter by Rule**.
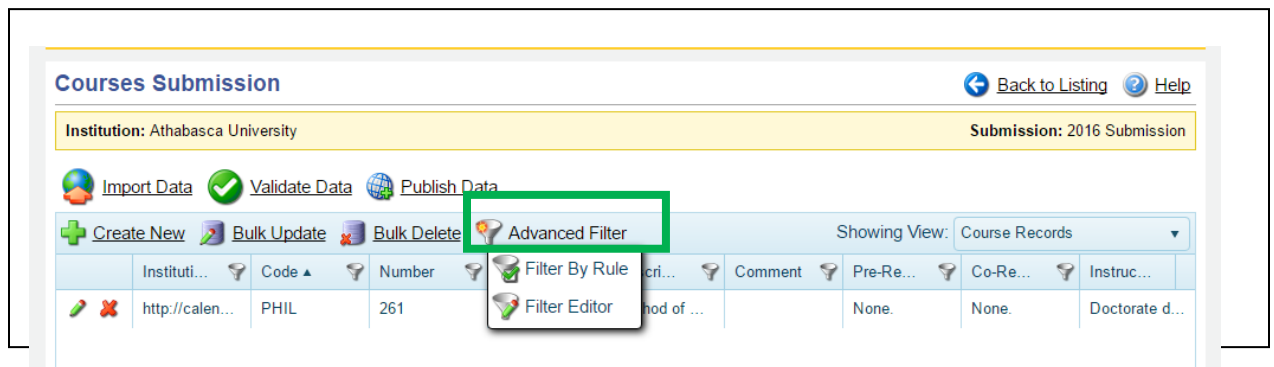
2. The **Filter by Rule** window is displayed. Click the desired rule for filtering your data.

3. The **Filter by Rule** window will close, and the **Courses Submission** page will refresh to show the records matching the rule.

4. Once you have completed reviewing the filtered entries, click on the clear filter icon for the indicated filter rule.

3. The **Courses Submission** page will refresh to show all entries on the screen.

Exporting Data from DCaR into CSV Files

This section will explain how to export data you have uploaded to DCaR into a CSV file, using the Courses Submission module as an example.

> **Important:** See how-to video—DCaR Modules . Exporting Uploaded Data and Errors from DCaR into a CSV File.

i.   Exporting a CSV File from DCaR for All Unpublished Records

1. Once you have uploaded data into DCaR by completing:
   - the **Import Data** process (Step 1), and/or
   - validation of this data using the **Validate Data** process (Step 2),

   you can **export** a copy of your **unpublished data (including records with and without errors)** into a CSV file by clicking on the **Export** function.

Click on Export to begin to export uploaded data from DCAR into a CSV file.

2. An **Export Data** screen will appear. You can select to export **Filtered Only** data (if you have already previously selected a filter) or export **All Data** if you wish to download a copy of all your uploaded, **unpublished** data records from DCaR.

> **Important:**
> When exporting your DCaR data into a CSV file, if you complete this export **after validating your data** and **before publishing** any of the data to the Catalog, you will be able to **export a complete copy of your unpublished file – both records with and without errors**.

3. Select **Export Data** to begin the Export (downloading) of your DCaR data. Following completion of the export, a message will appear confirming the submission data was successfully exported to a CSV file. Following viewing of this message, click **Close**.
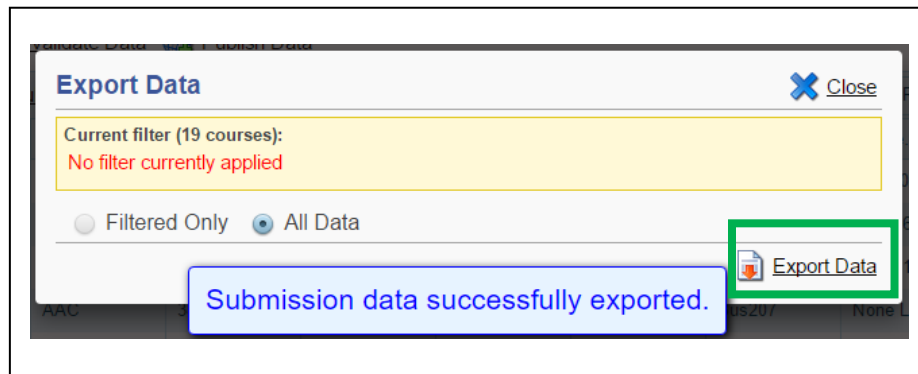
4. The **successfully exported file** of **unpublished records** will appear at the bottom of the screen. Click on the **arrow** to the right of the file name to **open the file** as desired.

5. Open the CSV file and save and use as needed. The file contains a complete downloaded copy of the **unpublished data** that you have uploaded into DCaR, including records with and without errors if you exported the file after completing data validation and before publishing any records.

ii. Exporting a CSV File for Uploaded Records with Errors Only

1. Once you have uploaded data into DCaR by completing:
   - the **Import Data** process (Step 1),
   - validation of this data using the **Validate Data** process (Step 2), and
   - publishing of the data without errors using the **Publish Data** process (Step 3),
   you can **export a copy of your unpublished records that contain errors only** into a CSV file by following the same **Export** steps outlined for Exporting a CSV File from DCaR for All Unpublished Records.

> **Important:**
> When exporting your DCaR data into a CSV file, if you complete this export **after validating your data** and **after publishing** all data without errors to the Catalog, you will be able to **export a complete copy of your unpublished file containing records with errors only**.

iii. Exporting a CSV File for Published Records from the Catalog

2. To use this feature, you will need to first upload data into DCaR by completing the **Import Data** process (Step 1) by selecting the option to **import all of your courses (or programs or agreements) from the Catalog into DCaR**.
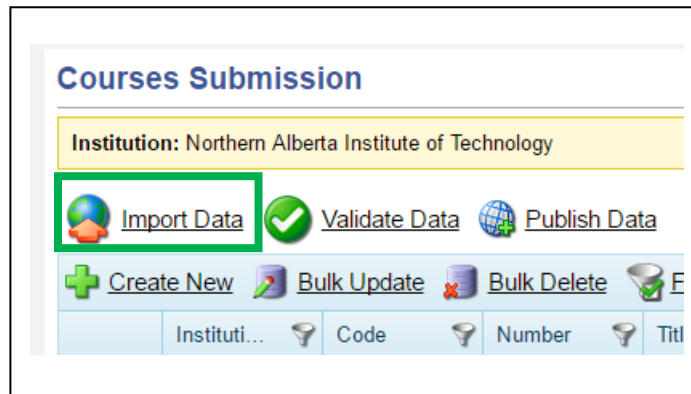
> **Important:**
> - When **importing a copy of your published Catalog data back into DCaR**, it is important that you are aware that it will **overwrite any unpublished DCaR data you already have in DCaR**.
>
> - As this Catalog data is a **copy of what has already been published**, use of **the import feature would be view a copy of your published Catalog data in DCaR or to export a copy of this data into a CSV file of all of your courses, programs, or agreements Catalog data**. There would be no need to re-publish this already published data unless you are making updates.
>
> - Once you upload a new CSV file to DCaR, your imported copy of the Catalog records will no longer be visible in DCaR, but will still be safely published in the Catalog.

2. Select **Import from Transfer Catalog** and **Confirm**.

6. You can now **Export a copy of all of your published Catalog records** into a CSV file by selecting **Export** and following the same **Export** steps outlined for Exporting a CSV File from DCaR for All Unpublished Records.

CSV File Format Terms – Course Submission File

The following is a listing of definitions for the information included in the Course CSV File Format for the Course Submission file.

Course CSV File Format Terms	Description of/Definitions for Terms
Institution Course ID	Institution-provided unique course ID identifiers used at the institution for their courses (e.g., "25433", "C1234"). Institutions are responsible for providing these unique course IDs to correspond with their own systems. ACAT will also use this unique course ID within the Learner Pathways Catalog and System.
Code	An institution-provided unique course code identifier for each of its courses (e.g., "CHEM" in CHEM 101). The institutions are responsible for providing this unique course code to correspond with their own systems. ACAT will also use this unique course code identifier within the Learner Pathways Catalog and System.
Title	Institution-provided unique course titles for their courses (e.g., "Introductory University Chemistry I"). Institutions are responsible for providing these unique course title identifiers to correspond with their own systems and transcripts. ACAT will also use this unique course identifier within the Learner Pathways Catalog and System.
Description	Institution-provided course and program descriptions for their offerings (e.g., institution academic calendar descriptions). The Institution is responsible for providing these descriptions to correspond with their own systems and academic calendars. ACAT will also use this description within the Learner Pathways Catalog and System.
Comment	Institution-provided course comments for their courses that will be publicly accessible (e.g., a footnote, a disclaimer). Institutions are responsible for providing comment information to correspond with their own systems. ACAT will also use this information provided within the Learner Pathways Catalog and System.

Course CSV File Format Terms	Description of/Definitions for Terms
Number	Institution-provided unique course numbers (e.g., number "101" in CHEM 101) for their courses. Institutions are responsible for providing these unique course number identifiers to correspond with their own systems. ACAT will also use this unique number identifier within the Learner Pathways Catalog and System.
Pre-requisite	A Course or credit that must be completed before a more advanced course can be taken (e.g., "pre-requisites" of this course offering).
Co-requisite	A course or credit that must be taken at the same time as another course (e.g., "co-requisites" of this course offering).
Instructor Qualifications	Description of the institution-provided Instructor Qualifications required for the course being offered. The Institution is responsible for providing the description to correspond with their own systems. ACAT will also use this information within the Learner Pathways Catalog and System.
Instruction Type	Instruction type is used to manage or identify the type of instruction basis for the course. Types can range from hours to system defined types such as Lab; Lecture, Seminar; Tutorial; and others, as well as the number of hours (e.g., "20H Lab, 1000H work experience hours").
Credit Type	Course credit type is used to manage the type of credit associated with the course. Credit Type can range from credits to work experience (but are not limited to).
Credit Value	The value assigned to a course that refers to the credit value for the purpose of counting its value towards a credential such as a certificate, diploma or degree. Number signifying the value of credit (0.00-9999.99) that may be related to the number of hours of instruction. The majority of academic courses are worth three credits, with some variance depending on the program and institution. Many degrees require 120 credits.

Course CSV File Format Terms	Description of/Definitions for Terms
Credentials	Is official documentation recognizing completion of a course of study/program area that is issued by the individual institution, to be awarded after a student has successfully completed all of the curricular requirements, normally including the accumulation of a minimum number of credits. Credentials (Post-secondary System Defined) can include Diploma, Preparatory / Upgrading, University Transfer, Applied, Degree Undergraduate Degree, and Certificate.
Categories	Refers to the grouping or classification of courses by field of specialty (e.g., "Chemistry"). This is defined and managed by the institutions.
Outline URLs	Uniform Resource Locator (URL) that consists of the web address where the individual institution stores the course or program outline for public access.
Review Date	("YYYY-MM-DD") indicating the date or triggering a reminder for the institution to review the course for accuracy.
Effective Start Date	("YYYY-MM-DD") indicating the start date for the course. The first date the offering detail was applicable or Active.
Effective End Date	("YYYY-MM-DD") indicating the end date for the course. The last date the offering detail was applicable or Active.
Delete Record	In the CSV File Format, "Yes"/"No" asks the institution if this is a request to delete a course/program/agreement (e.g., if the course, program, or agreement being submitted is currently in the Catalog and should now be deleted (Answer to DeleteRecord = "Yes")), or if the item being submitted is a request to add a new item to the Catalog (e.g., Answer to DeleteRecord = "No").

CSV File Format Terms – Program Submission File

The following is a listing of definitions for the information included in the Program CSV File Format for the Program Submission file.

Program CSV File Format Terms	Description of/Definitions for Terms
InstitutionProgramID	Institution-provided unique program ID identifiers used at the institution for their programs (e.g., "25433", "P1234"). Institutions are responsible for providing these unique program IDs to correspond with their own systems. ACAT will also use this unique program ID within the Learner Pathways Catalog and System.
Code	An institution-provided program code identifier for each of its programs (e.g., "Faculty of Engineering"). The institutions are responsible for providing this program code to correspond with their own systems. ACAT will also use this program code identifier within the Learner Pathways Catalog and System.
Title	Institution-provided unique program titles for their programs (e.g., "Pharmacy Technician"). Institutions are responsible for providing these unique program title identifiers to correspond with their own systems and transcripts. ACAT will also use this unique program identifier within the Learner Pathways Catalog and System.
Description	Institution-provided course and program descriptions for their offerings (e.g., institution academic calendar descriptions). The Institution is responsible for providing these descriptions to correspond with their own systems and academic calendars. ACAT will also use this description within the Learner Pathways Catalog and System.
Comment	Institution-provided program comments for their programs that will be publicly accessible (e.g., a footnote, a disclaimer). The institutions are responsible for providing comment information to correspond with their own systems. ACAT will also use this information provided within the Learner Pathways Catalog and System.

Program CSV File Format Terms	Description of/Definitions for Terms
Admission Requirement(s)	Refers to a set of criteria stipulating education, training or experience needed for eligibility to enter an educational program or occupation. These vary by institution, credential type, and program, and may include grades, exam scores, portfolios or auditions, supplementary applications, videos, prior learning and experience, and so forth. The Institution is responsible for providing, managing and administering their admission requirements from their own systems. ACAT will also use the admission requirements provided within the Learner Pathways Catalog and System.
DateFirstOffered	Institution provided date first offered for their program. The institution is responsible for providing the date first offered from their systems. ACAT will use the date first offered within the catalog system.
PreRequisite	A Course or credit that must be completed before a more advanced course can be taken (e.g., "pre-requisites" of this course offering).
CoRequisite	A course or credit that must be taken at the same time as another course (e.g., "co-requisites" of this course offering).
CreditType	Program credit type is used to manage the type of credit associated with the program. Credit Type can range from credits to work experience (but are not limited to).
CreditValue	The value assigned to a program that refers to the credit value for the purpose of counting its value towards a credential such as a certificate, diploma or degree. Number signifying the value of credit (0.00-9999.99) that may be related to the number of hours of instruction. The majority of academic courses are worth three credits, with some variance depending on the program and institution. Many degrees require 120 credits.
Credentials	Official documentation recognizing completion of a course of study/program area that is issued by the individual institution, to be awarded after a student has successfully completed all of the curricular requirements, normally including the accumulation of a minimum number of credits. Credentials (Post-secondary System Defined) can include Diploma, Preparatory /

Program CSV File Format Terms	Description of/Definitions for Terms
	Upgrading, University Transfer, Applied Degree, Undergraduate Degree, and Certificate.
Categories	Refers to the grouping or classification of instructional programs by field of specialty that is defined, managed and administered by the institution within the Learner Pathways Catalog and System. This field will be pre-populated with a set list of predefined values established by the institutions and will be displayed as system-defined fields.
Major	Refers to the main focus or specialized area of study (e.g., psychology or mathematics), usually specified in a credential (e.g., B.A Psychology), and is provided in the Learner Pathways Catalog and System by the institutions. ACAT will use this information to display in the Catalog.
OutlineURLs	Uniform Resource Locator (URL) that consists of the web address where the individual institution stores the course or program outline for public access.
ReviewDate	("YYYY-MM-DD") indicating the date or triggering a reminder for the institution to review the course, program, or agreement for accuracy. This data can be provided by the institution at their discretion. If this field contains no information, the Learner Pathways Catalog will automatically populate a review data 5 years from the provided start date.
EffectiveStartDate	("YYYY-MM-DD") indicating the start date for the course, program, or agreement. The first date the offering or agreement was applicable or Active.
EffectiveEndDate	("YYYY-MM-DD") indicating the end date for the course, program, or agreement. The last date the offering or agreement was applicable or Active.
DeleteRecord	In the CSV File Format, "Yes"/"No" asks the institution if this is a request to delete a course/program/agreement (e.g., if the course, program, or agreement being submitted is currently in the Catalog and should now be deleted (Answer to DeleteRecord = "Yes")), or if the item being submitted is a request to add a new item to the Catalog (e.g., Answer to DeleteRecord = "No").

CSV File Format Terms – Agreements/Decisions Submission File

The following is a listing of definitions for the information included in the Agreements CSV File Format for the Agreements/Decisions Submission file.

Agreements CSV File Format Terms	Description of/Definitions for Terms
InstitutionAgreementID	Institution-provided unique agreement ID identifiers used at the institution for their agreement (e.g., "25433", "A1234"). Institutions are responsible for providing these unique agreement IDs to correspond with their own systems. ACAT will also use this unique agreement ID within the Learner Pathways Catalog and System.
AgreementType	Refers to the type of agreement accepted by the To Institution. The agreements can be defined as 'Specific Program' referring to a program to program agreement/decision, 'Specific Course' referring to courses to courses agreement/decision where both two and from courses are defined or 'Unspecified Course' referring to courses to courses agreement/decision where To Course maybe unspecified (ex AC 1xx)
FromInstitution	Refers to the institution from whom the student will be transferring from. This was **previously referred to as the 'Sending Institution'**. The 'To Institution' is responsible to provide this information from a set of institutions included within the Learner Pathways Catalog.
FromOffering	Refers to the course or program code and number (ex AC 100) offered by the 'From Institution' included in the agreement or decision.
ToOffering	Refers to the course or program code and number (ex AC 100) offered by the 'To Institution' included in the agreement or decision.
Comment	Institution-provided course comments for their courses that will be publicly accessible (e.g., a footnote, a disclaimer). The institutions are responsible for providing comment information to correspond with their own systems. ACAT will also use this information provided within the Learner Pathways Catalog and System.

Agreements CSV File Format Terms	Description of/Definitions for Terms
CreditType	Course credit type is used to manage the type of credit associated with the course. Credit Type can range from credits to work experience (but are not limited to).
CreditValue	The value assigned to a course that refers to the credit value for the purpose of counting its value towards a credential such as a certificate, diploma or degree. Number signifying the value of credit (0.00-9999.99) that may be related to the number of hours of instruction. The majority of academic courses are worth three credits, with some variance depending on the program and institution. Many degrees require 120 credits.
Credentials	Is official documentation recognizing completion of a course of study/program area that is issued by the individual institution, to be awarded after a student has successfully completed all of the curricular requirements, normally including the accumulation of a minimum number of credits. Credentials (Post-secondary System Defined) can include Diploma, Preparatory / Upgrading, University Transfer, Applied, Degree Undergraduate Degree, and Certificate.
ReviewDate	("YYYY-MM-DD") indicating the date or triggering a reminder for the institution to review the course, program, or agreement for accuracy. This data can be provided by the institution at their discretion. If this field contains no information, the Learner Pathways Catalog will automatically populate a review data 5 years from the provided start date.
EffectiveStartDate	("YYYY-MM-DD") indicating the start date for the course, program, or agreement. The first date the offering or agreement was applicable or Active.
EffectiveEndDate	("YYYY-MM-DD") indicating the end date for the course, program, or agreement. The last date the offering or agreement was applicable or Active.
DeleteRecord	In the CSV File Format, "Yes"/"No" asks the institution if this is a request

Agreements CSV File Format Terms	Description of/Definitions for Terms
	to delete a course/program/agreement (e.g., if the course, program, or agreement being submitted is currently in the Catalog and should now be deleted (Answer to DeleteRecord = "Yes")), or if the item being submitted is a request to add a new item to the Catalog (e.g., Answer to DeleteRecord = "No").

Data Dictionary

For additional information regarding Learner Pathways System definitions, please refer to the Learner Pathways System Data Dictionary.

Contact Information for Help

For Learner Pathways System comments or questions:

ACAT Secretariat
Email: ae.lps@gov.ab.ca

For technical issues:

Post-Secondary Institution Help Desk (PSI)
Phone: 780 427-5318 option 6
Email: psihelpdesk@gov.ab.ca

Note: For toll-free access within Alberta, dial **310-0000** first.