Xitracs™ User Guide

Version 5.01a

Xitracs™ User Guide

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1 Introduction

1.1 Overview

The **Xitracs™ System** is designed to help organizations manage their compliance reporting, planning and assessment processes. It is based on the latest web technology, meaning that the system can be accessed over an intranet/internet connection using a browser and without the need to install any software on a user's local workstation.

Access to the system is controlled by a User ID and password.

The system includes an number of modules which are available depending on the software licensed and a user's role.

Xitracs Standards™ provides a structured means of gathering and managing all of the information required for an agency compliance report submission, using a pre-configured compliance matrix that is available for the major accreditation agencies. Additional agency standards can be added as required, to meet the needs of other compliance and regulatory bodies.

Participants in the process of preparing and reviewing submissions are assigned to teams, which in turn are assigned to one or more standards or requirements. The status of each standard can be set and tracked, together with an optional date to indicate when a particular item is due. Access to materials can be controlled, based on a team member role. The narrative and supporting evidence, which may consist of one or more electronic files, are automatically linked and stored. A log keeps track of the activity for each standard and progress reporting is available. Additional materials, including instructions and examples, may optionally be stored in a Resource Library and linked to each standard.

At any point in the process, an internal draft of the complete submission may be generated to enable the director or relevant institution committee to view how the submission will look. When the project is complete, the final submission may be published in Website, PDF or Microsoft Word® formats, for printing, capture to Flash Drive or DVD. Website report submissions can be made available online to agency reviewers and accessed controlled by logon and password. Responses from the agency may be logged and the compliance approval status of each standard or requirement may be flagged. Where required, a Plan can be added to the relevant standards. Prior submissions and responses may be archived for future reference and audit purposes.

Xitracs Credentials™ enables users to enter and manage faculty qualification and course syllabus information, plus supporting documents. This data can then be used to generate static or dynamic reports.

For each faculty member you can track details, qualifications, licensure and certifications along with a curriculum vitae (CV) and supporting documents, such as transcripts. Courses and sections for each semester can be recorded and a syllabus for each section stored for reporting and archiving. You can specify which qualification is applicable to each section taught by a faculty member. If there is a justification required you can record a comment.

Accrediting Agency reports such as a Faculty Roster in PDF format can be generated with a single click. A dynamic website view lets you to provide a secure online access to authorized external reviewers who can then search for additional credentials information. You have the option to control what documents and other data that each reviewer is able to see. Built-in management reports show you where there are missing elements, such as faculty without qualifications or course sections without a syllabus.

Xitracs Planning™ enables users to build plans and assign sections and due dates to team members.

Plans can be linked dynamically, so department plans can report to division plans which in turn can report to institution plans and so on. A timeline feature lets you select a planning cycle by plan, so annual operational plans can link to five-year strategic plans. You can connect plans and budgets and get a snapshot of progress across the institution. The built-in survey tools let you collect input from faculty which can then be linked to objectives and goals. A plan Management Snapshot is included, allowing you to view progress of plan completion. Navigation is made easy via a graphical plan mapping view, which shows you the elements within each plan and the hierarchy of plan linking.

Authorized users can easily build plans, assign tasks with due dates and then link them by reference to other plans. Documents and other files can be added as supporting artifacts. Progress can be tracked with built-in reports and each plan published to a website or PDF document with a click.

Xitracs Programs™ provides a flexible and intuitive solution to managing program assessment reporting and curriculum mapping online.

Programs are managed to a time-frame, so that input across multiple cycles can be tracked and reported on. A flexible field set feature lets you define what input is needed and when. Reports can be output to a website, in PDF or Excel format. Programs can be grouped and linked to departments and disciplines. A powerful search feature makes it easy to find information by keyword.

Curriculum maps can be generated for each program.

Xitracs Assessment™ lets you create assessment reports quickly and easily. You can create tasks to collect and score sample student artifacts, link them to outcomes and score them using rubrics.

Faculty can also add outcomes assessment data at course section level. This data can optionally be fetched from a gradebook column, depending on the LMS used.

Datasets are created for each assessment, providing a comprehensive and permanent record of information gathered.

The **Xitracs Portal™** provides an intuitive and easy means of sharing information and gathering data from faculty and staff.

1.2 Getting Started

Xitracs is an easy to use web application that you can access via your browser.
We recommend using Mozilla Firefox ® Version 25 or later, Microsoft Internet Explorer ® Version 9 or later, Apple Safari ® for MAC Version 5 or later or Google Chrome ® Version 30 or later.
If you are using Internet Explorer, use the Compatibility View for optimal presentation.
Do not use beta (pre-release) versions of browsers as they may cause problems with system presentation.

Logging On

1. Enter the **URL address** of you Xitracs system in your browser
2. Logon to your Xitracs system by entering a **User ID** and **Password**.
3. Click the **Logon** button or use the **Enter** key.
4. To log off from the Xitracs system, click the **Logout** link at the top of any page.

Depending on your organization's password management policy, a **Forgotten Password** link may be provided on the logon page.

Each time you log on, a **Session** is created with the host application. This is a security feature. If you are inactive for some time, the session will automatically expire and you will need to logon again.

Most functions in the system are accessed by clicking a Link which will be underlined, for example Click me.

If you need to go back to a previous page, use the  button at the top right hand corner of page, rather than using your browser's back button.

Context sensitive help is available by clicking the  button.

Most actions require that you click the 

button to complete the function. If you want to go back before completing use the 

button.

1.3 Home Page

After successfully logging on to the Xitracs system, the home page is presented. You can return to this page at any time by clicking the **Home** tab.

The default home page view consists of four of panels as follows:

Announcements

Informational announcements posted by your administrator are shown. For longer announcements a "..**more**" link will be displayed. Clicking on this link will open up all the announcements in a separate pop-up window.

If you have a system administrator role you can create and manage announcements.

Xitracs News

Informational announcements posted by Concord Support Services will appear from time-to-time. You can also access the Client Portal to view documentation and add and track support tickets.

Calendar

The calendar displays today's date in red and highlights any due dates or events with a link. Clicking on a date takes you to the relevant section(s).

See the calendar function for more information about this feature.

My Recent Activity

Depending on the module you are logged in to, a list of the last seven sections of the standards, credentials, plans or programs which the you have been editing the narrative are displayed. Clicking on a link takes you to the relevant item.

My Notes

You can post short messages for yourself, such as reminders or notes. Just click on the icon and add or edit text.

1.4 Tab Menu

The main functional areas in the Xitracs system are accessed by clicking on a tab at the top of the page.

The modules and tabs available to you will vary depending on your role in the system. This is controlled by a System Administration function.

The active tab will be highlighted, as in the example above.

You can choose an available module by using the drop-down selector to the right of the tabs.

Access to the System Administration functions is only available to users with a system role of Administrator.

1.5 User Details

You may edit the following information by clicking on the **User Details** link at the top of the page.

- First and Last Names
- Email Address

1. Click **User Details**
2. Click **Change Details**
3. Enter the new information and click **Submit**

Note: Your User ID cannot be changed

If enabled by the local system configuration, you may also be able to change your password.

1. Click **User Details**
2. Click **Change Password**
3. Enter the new information and click **Submit**

Note: Passwords cannot normally be changed by a user if the Xitracs system has been configured to use a central authentication service, (for example - Active Directory). In this case, the Change Password link will not appear.

If the system is configured to provide email alerts of calendar due dates, the function may be managed by clicking the **Change alert settings** link.

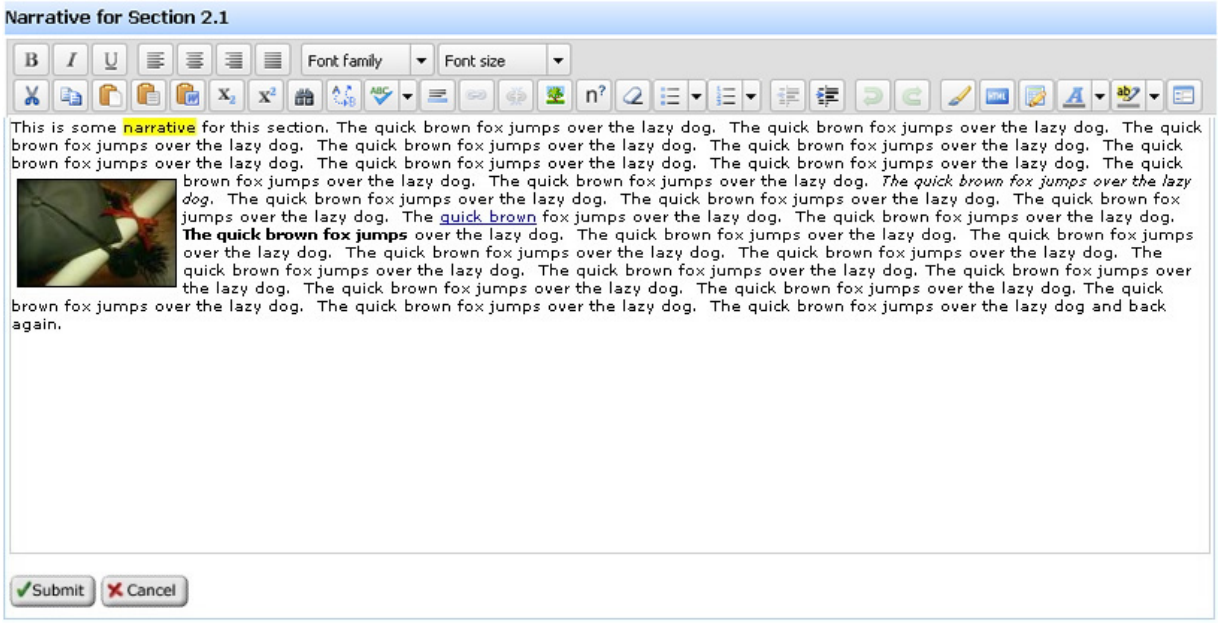
1. Check **Enabled** to switch on or uncheck to switch off
2. Select preferred email **frequency**
3. Click **Submit**

Any teams that you belong to will be listed, together with your team role.

1.6 Using the Text Editor

The built-in WYSIWYG *(What You See Is What You Get)* text editor lets you enter narratives, preambles, reports and responses.
The editing functions are similar to those found in a typical word processing application. The default font style for the editor is Arial 11pt.

⚠ *While the editor provides considerable freedom in formatting text, most agencies prefer a simple and consistent text style. Changing fonts and text sizes within the same or across multiple narratives may detract from the look of a published document or website and is not recommended.*



Narrative for Section 2.1

This is some narrative for this section. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. *The quick brown fox jumps over the lazy dog.* The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. **The quick brown fox jumps** over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog and back again.

⚠ *After you edit narrative, do not forget to click the* ***Submit*** *button.*

Hyperlinks may be added by highlighting text first and then clicking the **link** icon in the toolbar or by using the mouse right-click function. To remove a hyperlink use the **unlink** icon. Links can be replaced automatically by end-note references in a published submission if the end-note function is available in the presentation template. See Control Panel > Presentation templates.

To insert an image click on the **add image** icon and select an image file from the drop-down. You can format the image further by clicking on the **Appearance** tab.
⚠ *A hyperlink reference or image file must already exist in the evidence list for the section in order to appear in the drop-down.*

Create a table by clicking on the **add table** icon. Right click on the table to make any format changes.

Insert a break in the published PDF document by clicking the **page break** icon.

⚠ *To avoid possible right margin text overflow in a PDF document submission, avoid including tables or images that exceed 600px in width.*

For footnotes, use the superscript icon then create a list of footnotes at a suitable place in the narrative. *(This is a manual function).*

You can check the number of words in the narrative by clicking on the icon.

To find and replace a word click on the icon.

To remove formatting previously applied, highlight on the word or words and click on the **remove formatting** icon.

Click on the **full-screen** icon to toggle between full and normal view of the text editor.

Some useful tips that will help minimize formatting issues when copying and pasting text from other documents:

- Text copied from another narrative should be pasted using the **paste as plain text** icon.
- Text copied from another document, e.g. a web page, should be pasted using the **paste as plain text** icon.
- Text copied from an MS Word® document should be pasted using the **paste from Word** icon.
- Tables copied from another document should be pasted using the **paste as plain text** icon.

Information copied and pasted from other sources may contain proprietary formatting characters or invalid links. This may cause problems later when publishing a submission.
*Check the quality at any time by using the **Preview** function.*
If an invalid link has been pasted, a warning message will be generated when you update the narrative.
See also Link Check Report.

If your system is configured to allow direct editing of the narrative HTML, the **HTML function** will be present.
Click on the icon to open an HTML editing window. This also provides access to the **Word Redo** function. Use this function to remove embedded formatting from a pasted Word document.
See also Narrative Cleanup tools.

2 Xitracs Assessment™

2.1 Overview

The **Xitracs Assessment™** module allows you to perform two types[1] of student assessment functions:

1. Sample student assessments against one or more Gen-Ed, External (e.g. Agency) or Program outcomes using an associated rubric. These are termed **General Assessments**.
2. Scoring counts for students in a course section against outcomes. These are termed **Course Assessments**.

General Assessments

With this feature, it's easy to set up and manage assessment workflows of student work by semester and report rubric scores against specified outcomes. You can assign one or more scorers to a workflow.

Course Assessments

With this feature, teaching faculty can easily enter Met, Not Met and Exceeded counts for mapped general or program outcomes which have been mapped to a course.
For institutions using the Blackboard® LMS, an optional Building Block is available to select the count data from a gradebook column.

[1]*Depending on features licensed*

2.2 Course Assessments

2.2.1 Section-level Assessment

Xitracs provides a simple and intuitive way for teaching faculty to add student score information at a course section level. Scores relate to outcomes that have been mapped or optionally selected.
Entry of this scoring information is via the Xitracs Portal. A faculty member can select one or more mapped outcomes to be scored in the section.
The counts of Met, Not Met or Exceeded can then be added, either by manually keying the data or by linking the assessment to a gradebook column in the Learning Management System (LMS)*.

For completed assessments, a summary report is available. See Courses > Section > Assessment.

More extensive reports are also available. See the Reports tab.

** Gradebook column linking is an optional feature and is currently available for Blackboard®. Check with your Xitracs representative for additional LMS availability.*

2.3 General Assessments

2.3.1 Create a Workflow

General assessments are managed through workflows which contain two steps, the first of which is optional:
(1) Adding Student Artifacts and (2) Scoring.

Once a workflow is started, each step is assigned to the relevant user (e.g. teaching faculty) for action via the Xitracs Portal.

To create a new assessment workflow

1. Click on the Assessment Tab
2. Click the **Create** link
3. Enter a **Name** for the workflow, e.g. SP2015-Assmt01
4. Select the semester from which the course section and students will be selected
5. Enter a **Report Due** date in the format MM/DD/YYYY. The default value is 3 months from the date the workflow is created.
6. Enter the number of student **artifacts** that will need to be uploaded. If this value is set to zero, the **Upload Artifacts** step will be skipped unless the **Optional** parameter is checked.
7. Enter an **Artifacts Due** date in the format MM/DD/YYYY. The default value is 1 month from the date the workflow is created
8. Optionally enter artifact upload **instructions** which will be displayed with the task to the faculty teaching the selected course section(s)
9. Enter an **Scores Due** date in the format MM/DD/YYYY. The default value is 2 months from the date the workflow is created.
10. Optionally enter scorer **instructions** which will be displayed with the task to the selected faculty scoring the artifacts
11. Click **Submit**

The new workflow will be added to the workflow list for the selected semester; the status will be **Not started - Incomplete details**

Click the Details link next to the listed workflow to complete the required information.

2.3.2 Workflow Datasets

When a workflow is complete, a dataset is generated for each outcome associated with the assessment. A dataset is in MS Excel® format and includes the detailed data from the assessment.

You can select one or more datasets to generate an aggregated spreadsheet.

Note that a dataset is a snapshot of the assessment. If you change a rubric value or threshold in a later semester, it will not affect the data for a prior assessment.

2.3.3 Workflow Details

The details of an assessment workflow must be completed before it can be started. You can also change information that was entered in the create step using the **Edit** link associated with a field.

Add Outcomes

One or more outcomes must be associated with an assessment workflow. Click the **Add outcomes** link and select an available outcome. Note that only those outcomes that have a linked rubric can be selected.

Optionally set a **Threshold** for the outcome rubric by clicking the **Level** link. This information is used in downstream assessment reports. For example, the associated rubric may have a maximum potential score of 20 and the threshold for this specific assessment workflow could be set to 15. Note that the threshold you set will be for this assessment only; in this way, you could set higher thresholds for subsequent assessments if you want.

Add Sections

Select the course section(s) to be associated with the assessment. This will determine (a) the faculty teaching the selected courses who will be asked to submit artifacts and (b) the students that you are able to select (see below).

Add Students

Click the Add student link next to each of the sections you have chosen. Start typing a student name or ID in the search box to find a student. You can also click the Select link to list and select students. Note that only those students who have been enrolled in a course section will be available for selection. Alternatively, use the **Import** link to add students directly into the workflow and enroll in the course section (if not already enrolled). *See the publication "Xitracs Data Import Guide" for details on file content.*

Artifacts Required

By default, the number of artifacts to be uploaded is set at 1. You can optionally increase this number, if required. Check the Optional parameter if artifacts can be uploaded but are not mandatory. Set to zero if no artifacts are required.

Add Scorers

Click the Add scorer link and select one or more portal users (faculty and staff) that will be assigned the task to score uploaded students against the selected outcome(s) using the linked rubric.

Click the **Map** link to assign specific students to scorers. Use the **Students taught scan** link to determine if any scorers are teaching one or more of the listed students. Use the **Edit map** link to change the settings.

Scorers with a completely blank column will have access to all students listed. Scorers with one or more mapped entry in a column, including an entry of "Student", will only have access to those students showing "Can Score".
Once a workflow enters the Scoring step, the anonymous name give to each student will also be displayed.

Start a Workflow

Once all of the above information is complete, you will be able to start the workflow. Click the **Start** link next to the Current Status row on the details page. You will be taken to a page where you can confirm all of the workflow information is complete. When the workflow is started, those assigned to upload artifacts will automatically receive an email advising them of the new task. If the required number of artifacts is zero and the Optional parameter has not been set (see above), the workflow will move directly to the Scoring step. When artifact uploading is complete, those assigned to do the scoring will then receive an email advising them of the new task.

⚠ **Caution!** Once a workflow has been started, you will not be able to change certain details of the assessment, depending on the stage of the workflow. (See below).

Force Next or Force Complete

Once a workflow has started, the system will automatically track progress and move the status from the **Adding artifacts** step to the **Scoring** step to the **Workflow** complete step.
You can manually move to the next available step by using the **Force next** or **Force complete** link.

Modify a Workflow

Certain parameters in a workflow can be changed, depending on the stage.

Parameter / Stage	Not Started	Adding Artifacts	Scoring Artifacts	Complete
Edit Workflow Name	Y	Y	Y	Y
Delete Workflow	Y	Y	Y	Y
Add or Delete Outcomes	Y	N	N	N
Add or Delete Sections	Y	N	N	N
Add or Delete Students	Y	Y	Y	N
Add or Delete Scorers	Y	Y	Y	N

Workflow Progress

Click this link to see a snapshot of the status of the workflow tasks.

Complete a Workflow

Once all of the artifacts have been uploaded and scored, the workflow will automatically complete and the assessment report will be generated. An option to manually **force completion** of a workflow is also available by clicking on the link in the status row.

Delete a Workflow

A workflow can be deleted. This will remove any associated tasks from a faculty member's portal. Any datasets that have been generated by a completed workflow must be deleted separately.

2.3.4 Workflow List

Any assessment workflows that have been created will appear in a list sorted by semester. You can change the semester using the select function at the top right of the list.

The list includes information about each workflow, including the status, due dates, number of students, scorers, outcomes and notes. Click the Details link to add or edit information about the workflow.

The percentage values in the Students and Scorers columns show how complete that phase of the workflow is. Click the Progress link for more information.

Click the Notes link to add a comment about the workflow. The Narrative link lets you add a preamble to the assessment report. If the workflow is complete, the Report link will appear.

If one or more workflows is complete, you will be able to generate a dataset report in Excel® format by clicking the **Download** link.

2.3.5 Workflow Narrative

If a workflow is complete, you can add a preamble to an assessment report. In the workflow list, click on the **Narrative** link to add a narrative or edit an existing narrative.

Each time you update the narrative a new version of the assessment report is generated.

2.3.6 Workflow Notes

Click on the **Notes** link in the workflow list to add a note about the assessment. This is a useful tool for keeping a record of any additional information you may want to add about the assessment, or to communicate to those uploading or scoring artifacts.

2.3.7 Workflow Progress

You can check the detailed status of a workflow that has been started by clicking on the Progress link.

The status of Adding artifacts and Scoring artifacts by each assigned user is displayed. You have the option to add or remove artifacts on this page, on behalf of a faculty member.

Note that once all of the artifacts have been uploaded and scored, the workflow will automatically complete and the assessment report will be generated. An option to manually force completion of a workflow is also available on the workflow details page.

2.3.8 Workflow Report

Once a workflow is complete, an assessment report PDF format is automatically generated. Click the Report link to view. If a narrative is added, a new version of the report will be generated. The report includes information for each outcome linked to the workflow.

You can also view an outcome-specific version of the report by going to the Outcomes tab where a Dataset for each completed workflow is also available.

2.4 Courses

2.4.1 Courses

You can search for courses in the catalog and view the course details, course outcomes (if defined), programs (if linked) and course sections.

Click the **Details** tab to view course information from the catalog.

Click the **Outcomes** tab to view any course outcomes, plus any linked general or program outcomes. In the Outcomes tab view you can create a list of mapped general and program outcomes (if defined) by clicking on the **Add link** function. These links determine which outcomes will display to the teaching faculty as mapped in the Xitracs Portal. (Courses > Assessment).

Click the **Programs** tab to view a list of programs where the course is included. Click on the **Outcome map** link to see where outcomes are assessed in the program.

Click the **Sections** tab to view any course sections for the current semester. Click the **Show prior semesters** link to view earlier sections.
In the Sections tab view, click the **Assessment** link to view the summary assessment data (if available) for a course section.

2.5 Outcomes

2.5.1 Outcomes Library

The Outcomes Library is a convenient way to manage outcomes.

General Education (Gen-Ed) and External (e.g. Agency) outcomes can be viewed by group. Outcome **Groups**, Outcome **Sets** and the outcomes themselves are defined via the Control Panel > Manage outcomes.

Program outcomes are viewed by School > Department > Program.

Click the **Details** link to view any assessment reports associated with a general outcome. If there are workflows that included the outcome, these will be listed by semester. If a workflow is complete, click the View link to open the assessment report.

For each completed general assessment, a **Dataset** will be available. This includes the quantitative information in an MS Excel® format.

For an outcome set or program, click the **View map** link to courses where each outcome is assessed. This mapping is generated by the outcome links associated with a course. See Assessment > Courses > [Course] > Outcomes. If course level has been defined in the catalog, a column will be generated for each respective level. Otherwise, courses will be listed in a Level N/S (not specified) column.

Click the **Courses** link to list any courses mapped to an outcome. You can click the **Sections** link to view any assessments that may be available.

Click the **Select rubric** link to assign a specific rubric to an outcome.

2.6 Reports

2.6.1 Reports

Output, status and exception reports are provided. Output reports are typically available in Excel® and/or PDF format.

Click the **View** link to generate a report. If available, select a filter to determine the level of data to be included.

2.7 Rubrics

2.7.1 Rubric Library

You can create a library of rubrics and associated information. Create **Folders** to organize and categorize rubrics.

To **add** a rubric to the library, you must first create the rubric as an MS Excel® spreadsheet file.

The Excel file must have a .xls file type. A .xlsx file type will be rejected. If you are using Excel version 2007 or later, use the Save As function as select type Excel 97-2003 Workbook.

To Create a Rubric using MS Excel®

1. Add the text you want to appear as **Levels** in cells A2, A3, A4 and so on. Optionally include a weight in square brackets [ ] at the end of the text. If no weight is included, a value of 1 is assumed.
2. Add the text you want to appear as **Criteria** in cells B1, C1, D1 and so on. Optionally include a weight in square brackets [ ] at the end of the text. If no weight is included, a value of 1 is assumed.
3. Add the text you want to appear as the rubric in the appropriate cells, e.g. B2, C2 and so on.
4. **Save** the file, e.g. myRubric.xls, to a folder on your workstation.

Example

	A	B	C	D	E
1	Core Objective Aspects	Exceeds Expectations [4]	Meets Expectations [3]	Below Expectations [2]	Unacceptable [1]
2	Context and purpose	Exceptionally effective content for purpose, occasion, audience, and assignment; exceptional audience adaptation	Adequate content, appropriate and effective for purpose, occasion, audience, and assignment; some audience adaptation evident	Content was inappropriate for the purpose, occasion, audience, and assignment; minimal adaptation to the audience	Failed to meet assignment purpose; no adaptation for occasion/audience (language, knowledge, experience, culture)
3	Organization	Exceptionally clear organizational pattern; easily followed	Mostly organized and logical organization; logical progression of ideas; some unity of thought	Organization is lacking, information is rambling; does not follow assignment structure; lack of unity in thought	No evident structure; repetitive ideas; impossible to follow
4	Central message	Exceptional use of information/details/ research/examples that support the central idea and main points	Some clarifying information/details/research/examples which support the central idea and main points	Lacks information/ details/research/ examples to support central ideas and main points	No details provided; information/details/ research/examples fail to support the central idea and main points
5	Written, visual, and/or oral communication skills	Information is conveyed in a clear, appropriate, logical, and easy-to-follow manner. Correct diction, grammar, and format are used throughout	Information is conveyed in a clear, appropriate manner. Diction, grammar, and format are mostly correct	Information is conveyed in a manner that is somewhat unclear and difficult to follow. Diction, grammar, and format are often incorrect and/or inconsistent	Information is conveyed in an unclear, inappropriate manner that is difficult to follow. Diction, grammar, and format are overall incorrect
6	Quality of sources	Appropriate, credible sources of information are used. Sources are correctly cited	Appropriate sources of information are used. Sources are correctly cited	Most informational sources are not appropriate or reliable. Sources are partially or incorrectly cited	Informational sources may not have been used or may be inappropriate. Sources are incorrectly cited or not cited at all
7					

To Add a Rubric to the Library

1. Click the **Rubric** button
2. Browse for a rubric (.xls) file
3. Enter a Title and optional **Description**
4. Click **Submit**

Once a rubric has been added to the library, you can use the **Modify** link to change the content, including weights, if required.

2.8 Control Panel

2.8.1 LMS

You can define the parameters for linking to your Learning Management System (LMS)* in order to retrieve gradebook columns and student scores via the Xitracs Portal.

Select the LMS provider and complete the information required. This will require you co-ordinate with your institution's LMS administrator.

** Gradebook column linking is an optional feature and is currently available for Blackboard®. Check with your Xitracs representative for additional LMS availability.*

2.8.2 Manage Outcomes

Outcomes, other than those defined specifically for a program or course, can be created. These outcomes may be **General** (institution internal) or **External** (e.g. agency defined).

General and external outcomes are managed in **Outcome Sets**, which in turn are managed in **Outcome Groups**.
A general or external outcome can be linked to a course and/or field in a program assessment field set. A general outcome can also be included in a Curriculum Map.

You can create one or more **Outcome Sets** for a selected group. For example, under an external outcome group you might create two sets, "ABET Engineering 2015" and "ABET Computer 2015", within the "ABET" group.

Click the **Outcomes** link to add or edit the appropriate outcomes to each set.

2.8.3 Manage Students

The Control Panel function provides an option to add students by manual entry or file import.

To Add a Student Manually

1. Click the **Add** new student
2. Enter a **Last name** and **First name** - these fields are required
3. Add an optional **Middle name** or initial(s)
4. Enter an **Email** address - this field is required
5. Enter a **Student ID** - this field is optional
6. Enter a **Password** - this field is optional

***Note**: A password typically is not required, except for testing purposes. Student authentication is normally handled through an LTI or SSO function.*

To Add or Remove Students by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Student

1. Click the **Find** link
2. **Search** for a student or click **List all**
3. Click the **Edit** link for the relevant student
4. Update the **Fields** as appropriate
5. Click **Submit**

To Change a Student Password

1. Click the **Find** link
2. **Search** for a student or click **List all**
3. Click the **Password** link for the relevant student
4. Update the Password as appropriate
5. Click **Submit**

2.8.4 Portal

The task requests from a general assessment workflow will be emailed to the respective faculty and scorers. You can set the email to originate either from the user that generated the workflow or from a specific email address.

Check with your IT department to make sure the email address will not be blocked by the institution's spam filter.

2.8.5 Reports

The header, footer and title page of the PDF assessment report can be customized. Click the **Settings** link to add or edit this information.

3 Xitracs Credentials™

3.1 Overview

The **Xitracs Credentials™** module allows information to be captured and managed for:

- **Faculty and Staff members** - Qualifications, Curriculum Vitae (CV), Courses taught, Documents
- **Courses** - Course Sections (instances), Semesters, Instructors (faculty), Syllabi

The information can be categorized by **School** and by **Department** within a school and also by **Campus** (if the campus feature is installed).

Various management and agency **Reports** can be generated, for example the mapping of faculty qualifications to courses taught. In addition, a **dynamic website** view of credentials information can be made available for external reviewers.

Information regarding the import format of credentials information is available in a separate publication: Xitracs Data Import Guide.

When the Credentials module is first set up, information must be added to the system in the correct sequence of steps. See the Control Panel function or Import Guide for more information.

Faculty and course information may be added via import or manual entry and consist of the following main elements:

Faculty information

1. Base Data
2. Qualifications
3. Course mapping

Course information

1. Course catalog
2. Course sections by semester

Course Sections are the actual instances of a course; a course may have multiple sections across multiple semesters.

The course catalog may be published if the optional Catalog Publisher Add-On™ is installed.

Documents

Faculty and staff documents are added manually via the Documents tab.

If tab in the Xitracs Portal is enabled, certain documents such as a CV can be added by a faculty or staff member using the Feedback function.

If the optional Xitracs File-Q™ is feature installed, documents can be profiled and added to a faculty or staff record by viewing a queued item.

3.2 Faculty & Staff

3.2.1 Faculty Details

Information for each faculty or staff member may be viewed and edited via the **Faculty & Staff** tab.

To Find a Faculty or Staff Member

1. Enter data into the **Search Box**.
2. Check the **Last Name** *(default)*, **First Name, ID** or **Email** radio button.
3. Click the **Search** button or hit the **Enter** key.
4. Select a **Filter** if required.
5. Alternatively, click the **List by department, School** or **List all** link.

Click on the Details link for a faculty or staff member in the list and the information will be displayed in the right panel.
The availability of certain tabs and functions is dependent on agency templates and modules licensed.

3.2.2 Base Data

The availability and content of many of the fields may be changed via the Control Panel > Faculty & Staff > Settings .

1. Using the function links **Edit** the fields as appropriate.
2. Select the **Highest Degree Earned** from the drop-down. The options available are set via the Control Panel > Qualification types function.
3. To add a CV document, use the **Upload** link (to add from a local resource), **Library** link to add from the library or **Replace** link if a CV already exists.

If Extended Data fields have been defined, these will also appear under the Base Data tab.

***Note**: The member Name, Department and School are not editable in this view. This is a Control Panel function.*

You can add Tasks with a priority setting as a notation or reminder. These are internal only and are never published.
Optionally, you can set the status of the information for a faculty member by clicking the Information status link to the right of the tabs.
Management reports are available for both these functions in the Reports section.

3.2.3 Qualifications

The qualifications for a faculty or staff member may be added or edited.

Use the **Add new**, **Edit** and **Delete** function links as appropriate.

1. For **Degree Awards** you can add the year and indicate if a transcript is on file. Select the award from the drop-down and add additional detail. Click the **Add Credits** link to optionally enter credit information for the qualification.

Note: The awards available fro selection in the drop-down are managed via the Control Panel > Faculty Settings > Qualifications

2. For **Licensures** a license validity start and end date can be added. To exclude a start date, check the

box.

If the CIP Code module is licensed, you will be able to assign one or more CIP codes to a qualification. This data may also be imported.

3.2.4 Courses

If the faculty member is enrolled in any course sections, these will be listed in order of most recent semester.

***Note**: Course section enrollments are added or removed via the Control Panel > Course Catalog*

1. To add a **Course Section Syllabus**, click the icon and upload a new or replacement syllabus document. The syllabus availability icon will change from (no syllabus) to (syllabus available).
   Note: To Remove a syllabus from a course section go to the Departments tab, find the relevant course section and click on Details > Remove.
2. Optionally select whether the qualification is **Compliant**.
3. Click the **Add** link to select an appropriate **qualification** from the list in the drop-down. *The selections available are from the Qualifications tab (see above).*
4. Optionally indicate whether this is an **additional qualification** by checking the box in the drop-down.
   Note: Qualifications that are flagged as Additional are shown separately in certain roster reports (e.g. SACS)
5. Add a **Comment or Justification** if appropriate.
6. **Edit** or **Remove** a qualification by clicking on the relevant link.

3.2.5 Eligibility

If the Course Eligibility feature is enabled in the Control Panel, this tab will list courses that the selected faculty member is eligible to teach.
Eligible courses are managed in the Course Catalog.

If a faculty member is teaching a course for which he/she has not been listed as eligible, an alert flag will appear next to the relevant section under the Courses tab. This alert message is not included in the published roster report.

Faculty eligible for teaching a specific course can be found by using the Reports > Course eligibility report.

3.2.6 AACSB

This Tab and function is only available if the AACSB agency template is licensed.

1. **Add** or **Edit** the AACSB Details as appropriate.
2. Select **AQ**, **PQ** or both to enable/disable the relevant Details panel.
3. Select the **Highest Degree Earned** from the drop-down. *The selections available are from the Qualifications tab (see above).*

This information can be output to an Excel spreadsheet. See Reports.

3.2.7 Activities

This Tab and function is only available if the AACSB agency template is licensed.

1. Select a **Semester**.
2. Click the **Edit** link at the top right of the relevant panel
3. Add or **Edit** the **Activities** as appropriate. Data may be added directly or by using the spin control functions.

This information can be output to an Excel spreadsheet. See Reports.

3.2.8 Documents

You can add documents for a faculty or staff member. These can be General items or in support of Credentials.

Note: Faculty documents are viewable by external reviewers only if enabled using the Administration > System Extensions > Reviewers function.

1. Add a document by clicking the **Add file** link next to the relevant area.
2. **Browse** for the file.
3. Add a **Title** and select the **Document Type**. *To manage the types see Control Panel > Faculty Settings > Documents.*
4. Click **Submit**.
5. After uploading you can **View**, **Edit**, **Replace** or **Delete** a document by clicking the relevant link next to the item.

If the Xitracs File-Q™ feature is installed, documents may also be added via a File-Q channel.

3.2.9 Feedback

If the Xitracs Portal™ is installed, certain information added by a portal user will be available to department administrative personnel via the **Feedback** tab.
This portal option lets a faculty or staff member comment on base data, qualifications and add certain documents, such as a CV or course syllabus. After review, administrative personnel can update the respective member's credentials information as appropriate.

Note: Faculty members cannot edit credentials information directly via the portal.

If pending faculty input is present, the Feedback tab will appear. Click on the tab to list the input.
A Source field (e.g. Base data) will be shown, together with the date and time the feedback was created.
If a file is included, it will be shown under the feedback detail.
Click the **View** link to open the file; click the **Copy** link to add the file to the appropriate area, such as a qualification or course.

Use the **Respond** link to generate an email to the portal user via your email application, e.g. Outlook.

When you have finished processing a feedback item, check the box in the list and click the **Delete** button to remove it from the pending list.

See also Reports > Feedback to list faculty members with pending feedback.

3.3 Schools & Departments

3.3.1 Schools

The **Schools** tab allows a user to filter faculty members and courses by school and department and add or edit certain information.

A list of available departments is presented. See the Departments function for additional information.

If the **Campus** function is enabled, this information will also be displayed.

3.3.2 Departments

The **Departments** tab allows a user to filter faculty members and courses by department and add or edit certain information.

A list of available departments is presented.

To View Courses and Course Sections for a Department

1. Click on the **Courses** link for a department to view a list of courses
2. Click on the **Sections** link (if available)
3. Click on the **Details** link
4. Add or replace a **Syllabus** as appropriate

To View Faculty Members for a Department

1. Click on the **Faculty & Staff** link for a department link to view a list of faculty members
2. Use the **Edit** link to update a faculty member as appropriate, or Add new
3. See Manage Faculty& Staff for more information

3.3.3 Courses

A list of a courses can be accessed using the **Departments** tab.

To View Courses and Course Sections for a Department

1. Click on the **Courses** link for a department to view a list of courses
2. Click on the **Details** link
3. Click on the **Sections** link to list any available course sections
4. Click on the **Faculty** link to view faculty eligible to teach the course
5. Add or replace a **Syllabus** as appropriate

3.4 CIP Codes

3.4.1 CIP Codes

This feature is only available if the CIP Code Module is installed.

Classification of Instructional Programs (CIP) Codes can be mapped to both courses and faculty qualifications. This is a Control Panel function.
The CIP Code tab will list the codes loaded into the system and let you drill down and find any faculty or courses that are linked.

A search function is available to find codes by Titles, Definitions and Examples.

3.5 Reports

3.5.1 Reports

General Reports

1. Credentials Online

This report generates a website which contains dynamic information in a view-only mode. A viewer can look at faculty credentials and course information.

If the viewer is external (i.e. not a user logged on to the Xitracs system), access is controlled via the Administration > System Extensions > Reviewers function.

2. Faculty Report

A static report in PDF format is generated. The report can be filtered by School, Department and Semester.

Agency Reports

Certain accrediting agencies define specific faculty reports, e.g. SACS Faculty Roster.

The availability of these reports is determined by the Agency Templates that are installed.

Management Reports

A suite of management reports is provided, including **Missing CVs and Syllabi**, **Expired Licenses**, **Open Tasks** and **Pending Feedback**.

Statistics Reports

These reports provide faculty counts by department and location (if the faculty member location has been specified).

CIP Reports *(if CIP Code module is installed)*

These reports provide usage and exception information by CIP code.

Note: For systems with the Campus module installed, if the user running the reports is not assigned to a specific campus a drop-down will be available to select the campus to which the report applies.

3.6 File-Q™

3.6.1 File-Q™ Channels

The Xitracs File-Q™ feature is a productivity tool that makes it easy to catalog and add existing documents to the Credentials module. Documents may be added to a channel directly using a **Drag/ Drop** function. Optionally, one or more channels can connect to the Xitracs system is via a MS Windows® application which can be installed on one or more workstations. Documents in the local directory of each workstation are automatically synchronized with the Queued Documents list on the Xitracs system. Note that the Workstation application is a separately licensed option.

If the feature is installed, the File-Q™ tab will be available. See also Administration > Manage Users to determine who has access to this module.
Queued documents can be added to faculty credentials, courses or course sections.

Click on the tab to list any workstations connected to the Xitracs system. If there are any queued documents pending, the number will be shown together with a View link. Click the link to open the list of documents.

The list of any queued documents will appear in the left side panel. Click the Refresh icon to update the list at any time.

To Profile a Queued Document

1. Click the **View** link next to the item at the top of the list to display the file in the right panel.
2. Select the **Faculty**, **Course** or **Section** tab as appropriate.

   If Faculty

   i. Start to enter a name and then click on the relevant faculty member in the list displayed.
   ii. Select the document Type.
   iii. Select the area to Add the document, e.g. General documents, CV or a specific credential.
   iv. Click the Add button.

   If Course

   i. Start to enter a course code and then click on the relevant course in the list displayed.
   ii. Select the document type, e.g. Syllabus.
   iii. Click the Add button.

   If Course Section

   i. Start to enter a course code, select a course section then click on the relevant section in the list displayed.
   ii. Select the document type, e.g. Syllabus.
   iii. Click the Add button.
3. When finished with the scanned item, click the **Summary** tab.
4. Click **Complete** to finish processing the file and removed it from the queued documents list.

Note: A queued document will not be added to the selected document area until the Complete button has been clicked.

3.7 Control Panel

3.7.1 Initial Setup

Before using Credentials module for the first time, it is important that these steps are followed in the sequence shown below.

Most of this data can also be imported. See the separate publication *Xitracs Data Import Guide.*

1. If the optional Campus Module is installed, add the campuses. See Administration > System Extensions > Campuses.
2. Add Schools. See Control Panel > Manage Schools for more information.
3. Add Departments - for each School add one or more departments. See Control Panel > Manage Departments for more information.
4. Add Qualifications, both types and awards. See Control Panel > Faculty Members > Settings > Qualifications for more information.
5. Add Faculty Members. The Department to which a faculty member belongs must be specified. See Manage Faculty Members for more information.

   A faculty member may belong to one department only.

6. Add Faculty Credentials. If this data is not imported, see the Faculty tab > Qualifications for manual entry.
4. Add Semesters. See Manage Semesters for more information.
5. Add Courses. See Course Catalog for more information.
6. Add Course Sections. See Course Catalog for more information.

   Course sections (i.e. instances of courses taught) are globally unique. Therefore a section code may be used once only.

7. Add Faculty Enrollments. *These are the course sections being taught by each faculty member.*
8. Add Faculty Course Section Credentials. *These are the faculty qualifications that apply to course sections taught.*

3.7.2 Course Catalog

The Course Catalog is used by the Credentials module to map faculty qualifications to courses taught by semester. The information contained in the catalog can be imported easily by using text files. See the separate publication **Xitracs Data Import Guide** for information on how to prepare these files. The course catalog consists of two parts:

Courses - these are the "parent" course catalog entries

Course Sections - these are the actual instances of courses delivered

A Course must be linked to a Department and must have at least one Course Section. A Course Section must in turn linked to a Semester and one or more Faculty Members.

To Add a Course Manually

1. Click the **Courses** link
2. Click the **Create a new course** link
3. Enter the **Course Code**, **Title** and short **Description** (these field are required)
4. Select a **Department** from the drop-down
5. Enter data for other **optional fields** (e.g. Level, Hours, Credit) if appropriate
6. Click **Submit**

***Note**: If no department is available in the drop-down, there are no departments in the system - see Manage Departments.*

To Add or Remove Courses by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Courses** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Course

1. Click the **Courses** link
2. Click the **Edit** link for the relevant course
3. Update the **Title** and **Description** or other fields as appropriate
4. Click **Submit**

To Add a Course Section Manually

1. Click the **Courses** link
2. **Search** for a course or click **List all courses**
3. Click the **Sections** link for the relevant course
4. Click the **Create a section** link
5. Enter a **Code** and **Title**
6. Select a **Semester**
7. Click **Submit**

***Note**: If no semester is available in the drop-down, there are no semesters in the system - see Manage Semesters*

To Add or Remove an Eligible Faculty Member to a Course Manually

1. Click the **Courses** link
2. **Search** for a course or click **List all courses**
3. Click the **Eligibility** link for the relevant course
4. Click the **Add a Faculty Member** link or select an existing faculty member to remove

***Note**: The Eligibility option must be enabled for this function to be available - see Control Panel > Manage Faculty Settings*

To Add or Remove Eligible Faculty Members by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Courses** link
2. Select the **Add** or **Remove** eligible faculty radio button
3. **Browse** for the relevant import file
4. Select the data **Separator**
5. Click **Submit**

To Add or Remove Course Sections by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

6. Click the **Import Course Sections** link
7. **Browse** for the relevant import file
8. Select the data **Separator**
9. Click **Submit**

To Edit a Course Section

1. Click the **Courses** link
2. **Search** for a course or click **List all courses**
3. Click the **Sections** link for the relevant course
4. Click the **Edit** link for the relevant course section
5. Update the **Section Code**, **Section Title** and **Semester** as appropriate
6. Click **Submit**

To Add Faculty to a Course Section

1. Click the **Faculty** link
2. Click the **Add a faculty member** link
3. **Search** for the relevant faculty member
4. **Check** the box next the listed faculty member(s)
5. Click **Submit**

To Remove Faculty from a Course Section

1. Click the **Faculty** link

2. **Check** the box next to the relevant faculty members
3. Click **Remove**

To Add or Remove Faculty Enrollments by File Import

See the publication "Xitracs Credentials Import Guide" for details on the process and file content.

Field & Labels

The course catalog fields can be managed. This includes controlling visibility and editing labels for default and custom fields.

1. Click the **Field & Labels** link
2. Optionally **edit** the default label
3. Optionally **select** if the filed is to be visible (i.e. displayed in the course catalog)
4. Click **Submit**

Status

The course status can be managed. This includes editing labels for default fields and adding custom statuses.

3.7.3 Course Outcomes

Outcomes for each course can be defined. The outcomes are used in the Programs module (if installed) for outcomes assessment and outcomes mapping.

Course outcomes can be added manually or imported. See the **Xitracs Data Import Guide**.

To Add a Course Outcome

1. Click the **Outcomes** link for the relevant course
2. Click Create an Outcome
3. Enter a short **Label** for the outcome and a description
4. Click **Submit**

Use the **Edit** and **Delete** link to update or remove an outcome.

3.7.4 CIP Codes

If the optional Classification of Instructional Programs (CIP) Code Module is licensed, the Xitracs system will enable you to assign one or more CIP codes to both courses and faculty credentials.
Codes may be added and managed on a National, State and Local level depending on institution usage.

For information on how to import CIP codes, see the separate publication: Xitracs Data Import Guide.

In the Control panel, you can use the View link to see the hierarchy of codes.

To assign one or more codes to a specific course, see Course Catalog > Manage courses > CIP Codes. This data may also be imported.

Note: CIP codes are assigned to parent courses, not to course sections. A section will automatically inherit the code(s) from the parent.

To assign one or more codes to a specific faculty qualification, see Faculty > Qualifications > CIP. This data may also be imported.

3.7.5 File-Q™ Workflow Channels

Users with Control Panel access can create channels for adding documents using the drag/drop function. Creating additional channels allows you to separate documents into different queues, for example transcripts in one channel and course syllabi into another.
Note that in order to have access to a File-Q channel for either uploading or profiling documents, a user must have the necessary privilege enabled. See Administration > Manage users.

3.7.6 Manage Departments

Departments are a subset of a school, therefore at least one school must exist in order to create a department.

Department **Names** must be unique. For example, there cannot be more than one "Finance Department". However, "Finance Department" and "International Finance Department" is acceptable.

If the Campus extension is installed, department names must be unique within a campus. For example, both Campus A and Campus B may have a department named "Finance Department".

To Add a Department Manually

1. Click the **Departments** link
2. Click the **Create a department** link
3. Select a **School** with which the department is to be associated
4. Enter the **Name** and short **Description** for the department
5. Click **Submit**

To Add or Remove Departments by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Departments** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Department

1. Click the **Departments** link

Alternatively you can locate a department within the **Schools** listing

2. Click the **Schools** link
3. Click the **Departments** link for the relevant school
4. Click the **Edit** link for the relevant department
5. Update the **School** as appropriate
6. Update the **Name** and **Description** as appropriate
7. Click **Submit**

3.7.7 Manage Disciplines

A list of academic disciplines can be created manually or imported. A discipline may be linked to a faculty member and/or to a program if the Programs module is installed. Each discipline must belong to a **Classification**.

To Create a Classification

1. Go to Control Panel > Schools & Departments > **Disciplines**
2. Click the **Create** link
3. Add a **Name** and optional **Description**
4. Click **Submit**

Use the **Edit** link to amend the name and/or description of an existing classification.

To Create a Discipline

Use the **Discipline** link next to the relevant classification to add a new discipline or edit an existing discipline.

Disciplines may also be imported. Refer to the **Xitracs Data Import Guide**.

3.7.8 Manage Schools

Schools are the highest level of organization within an institution. For example: School of Business, School of Medicine.
There must be at least one school defined in the system.

School **Names** must be unique. For example, there cannot be more than one "School of Business". However, "School of Business" and "Graduate School of Business" is acceptable.

If the Campus extension is installed, school names must be unique within a campus. For example, both Campus A and Campus B may have a school named "School of Business".

***Note**: The term "School" is used generically. An actual school may be named to fit the institution's terminology, e.g. "College of Business"*

In the system hierarchy, Schools have Departments. Departments have Faculty Members and Courses.

To Add a School Manually

1. Click the **Schools** link
2. Click the **Create a school** link
3. Enter the **Name** and short **Description** for the school
4. Select a **Campus** (only available if the campus extension is installed).
5. Click **Submit**

To Add or Remove Schools by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Schools** link
2. **Browse** for the relevant import file
3. Select the data **Separator**

4. Click **Submit**

To Edit a School

1. Click the **Schools** link
2. Click the **Edit** link for the relevant school
3. Update the **Name** and **Description** as appropriate
4. Update the **Campus** or set to blank to remove the association (only available if the campus extension is installed).
5. Click **Submit**

3.7.9 Manage Semesters

Semesters are used in conjunction with Course Sections to establish the periods during which courses are delivered. This information is used to filter certain reports by semester or date range.

To Create a Semester

1. Click the **Semesters** link
2. Click the **Create a semester** link
3. Enter a **Name** for the semester, e.g. Spring 2014
4. Enter the **Start** and **End** dates for the semester
5. Click **Submit**

To Edit or Delete a Semester

1. Click the **Semesters** link
2. Click **Edit** or **Delete** next to the relevant semester
3. Edit the semester **Name** and/or **Dates** if appropriate
4. Click **Submit**

3.7.10 Manage Faculty & Staff Members

The Control Panel function provides an option to add faculty members by manual entry or file import. This is also the means by which users are added and managed for the Xitracs Portal.

To Add a Faculty & Staff Member Manually

1. Click the **Add** new faculty member link
2. Enter a **Title** (e.g. Professor, Doctor) - this field is optional
3. Enter a **Last name** and **First name** - these fields are required
4. Enter an **Email** address - this field is required
5. Select a **Department**
6. Select a **Location** - this field is optional. See Settings > Locations
7. Select a **Status** (and associated date if applicable) this field is optional. See Settings > Status
8. Select a **Discipline** - this field is optional. See Disciplines
9. Enter a **UserId** and/or **Network Name** if used by your institutions - these fields are optional
10. Select a **Type** - this field is optional. See Settings > Types
11. Select a **Supervisor** - this field is optional. The user selected will be able to view the credentials information for this faculty or staff member. *Note: The selected user must be another faculty or staff member.*

***Note**: If no department is available in the drop-down, there are no departments in the system - see Manage Departments*

To Add or Remove Faculty & Staff Members by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import** link
2. **Browse** for the relevant import file
3. Select the data **Separator**

4. Click **Submit**

To Edit a Faculty & Staff Member

1. Click the **Find** link
2. **Search** for a faculty member or click **List all**
3. Click the **Edit** link for the relevant faculty member
4. Update the **Fields** as appropriate
5. Click **Submit**

To Change a Faculty & Staff Member Password

1. Click the **Find** link
2. **Search** for a faculty member or click **List all**
3. Click the **Password** link for the relevant faculty member
4. Update the Password as appropriate
5. Click **Submit**

3.7.11 Manage Faculty & Staff Settings

The options available in the Edit Faculty view can be managed through the Faculty **Settings** function.

Base Data

1. Click the **Field Settings** link to control which fields are visible on the Base Data tab
2. Check the box next to the base data fields that are to appear. (These cannot be edited).
3. Click on each of the other fields (e.g. Faculty Rank) to edit or add values to the drop-down selection.

For certain base data fields (e.g. faculty Rank), the drop-down values can be edited.

Qualifications

1. Click the **Qualifications - Awards** or **Qualification - Award Types** links to add or edit these fields.

See qualifications for more details about this function.

2. Click the **Settings** link to control the requirement for certain fields.
3. Check the **Eligibility** option to allow you to manage and report on faculty members who are eligible to teach certain courses. See the Course Catalog for information on how add eligibility information.

Document Types

1. Click the **Documents** link to edit or add values to the drop-down selection.

You can use the document types to control which items are available to external reviewers. See Administration > System Extensions > Reviewers

See also Faculty > Documents tab

Extended Data

1. Additional fields can be added to the Base Data tab.
2. Specify the relevant field type. If the field type is **Selection**, use the Parameters link to define the available drop-down selections.

Faculty Status

3. Click the **Faculty status** link to edit or add values to the drop-down selection (e.g. Resigned, Retired).

Locations

1. Click the **Location** link to edit or add values to the drop-down selection.

If you try to delete a drop-down value while it is in use, you will receive a warning message.

3.7.12 Qualifications

Qualifications can be added to the Credentials system and subsequently selected when editing a faculty member.

Qualifications - Award Types

Each qualification award must belong to a **Type**. The system includes 4 default types: Associate, Bachelors, Masters & Doctorate

The default types may be edited and additional types added. These types will be available for selection in the **Highest Degree Earned** field when editing a faculty member.

Create a Qualification Type

1. Click the **Types** link
2. Click the **Create** link
3. Enter a **Name** for the type
4. Click **Submit**

An existing type may be **Edited** or **Deleted** by clicking the appropriate function link.

Deleting a type will cause any associated qualifications to be without a type. After deletion, check to see if there are any "orphaned" qualifications and associate them with another type.

Qualifications - Awards

The system includes 4 default qualification awards which are linked to the default types and have the same names: Associate, Bachelors, Masters & Doctorate

The default qualifications may be edited and additional ones added. These qualifications will be available for selection in the **Qualifications** field when editing a faculty member.

You may add as many more qualifications as you need, depending on the level of granularity you require. For example:

- Bachelor of Arts
- Bachelor of Arts - Music
- Master of Business

Create a Qualification

1. Click the **Qualifications** link
2. Click the **Create** link
3. Select a **Type**
4. Enter a **Name** for the qualification
5. Click **Submit**

An existing qualification may be **Edited** or **Deleted** by clicking the appropriate function link.

Deleting a qualification will cause any associated faculty links to be lost. After deletion, check to see if there are any "orphaned" faculty and associate them with another qualification.

Qualifications - Other

You can edit the drop-down selections available for Other Qualifications & Experiences.

Qualifications - Settings

You can control whether the system will force entry of an Institution and Year for each qualification award.

Check the box to enable Course eligibility tracking if required.

Qualifications and Qualification Types may also be imported if preferred. See the Xitracs Credentials Import Guide for more information.

3.7.13 Reports

Static data (title page, header and footer) contained in the Credentials PDF Report and certain Agency Credentials Reports (e.g. SACS Roster) can be set.

1. **Enter** data in the available fields
2. Click **Submit**

For more details on available credentials reports, see the main Reports section.

3.7.14 Automap Credentials

In the Xitracs system, faculty credentials are linked to course sections. This lets you generate reports which show the relevant qualification(s) for a course being taught *in a specific semester*.
This is important when there is an external reporting requirement to show the specific qualifications held by an individual faculty member *at the time a course was being taught*.
Mapping of course credentials to specific sections may be done manually via the courses tab for each faculty member or, more typically, via data import. (See the separate publication Xitracs Data Import Guide).

For those institutions which do not have a need to track specific credentials for each course section, the **Automap** function will automatically map a faculty member's credentials to the course sections being taught in a selected semester.
This eliminates the need to import the course credential mapping data. Once an initial semester has been updated using Automap, subsequent semesters can then be updated using the Synchronize function.

To Initiate Automap

1. Select the **Semester** in which course sections will be updated.
2. Select the **Department(s)** for which course sections will be updated.
3. Select the Qualification types to map and whether each type should be included as a main or additional qualification.

   Note: Qualifications that are flagged as Additional are shown separately in certain roster reports (e.g. SACS)
4. Click **Submit**
5. After automapping a report will be generated.

3.7.15 Synchronize Credentials

The Synchronize Credentials function allows a you to carry forward existing mapped qualifications to course sections in a subsequent semester, without having to import a new credentials mapping file or update a faculty member manually.
For example, if faculty qualifications have already been mapped for course sections in the Fall Semester, they can be carried forward to sections *of the same course* in the following Spring semester automatically.

Course sections in the selected semester with no mapped faculty qualifications will be updated as follows:

From another section of the same course in the selected semester that already contains mapped qualifications

***OR**, if no other section of the same course in the selected semester exists:*

From the most recent prior semester that contains a section of the same course with mapped qualifications.

***Note**: You cannot synchronize retroactively; i.e. update earlier course sections from a later semester.*

To Initiate Synchronization

1. Select the **Semester** in which course sections will be updated.
2. Select the **Department(s)** for which course sections will be updated.
3. Click **Submit**
4. After synchronization a report will be generated.

4 Xitracs Planning™

4.1 Overview

The **Xitracs Planning™** module allows you to create plans, gather input from a number of sources, track progress and publish in a website or PDF format.

Depending on your Xitracs system configuration, you can create two types of plan: **Free-form** or **Goal-based**. Free-form plans can be built with a more flexible structure in terms of headings and editable rows, whereas Goal-based plans only have headings under which goals can be added. The advantage of a goal-based plan is that it lets portal users create and link goals. The goals themselves can then be tracked over time.

In systems where goal-based planning is not enabled, all existing and new plans are designated as Free-form.

Plans are managed in cycles and associated timeframes. For example, a strategic plan cycle may be on a 3 year timeframe, whereas an operational plan cycle may be on 1 year timeframe. Plans may also be linked for reporting purposes, such that a row in Plan A might be linked to another row in Plan B.

Plan input is managed through Fields. The fields are defined by the plan builder and are consistent for all rows in the same plan, but may differ from plan to plan. Fields may be completed though either (1) the assignment of a plan row to a team or (2) the assignment of a plan row to one or more portal users. Plan rows may optionally be linked to a Survey or to individual survey questions. This is a useful tool for gathering input.

Click on the **Plans** tab to go to a list of plans available to you. The availability is determined by your membership of one or more teams.
If your plan list is empty or a particular plan is not listed, it is typically due to either: (1) you are not a member of any team or (2) you are a member of a team, but the team has not been assigned to any rows in the plan or (3) the plan has been set to **Offline**.
See the Teams function for further information about how to assign team members and Properties about how to set the status of a plan.

Plans can be organized by group and associated with a department via the Control Panel > Manage Plans function.
To switch views, click on the relevant link or click list to view all available plans. A user must belong to a plan's team for the plan to be available. A user's plan list will look similar to the following:

Switch to Group or Department view

Title	Description	Type	Cycle	Timeframe	Status	Function
Division Plan	Division Plan example	Free-form	2	2015-2016	Online	Edit Preview Publish Teams
Institution Strategic Plan	Institution-wide strategic plan	Free-form	1	2013-2016	Online	Edit Preview Publish Teams
Strategic Goals	Strategic Goals for the department	Goal-based	1	2015-2016	Online	Edit Preview Publish Teams
Strategic Objectives	2013-2016 Strategic Objectives	Free-form	1	2013-2016	Online	Edit Preview Publish Teams

If a user's plan is not associated with a group or department, it will only be visible in the **list** view.

The **Title** and **Description** identify the plan

The **Type** column identifies the plan as Free-form or Goal-based. (see above).

The **Cycle** contains the number of the cycle that the plan is currently in. Plan cycles are set via Control Panel > Manage Plans > [Plan] >Properties.

For additional information see Manage Plans > Plan Cycles

The **Timeframe** contains the name of the timeframe that is associated with the cycle. Timeframes are set via Control Panel > Manage Plans > [Plan] >Properties. For additional information see Control Panel > Timeframes

The **Status** indicates the current state of the plan. This is set via Control Panel > Manage Plans > [Plan] > Properties.

- Online - the plan is available for editing by assigned team members.
- Locked - the plan can be viewed by assigned team members but cannot be edited.

The **Function** column contains a number of links which will take the user to an operation in the Xitracs system. Availability of these links is determined by the type of team that you belong to for a specific plan. See the next section to understand how these functions work.

4.2 Plans

4.2.1 Editing a Plan

In the **Edit** mode, the Plan is available to system level team members to view, add to or edit information for assigned rows.

The first example if of rows in a **Free-form plan**. Portal users are assigned by clicking on the portal icon.

Row		Information			Links				Progress		
		Log	Budget	Fields	Portal	Surveys	In	Out	Start	Due	Status
GOAL **Facilities**	Learning Center *Add a new campus student learning center.*		$1,157,000				7	2	09/10/11	04/10/12	Draft
GOAL **Retention**	Students *Improve student retention rates by 10 percentage points*		$213,000				3	0			
GOAL **Faculty**	Doctorates *Increase level of faculty with doctoral degrees.*		$935,000				2	0			

In the above example, there are three action rows listed. If a row is grayed out, it is because a team member is not assigned to a row. *See Teams on how to assign teams to a plan row.*

The example below is of a **Goal-based** plan. Portal users can be assigned to header rows by clicking on the portal icon.

Strategic Goals [Goal-based] Add goal Close plan

TOP > ENGINEERING Plan Cycle:1 Timeframe: 2015-2016

Row			Information			Links		Progress		
ENGINEERING			Log	Budget	Fields	In	Out	Start	Due	Status
Civil										
Electrical										
Electro-Mechanical										
Electronics										
Mechanical										
GOAL **Engineering-G001** [Started: 2015-2016] Achieve a graduation rate of greater than 80%.	Delete goal	Edit goal		$75,000		0	1			
GOAL **Engineering-G002** [Started: 2015-2016] Complete the new mechanical engineering test facility	Delete goal	Edit goal		*No budget set*		0	0			

To assign a plan row to a portal user

1. Click on the icon
2. Click the **Add** a portal user link
3. **Start typing** the portal user name into the box, this will initiate the auto search
4. **Select** and click on the required portal user from the search result
5. Click the icon to add the name to the list or use the Enter key; to remove highlight the name(s) in the list and click the icon
6. Click **Submit**

Goals can then be added and updated by assigned portal users. Goals can also be added and updated in this system user view. If a goal is not linked and/or was not started in a prior reporting cycle, it can be **Deleted**.
If a goal was started in a prior cycle, the **Delete goal** function link will be replaced by a **Finish goal** function link. Finishing a goal has the affect of retaining all of the associated information but will not repeat the goal in the next and subsequent reporting cycles.
(This is sometimes referred to as "tombstoning".)

If the plan includes a budget, this field will be enabled and the value entered will appear in the budget column. See Fields below.

If a workflow channel has been assigned to a plan, an additional workflow column will appear and the inbox icon will appear in the header bar. Click on the icon to view any pending workflow items.

4.2.1.1 Log

Each time a user edits a section of a plan, the action is recorded automatically by the system.
The last action is visible by placing the mouse cursor over the icon.

1. Click on the icon to see all actions for the section
2. A comment may be added manually by a user by clicking on the **Post Comment** link

The log is not included as part of the published plan.

4.2.1.2 Fields

Fields are the work area where information is entered into a plan. The fields may be edited by clicking the icon.
If there is no icon present it means that you are not a member of the team that has been assigned to the row.

If a plan includes a **Budget**, the budget field will be available.

To enter information into a specific field click the **Edit** link, which will open the input area. The required input will vary depending on field format. For example, if the field input format is free-form text, the text editor will open. For other fields, the format may be a drop-down selection or a quantitative (e.g. numeric or percentage). Field names and associated formats are defined when the fields are created by the plan builder.

For more information see Using the Text Editor. Note that the editor does not support embedded images or hyperlinks in plan fields.

If a field has been configured to allow supporting files, you will be able to add files from a local resource such as your hard drive by clicking the **Add a file** link.

After editing a field, click the OK button to save. If the field input is complete, check the **Mark as complete** box.

Note: Plan fields are defined in the Control Panel. See Manage Plans > Settings > Fields

4.2.1.3 Links

Linking is a useful feature that lets you create relationships for data gathering or reporting purposes.

For Goal-based plans, you can also set permissions that will allow portal users assigned to a plan row to link to a row in another plan that has not been set as a target. For example, this allows a goal in plan A to link to one or more goals in plan B. See permissions.

There are three ways of linking a plan row:

1. To one or more portal users
2. To a survey or to specific survey questions
3. To one or more rows in another plan

Link to Portal Users

When you link a plan row to one or more portal users, field input can be completed via the Xitracs Portal.

The linked portal users can access the plan row fields via the **Plan** tab in the portal.

You can advise portal users of the assignment via email. See Control Panel > Manage Plans > *[Plan]* > Settings > Portal Settings > Email Users.

1. Click on the icon
2. Click the **Add** a portal user link
3. **Start typing** the portal user name into the box, this will initiate the auto search
4. **Select** and click on the required portal user from the search result
5. Click the icon to add the name to the list or use the Enter key; to remove highlight the name(s) in

the list and click the icon

6. Click **Submit**

Link to Surveys

Surveys or specific questions within a survey may be linked to a plan row using the Control Panel. See Manage Surveys > [*Survey*] > Link to plans.

If a survey is linked, the icon in the plan row will be active; if not the icon will be grayed out.

1. Click on the icon
2. A list of linked surveys and questions will be show.
3. Click the **View** link to show a list of responses or the **Excel** link to download the survey in an MS Excel® file format

Link to Other Plans

You can link a plan row to a row in another plan. The number of **Links In** and **Links Out** are displayed.

*Note: **Links In** are only editable using the Links Out function in the source plan.*

1. **Links In** - You can click on the number if it is more than 0 to view other plans linked to this row.
2. **Links Out** - Click on the number and select a plan and row(s) to create links.

4.2.1.4 Permissions

This function applies to Goal-based plans only.

In goal-based plans, by default, a portal user can link a goal to one or more goals at a higher level in the same plan, for example allowing a Dean to link a goal to a President's goal. A portal user can also link to one or more goals in another plan that has been defined as a target. For example, to link a goal in a department plan to a goal in an institution-wide plan.

You can also set up additional link privileges on an exception basis by using the **Permissions** function. For example, unless Department Plan A has been set as a target, portal users in Department Plan B will not be able to link to goals in Department Plan A. However, there may be a requirement to link only certain goals between the two plans.

You can do this by clicking the **Set permissions** link for a specific plan row. When you click this link you will be able to select from a list of available plans that have not been set as link targets. Select a plan and then select one or more available rows.

4.2.1.5 Dates

A date can be set to indicate when a particular section is to be started or due as a visible aid to team members and is also used in the generation of the Due Date Report.
The Set Date function is only available to users who are members of the Manage Team.

Start Dates

- To set the date, click on the icon, select a date from the pop-up and click Submit.

- To edit an existing date, click on the date, select a new date and click Submit.
- To clear an existing date, click on the date and click Clear.

Due Dates

- To set the date, click on the icon, select a date from the pop-up and click Submit.
- To edit an existing date, click on the date, select a new date and click Submit.
- To clear an existing date, click on the date and click Clear.

Due dates are automatically added to the Calendar for each team member enrolled in the plan.

4.2.1.6 Status

A status is used to indicate progress through the planning process. The absence of a status is indicated by the symbol.

The ability to set a status is controlled by a user's Team Membership *for a specific plan row*, as follows:

The Status column indicates the status of activity for each plan row.

- Users who are members of an **Action Team** can set a status of **Draft** or **For Review**
- Users who are members of a **Review Team** can set a status of **Resubmit** or **Approved**
- Users who are members of a **Manage Team** can set any available status, including **Complete**

To set a status:

1. Click the icon or the existing status link
2. In the pop-up, select an available status
3. Optionally check the box to post a Comment
4. Click Submit

   ***Note**: An inactive link indicates that the user does not have the privilege to edit the status. See team membership.*

To clear a status:

1. Click the Clear button in the status pop-up

   ***Note**: This function is only available to Manage team members*

4.2.2 Preview

The Preview function allows a user to view how plan will look without having to publish it. In the Preview mode, no document files are copied and are available for viewing only.

To Preview a Plan

1. On the Plans page, click the **Preview** link.
2. Select the **Cycle** to be included. *The selection will default to the current plan cycle.*
3. Select the **Format** for the preview.
4. Optionally select specific **Field(s)** to be included. (The default is all fields).
5. Optionally select any **Linked data** to be included.
6. Click **Submit.** Depending on the size of the plan, the preview may take a few moments to generate.

Note: Previews in website format cannot be saved and will reset when the browser window is closed.

4.2.3 Publish

The Publish function will generate a plan in a selected format, which can then be used for one or more of a **Printed Copy**, **Website** or **Electronic Media** such as CD or DVD. When a plan is published, all of the narrative and documents (if selected) are copied as part of the plan file. Therefore, any changes made to the plan using the Edit function will have no affect on a previously published plan.

The Publish function is only available to users with a **Manager** or **Administrator** role.

To see how a plan will look prior to publication, use the Preview function.

To Publish a Plan

1. On the Plans page, click the **Publish** link.
2. Select the **Cycle** to be included. *The selection will default to the current plan cycle.*
3. Select the **Format**
4. Select a **Destination**.
5. If the format is **Website** the submission may be published to a website location (if defined) or downloaded as a compressed (.zip) file.
   Note: Website locations must be predefined. See Control Panel > Manage Plans > [Plan] > Settings > Website > Locations
6. Optionally select any **Linked data** to be included.
7. Click **Submit.** Depending on the size of the plan, the file may take a few moments to generate.

4.2.4 Teams

Users are assigned to a plan through membership of a **Team**.
There are three types of teams: **Action**, **Review** and **Manage**. The team type controls which functions in the Xitracs system are available to users.
There can be multiple Action and Review teams, but there is only one **Manage Team** for the entire plan; users who are members of the Manage Team can edit or update the status of all plan rows.

Functions available ▼	Team type ▶	Action	Review	Manage
• Set Preparation Status *(assigned rows only)*		x	x	x
• Set Start/Due Date *(all rows)*				x
• Edit Fields *(assigned rows only)*		x	x	x
• Post Comments *(assigned rows only)*		x	x	x
• Link to Other Plan Rows *(assigned rows only)*		x	x	x
• Link to Faculty *(assigned rows only)*		x	x	x
• View linked Surveys *(assigned rows only)*		x	x	x
• Manage Teams				x
• Add/Edit Preamble				x
• Preview Published Plan				x
• Publish Plan				x
• View Reports				x
• Access Library		x	x	x
• Post to Discussions		x	x	x

Note: Preparation Status selections will differ depending on team type. See Editing a Plan > Status for more information.

There is one team of each type created automatically when a plan is first created; these are the default teams and they cannot be edited or deleted. Additional Action or Review teams can be created as required, then edited or later deleted as appropriate. Creating additional teams is optional, however, it provides a greater level of granularity in assigning users to plans. For example, the preparation and review certain rows in a plan may relate to a specific department, say the English Department. By creating separate Action and Review teams, the relevant rows can be assigned only to the members of those teams, (see *Manage Team Access* below). Users who are members of other Action or Review teams will not be able to edit these rows or update the statuses.

A user must belong to an assigned team in order to have access to a plan.
If a user belongs to a team that has not been assigned to one or more rows, the plan will not appear in the user's plans list.

To Create a New Team

1. Click the **Create** a new team link
2. Enter a team **Name**
3. Enter a team **Description**
4. Select the team **Type**, either **Action** or **Review**
5. Click **Submit**

To Add Team Members

1. Click the **Members** link
2. Click the **Add** member link
3. Enter a **User ID**, **Last Name** or **First Name** to find the user (partial entry allowed)
4. Click **Submit**
5. Matched user(s) will be listed
6. **Check** the box next to the relevant user
7. Click **Submit**

To List Team Members

1. Click the **List or Remove members** link

To Remove Team Members

1. Click the **List or Remove members** link
2. **Check** the box next to the relevant user(s)
3. Click **Submit**

To Manage Team Access to Rows of the Plan

1. Click on the **Manage team assignment** link
2. In the matrix, click on an **Action Team** or **Review Team** cell
3. **Select a team** from the pop-up

*Note: You must first have created additional teams for them to appear in the pop-up. See **Create a New Team** above.*

4.2.5 Workflow

Note: This function only applies to Free-form plans.

If a workflow channel has been assigned to a plan via the Control Panel, a workflow status column will appear in the Edit plan view and also in the plan fieldset.

You may also view any pending workflow items by clicking the inbox icon in the plans page header bar.

To select and update a workflow step, open the fieldset and click on the **Edit** link. If the step is not available it will show **Locked**. Availability is determined by the access setting in the Control Panel. For example, if you are on the Action Team for a plan section, you might be able to select a 'Request Approval' workflow step not the 'Approved' step. If you are the Manage Team you will be able to select any step by clicking the **Manage** link next to the locked status in the fieldset.

When you select a step, you can also add an optional **comment**.

4.3 Goals

4.3.1 Goals

Note: This function only applies to Goal-based plans.

If goals have been added to a Goal-based plan, they will be listed here.

For All plans Started between 3 Feb 2013 and 3 Feb 2017 Search

Goal ID	Goal Detail	Reporting Unit	Plan	Started	Finished	Function
Engineering-G001	Achieve a graduation rate of greater than 80%.	Engineering	Strategic Goals	2015/2016		Details Links
Engineering-G002	Complete the new mechanical engineering test facility	Engineering	Strategic Goals	2015/2016	2016/2017	Details Links
Engineering-G003	Assessment process	Engineering	Strategic Goals	2015/2016		Details Links

Use the search option at the top of the list to filter results by plan, date and keyword.

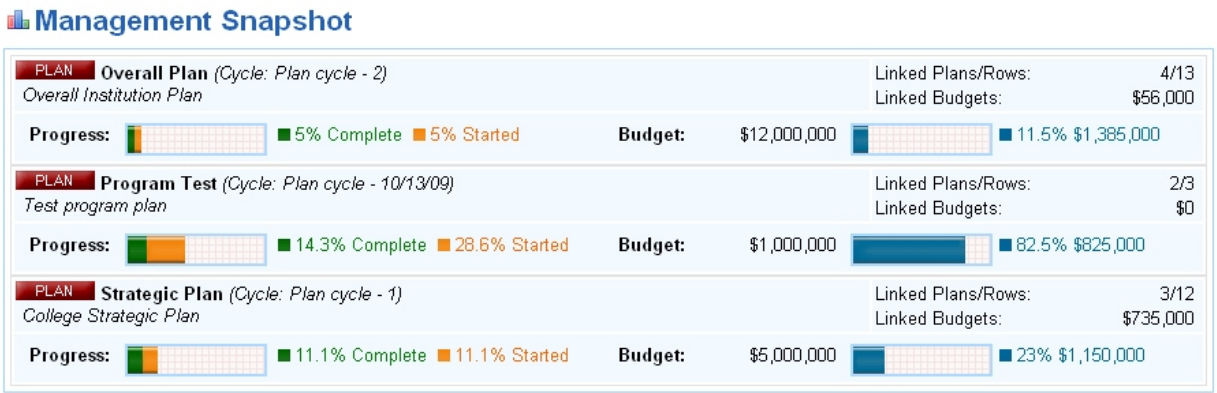
If a goal has been finished, the last cycle will be shown in the Finished column.

Click the **Details** function link to view the input for this goal for each applicable reporting cycle. Click the **Links** function to see what other goals are linked.

4.4 Summary

4.4.1 Plan Snapshot

Users with a role of Manager can view a snapshot report of all active plans. The list will look similar to the following:



A number of metrics are shown for each plan:

A **Progress Bar** shows the percent of fields started and completed.

A **Budget** for the plan (if applicable).

The total of **Budget Input** (if applicable).

The number of **Links In** from Plans and Rows in those plans (if applicable).

The total of any **Budget Fields** from linked plan rows (if applicable).

If in List view, the left panel of the summary report lists the plans with two function links. In Group or Department view, these links are shown in the snapshot summary panel.

Click on **View** to open the plan summary. Overall progress is displayed and the current status of rows, fields and budget input can be viewed.

Click on **Map** to display a graphical representation of the links to the selected plan. From the tree you can view other plan maps, plan rows or surveys by clicking on the appropriate link.

4.5 Surveys

4.5.1 Overview

The Xitracs Survey feature lets you gather information from faculty members using a familiar survey tool. Surveys can be built with different response options, such as text input or radio button selection. Files may also be uploaded in support of a response.

Building, linking and distributing a survey is via Control Panel > Manage Surveys. Respondents may access a survey via an email (See Manage Surveys > Distributing a Survey) or via the optional Xitracs Portal.

4.5.2 Activity

The activity report for a survey shows list of participants and the status of response. The status may be one of the following:

Not started	The survey has not yet been started by the participant.
Started	The survey has been started but not completed.
Finished	The survey has been completed.

Finished (U) The survey was previously completed and has been reopened and updated .

4.5.3 Questions

This report lists the questions in the survey, together with an indication of whether a response is required.

Note: Setting questions is a control panel function. See Control Panel > Manage Surveys > [Survey] > Questions

4.5.4 Responses

The current responses for the selected survey are returned in this report.
The responses may be viewed by Participant or by Question or downloaded to an MS Excel® spreadsheet.

4.6 Reports

4.6.1 Activity Log

The Activity log lists, in descending chronological sequence, all of the user activity that has occurred for a plan in the Edit mode, including due date changes, status changes and document updates.

Included in the report are the **Section Reference ID** (where applicable), the **Section Description**, the **Activity**, **Date** and **Time** and the **User Name**.

4.6.2 Due Date

The Due Date Report lists all sections that meet a set of criteria. These can be **Past Due** and **Due within** a specified period of days.

The preparation **Status** may be filtered, as required. Any sections with a status of **Complete** are excluded.

***Note**: The generated report will be in View mode. Changes to a plan section must be made using the Edit function.*

4.6.3 Progress

The Progress Report lists the number of sections, by status and as a percentage of total sections.

4.6.4 Spreadsheet

You can download the plan fields in an MS Excel® format (.xls file).
Click the link to generate the spreadsheet. Two worksheets are included: **Plan Fields** and **Field Keys**.

4.7 Control Panel

4.7.1 Manage Plans

The **Manage Plans** function allows a manager with control panel access or system administrator to control which plans are available to users, plus perform a number of administrative activities.

To Create a Plan

1. Click the **Create a new plan** link. (If the Goal-based plan option is enabled, you will be able to select either a **Free-form** or **Goal-based** plan.
2. Enter a plan **Title** and **Description**. *The title must be unique. You will receive an alert message if you enter a title that is already in use.*
3. For a **Goal-based plan**, you have the option of having the system **automatically build** plan headers from all or selected departments.
4. Check **Budget** if you want to associate a budget with the plan. *You can set an budget value later using Manage Plans > Settings*
5. Check **Report Target** if you want to allow other plans or surveys to link to this plan.
6. For a **Goal-based plan**, check the **Workflow** parameter if you want each goal to have a workflow associated with it.

Note: Free-form plans can also have workflow associated if required.

7. Select the **Field Set** to be used. A list of the fields in the set will be displayed. *This function defines the input fields to be completed by users assigned to the plan. You can edit these fields later; see Plan fields. See also Control Panel > Field Sets.*
8. Click **Submit**

As you add plans the list will look similar to the following:

Title	Description	Cycle	Timeframe	Status	Target	Function
AQIP Action Projects	Sample AQIP Action Projects	1	2009-2010	Offline	Yes	Edit Build Copy Delete Properties Teams Settings
Institution Strategic Plan	Institution-wide strategic plan	1	2009-2012	Online	Yes	Edit Build Copy Delete Properties Teams Settings
Operational Plan	Department planning activities	2	2011-2012	Online	Yes	Edit Build Copy Delete Properties Teams Settings
Program Example	Program Plan example	2	2010-2011	Online	Yes	Edit Build Copy Delete Properties Teams Settings
Science Department	Science Department Annual Plan	1	2009-2012	Online	Yes	Edit Build Copy Delete Properties Teams Settings

Each plan is listed with a **Title** and **Description**. It may also be listed as **Free-form** or **Goal-based**.

The **Cycle** contains the number of the cycle that the plan is currently in. Plan cycles are set using the Properties function. *For additional information see Manage Plans > Plan Cycles*

The **Timeframe** contains the name of the timeframe that is associated with the cycle. Timeframes are set using the Properties function. *For additional information see Control Panel > Timeframes*

The **Status** of a plan determines its availability to team members. The status is set using the Properties function. There are three possible settings:

- **Online** - the plan is available and may be edited by the assigned team members
- **Locked** - the plan is available for viewing only; it cannot be edited by the assigned team members
- **Offline** - the plan is not available; it will not appear on the assigned team members list of plans

The Build function lets you add rows to your plan. A plan is not useable unless it is first built. *See Building a Plan*.

You cannot build a plan unless it has a status of Offline. See Properties.

A plan may be removed from the list by using the **Delete** link, provided that it has a status of **Offline**.

Removing a plan is irrevocable and will delete all associated field data and supporting documents.

To be available, users must next be assigned to one or more of the plan's teams.
Click the **Teams** function link and follow the process described in the Teams section to achieve this.

4.7.1.1 Building a Plan

Once plan has been created, you can put it together it using the Control Panel > Manage Plans > [Plan] > **Build** link. *Note that this link is only active if the plan status is Offline.*

A plan consists of rows that are analogous to headings, sections or paragraphs in a written document.
For **Free-form** plans the structure can be made hierarchical and can consist of , **Action Rows** and **Information Rows**.
For **Goal-based** plans, only **Header Rows** can be defined. The goals under each header are added and updated by assigned portal users.

A **Header Row** lets you add child rows to group other rows. Does not allow field input or linking.

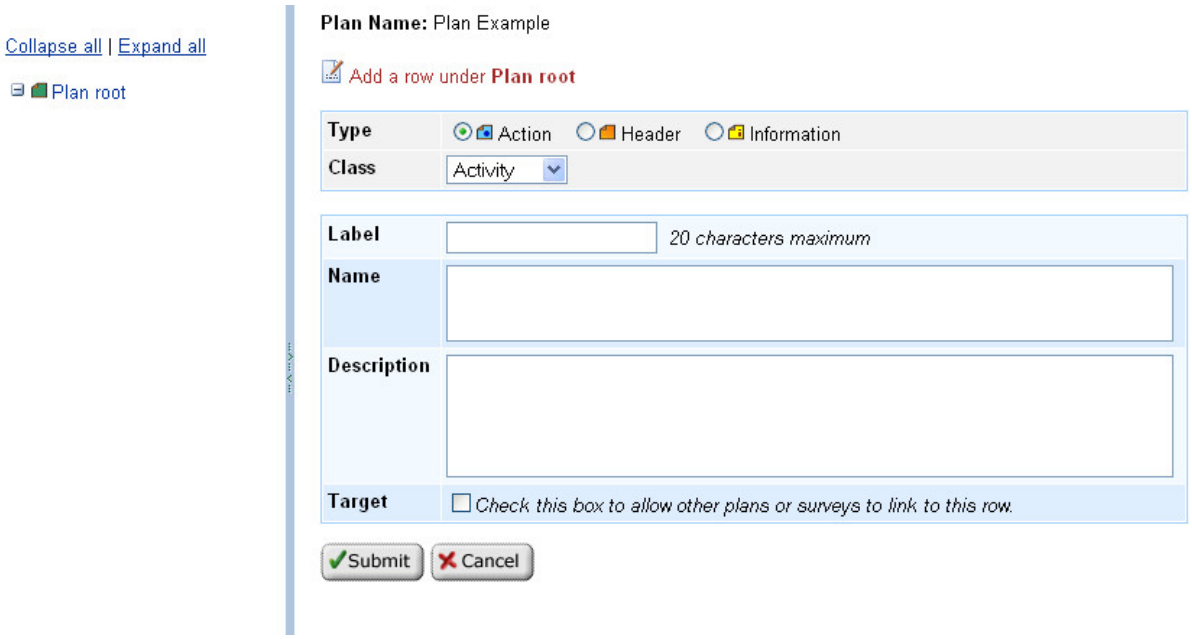
An **Action Row** allows for field input, linking and due dates but does not let you add child rows.

An **Information Row** is intended for information only and does not allow field input, linking or child rows.

The build page consists of two panels:
The left panel contains the **Plan Tree**. This is a dynamic representation of the plan structure. You can edit a plan using this tree.
The right panel contains the **Row Attributes**. This displays details about the selected row. You can edit the row attributes in this panel.
You can re-size the panels by clicking on the vertical divider bar and dragging it to the right or left.

To Start Building a New Plan

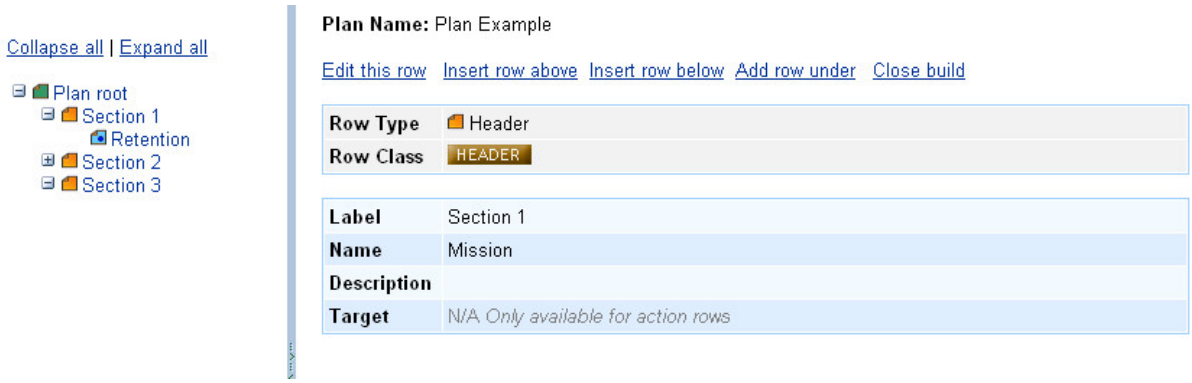
When you start building a new plan, the left panel will display only the **Plan root**. In the right panel, click the **Add row** link and the following row attributes will display:



The editable attributes consist of the following:

1. **Type**: Select the type of row. *The default setting is an Action row.*
2. **Class**: Select the row class. *This sets the graphic displayed in the Edit plan and Snapshot views. Not available for information rows.*
3. **Label**: Enter a label for the row, e.g. a paragraph number such as 2.1 or a short title. *Cannot exceed 20 characters.*
4. **Name**: Enter a name for the row.
5. **Description**: Enter an optional description. *This will appear below the row name in the Edit plan view.*
6. **Target**: Check this box to allow other plans or surveys to link to this row. *Only available if overall plan allows report linking; see Manage plan. Not available for information rows.*

As you continue to add rows, the tree in the left panel will grow and show the hierarchy. If you need to view an existing row, click on the link and the detail screen will open in the right panel.
At the top of the detail screen there will a number of links. You can **Edit** the row details or **Insert a row** above or below it. If the row type you have selected is a header, you will also be able to **Add a row under** (i.e. add a child row). If the row type is Header and it has child rows (as in the example below), the **Delete row** link will not appear until any child rows have first been deleted.



You can change the order or hierarchy of rows by clicking the **Move this row** link.

When you want to stop building the plan, click the **Close build** link to return to the plan list. You can continue building the plan later as required.

4.7.1.2 Copying a Plan

You can copy an existing plan rather than creating a new plan. This is useful if you are using a similar plan structure across multiple entities, such as departments or programs.
Once you have copied a plan, you can edit the new plan using the Build function if you want to change certain rows or the Fields function to change the input fields.

To Copy a Plan

1. Click the **Copy** link next to the source plan you wish to copy
2. Edit the **Title** and **Description**. *Note that you cannot have two plans with an identical title.*
3. Edit the Row and Column **Labels** if appropriate.
4. Check **Report Target** if you want to allow other plans or surveys to link to this plan.
5. Check the **Fields** you want to copy. *Note that no existing input is copied.*
6. Click **Submit**

4.7.1.3 Plan Properties

The availability of plan, its status and cycle is controlled via the **Properties** function.

To Set the Properties of Plan

1. Select a **Status** There are three possible settings:
   - Online - the plan is available and may be edited by the assigned team members.
   - Locked - the plan is available for viewing only; it cannot be edited by the assigned team members.
   - Offline - the plan is not available; it will not appear on the list of plans for assigned team members or on the summary snapshot.
2. Add an optional **Comment** (this will display for each team member below the plan description field, but will not be included in any published version).
3. Start a **Cycle** for the plan.
   - If this is the initial plan cycle, you must select a timeframe before the plan may be put online.
   - If this is a subsequent cycle, select a new timeframe. If there is no new timeframe available, a warning message will be displayed.
   - If you want to carry forward the content of any fields to the new cycle, check the relevant fields.

Note: Once you have started the next cycle, assigned team members will not be able to edit information in the prior cycle.

4. Select a **Website Template** to be used for this plan (if none is available, the default template will be used). See the templates function for more detail.
5. Select a **PDF Template** to be used for this plan (if none is available, the default template will be used). See the templates function for more detail.
6. For a **Free-form plan**, you can select a Workflow Channel if available and required. Workflow channels cannot be associated with Goal-based plans.
7. Click **Submit**

4.7.1.4 Plan Settings

Plan Budget

You can set an overall budget for the plan in whole dollars (no cents). This will be displayed on the Summary snapshot page.
Note: Only available if plan includes a budget. See Manage plans.

Plan Cycles

Click on the **Cycles** link to list the current and prior cycles for this plan. Use the **Edit** link to change the cycle **Name** is appropriate.
Note: To start or change a plan cycle, see the Properties function.

Plan Fields

The input fields for a plan may be edited. You can add and delete fields or change the attributes of an existing field.

To Add a Field

1. Click the **Add** link.
2. Enter the field **Name** and optional **Detail**.
3. Select the field **Type**. *Field types that require a selection must have parameters. See **Edit a Field** below.*
4. Check the **Attachments** box if you want to allow files to be uploaded.
5. Enter a field **Key** (optional). *Keys can be used to identify fields in spreadsheet reports.*
6. Click **Submit.**

To Edit a Field

1. Click the **Edit** link next to the field.
2. Change the field attributes as appropriate.
3. Change the field **Position** if required. *This determines the order in the list of fields.*
4. Click **Submit**.
5. If the field requires a selection, click on the **Parameter** link.
6. Click the **Create a Field parameter** link.
7. Enter the parameter **Name** and optional **Description**.
8. Enter an answer **Key** (optional). *Keys can be used to identify answers in spreadsheet reports.*
9. Click **Submit**.

Published Plan Settings

Each plan may have its own set of specific attributes for the published plan website or document (PDF) format.
Note: Some of these functions may not apply to custom designed website templates.

Document Banner

1. Click the **Banner** link.
2. **Browse** for a suitable graphics file. This must be a GIF image file that conforms to the required dimensions. A minimum of 300dpi is recommended for good print quality.
3. Click **Submit**.

Document Header & Footer

1. Enter text for the **title**, **header** and **footer** as appropriate.
2. Click **Submit**.

Preamble

Click the Preamble function link to open the Text Editor and add an introduction to a plan in both website and PDF formats. When finished, click the Submit button and the preamble will be updated. It may be edited at any time as required.

Website Banner

1. Click the **Banner Upload** link.
2. **Browse** for a suitable graphics file. This should be a GIF image file that conforms to the required dimensions.
3. Click **Submit**.

Images that exceed the recommended dimensions may cause problems with the tabs on the website.

Website Header & Footer

1. Enter text for the **header**, **sub-header** and **footer** as appropriate to appear on each website page (excluding the welcome page).
2. Click **Submit**.

Website Locations

The locations feature allows you to specify one or more web-server locations for your published plan. At least one location must be specified in order to publish a plan website to a web-server.

1. Click the **Create** location link.
2. Enter a **Name** for the location.
3. Enter the **Server** information. This will typically be an IP address or FTP path.
4. Enter a **Logon** and **Password**.
5. Enter a **Path**. This is a directory location on the server.

   Note: If you are not familiar with these settings, contact your Network Administrator.

Website Tabs

The standard website template format uses a tab metaphor to access the various parts of a plan.

These labels can be edited if required. Check the box to enable/disable a tab.

Website Welcome Message

The home page of the plan website includes an area for a welcome message. Use the text editor to add a message.

Portal User Settings

Email Portal Users

If any rows in the plan have been assigned to portal users, you can email each of them a secure link to the plan fields.

1. Edit the email **Subject** if appropriate.
2. Add a **Message** which will appear in the body of the email. For example "Click on this link to access and update your plan input."
3. Click **Submit**. The email(s) will be generated.

4.7.2 Plan Field Sets

The Field Set function provides a convenient tool to pre-build fields that may then be used when you create a new plan. After the plan is created, individual fields may be edited if required by using the Plan Settings > Fields function.

Note: Depending on your system configuration, certain default field sets may have been pre-loaded at the time your Xitracs system was installed or updated. You can edit or remove these if appropriate.

To Create a Field Set

1. Click **Create** a field set.
2. Enter a **Name** and optional **Description** for the set.
3. Click **Submit**.

Once you have created the field set, you now need to add the fields.

1. Click the **Fields** link next to the new set.
2. Click the **Add** a field link.
3. Enter a **Name** and optional **Description** for the field.
4. Select the field **Type**. This determines the type of response required.
5. Check the **File Attachments** box to allow a respondent at upload files is support of the input.
6. Enter an optional field **Key** if appropriate. You can use this to define a unique key value to a field for report analysis. See Reports > Spreadsheet.
7. Click **Submit**.

For fields that require a selection as a response, you will need to set the parameters.

1. Click on the **Parameters** link next to the new field.
2. Click **Create** a field parameter.
3. Enter the parameter details. The details will differ depending on the parameter type.
4. Click **Submit**.
5. Add additional parameters if appropriate.

4.7.3 Plan Groups

Plans can be associated with a **group**, making it easier to organize and navigate plans lists.
A plan can be linked to a subgroup via the Control Panel > Manage Plans > Edit function.

These groups and subgroups will appear when the Group view option is chosen by a user after selecting the main Plans tab.

Plans can also be associated with a **department**. The department and its parent school must first exist.

For those systems **with** the Xitracs Credentials™ module installed, Schools and Departments are managed via the Credentials > Control Panel > Departments function.

For those systems **without** the Xitracs Credentials™ module, Schools and Departments are managed via the Administration > System Configuration > Departments & Schools function.

4.7.4 Templates

The published format of a plan can be configured to provide a customized 'look-and-feel' using a template.

You can assign a **Website** or **PDF** template to a specific plan via the Manage plans > Properties function.

Website templates have a *.xtm* extension. PDF templates have a *.xtf* extension. Both can be provided by Concord as a professional service or customer developed.

***Note**: Template development requires knowledge of HTML and XSL. A design guideline document is available from Concord on request.*

To Upload a Plan Template

1. Click the Website or PDF **Template Upload** link
2. **Browse** for a template file
3. **Edit** the template name as appropriate
4. Click **Submit**

The template name may be changed later if required by using the **Edit** link.

To remove a template from the system use the **Delete** link. If the template is already assigned to a standard, it will be replaced by the system default website template.

If the template supports image graphics, these may changed using the **Image** link. Use the **Replace** function to upload a new JPEG image file which must have a JPG extension.

***Note:** The new image may be of any dimension, but care should be taken that the size is consistent with its position and appearance on the page when the website is rendered. This can be verified by generating a preview of the plan. If the image does look suitable, upload a replacement.*

4.7.5 Timeframes

Timeframes define the period of time for a plan cycle. For example, you might create a timeframe named "2013 Fiscal" which has a timeframe of July 1, 2013 to June 30, 2014. This can then be associated with a plan cycle using the Manage Plans > [Plan] > Properties function.

To Create a Timeframe

1. Click the **Create** link.
2. Specify a **Name** for the timeframe. *Hint: Giving the timeframe an obvious name such as "2013-2014" might help you remember it later.*
3. Specify a **Start** end **End** date.
4. Click **Submit**.

Use the **Edit** or **Delete** links to change or remove a timeframe.

⚠ *Caution. Do not delete a timeframe if it is associated with a plan cycle. Change the cycle link first using the Properties function.*

4.7.6 Manage Surveys

The Xitracs Survey feature lets you gather information from faculty members using a familiar survey tool. Surveys can be built with different response options, such as text input or radio button selection. Files may also be uploaded in support of a response.
Note: Respondents must be existing faculty members.

The control panel list of surveys will look similar to the following:

Title	Available from	Closing date	Available	Status	Plan Links	Function
2010 Department Survey	12/2/09	12/5/10	Yes	Open	1	Edit Delete Link Questions Distribute Respondents
Library Upgrade	8/10/09	12/10/09	No	Closed	1	Edit Delete Link Questions Distribute Respondents
Program Improvement	1/1/10	5/15/10	Yes	Open	13	Edit Delete Link Questions Distribute Respondents
Program Review Process	2/9/10	2/9/11	Yes	Open	0	Edit Delete Link Questions Distribute Respondents

The from and closing **Dates** columns show when the survey will be available to respondents. Outside of these dates the survey will have a status of **Closed** and will not be available.
The **Available** and **Status** columns show whether the survey will be included in a respondents survey list. *Availability is set automatically (see dates above) or can be set manually using the **Edit** function.*
The **Plan Links** column displays the number of plan links in the survey. *See **Link to Plans** below.*
The **Function** column includes links for managing a building a survey. *See below.*

To Create a Survey

1. Click the **Create** link.
2. Enter a **Name** and **Description** for the survey.
3. Check the box if the survey is **Available**.

Note: This manual setting allows you to pre-build surveys and then determine availability later.

4. Set the **From** and **Closing dates**. *Outside of these dates the survey will not be available to respondents*.
5. Enter any optional **Welcome text** to be displayed with the survey, if appropriate.

To change any of the above survey settings, use the **Edit** function link. To delete a survey, use the **Delete** function link.

If you want to link the entire survey click the Link function. To link individual survey questions, see Building a survey.
Once a survey has been created, you need to build the survey by adding **Questions.**
Once the survey is complete, you can send it to respondents by clicking the Distribute link. *See also Distribution Lists*.
The Respondents function will let you resend an email survey invitation and access other functions.

4.7.6.1 Building a Survey

Once survey has been created, you can put it together it using the Control Panel > Manage Surveys > [Survey] > **Questions** link

To Add a Survey Question

1. Click the **Create** link.
2. Enter the **Question** and optional **More Detail**.
3. Enter an optional **Question Key**. *This is a value you can enter that will be included in survey response reports, to support analysis.*
4. Select the question **Type**. *Depending on the type, you may need to add selection parameters. (See*

Edit a Survey Question below).

5. Check the **Required** box if a respondent must answer this question in order to complete the survey.
6. If the question type is Selection, check the **Multi-Answer** box if a respondent may select more than one answer.
7. Check the **File Attachments** box if a respondent may upload one or more files in support of an answer.
8. Check the **Page-break Before** box to have the question presented on a new page.
9. Click **Submit**.

To Edit a Survey Question

1. Click the **Edit** link next to the question.
2. Change the question attributes as appropriate.
3. Change the question **Position** if required. *This determines the order in the list of questions.*
4. Click **Submit**.
5. If the question requires a selection, click on the **Parameter** link.
6. Click the **Create a Question parameter** link.
7. Enter the parameter **Name** and optional **Description**.
8. Enter an answer **Key** (optional). *Keys can be used to identify answers in spreadsheet reports.*
9. Click **Submit**.

You can link a survey question to a plan row if the target plan and row are configured to accept reporting links. See Control Panel > Manage plans.

To Link a Survey Question

1. Click **Link** next to the question.
2. Any plans that are available as targets will be listed in the drop-down.
3. **Select** a plan.
4. **Select** one or more available rows in the plan.
5. Click **Submit**.
6. Repeat to add to another plan.

Note: To remove a link, follow the above steps and uncheck the row(s) then click submit.

4.7.6.2 Distributing a Survey

Once a survey has been built, it can be distributed by email to respondents. To do this you must have created at least one Distribution List.

1. Click the **Distribute** link.
2. Select the required **Distribution List** from the drop-down. *You can verify the list of respondents by clicking the **Show members** link.*
3. Enter a **Subject** and **Message** to be included in the email containing a link to the survey.
4. Click **Submit**. An email will be generated and sent to each of the respondents on the list.

The confirmation page will show the number of email addresses to which the survey has been sent. If there is an exception it will be shown.

For example, a duplicate email will not be sent if a respondent has already been notified by a previous email.

If you need to re-send an email to one or more of the respondents, see Control Panel > Manage Surveys > Respondents.

4.7.6.3 Linking to Plans

You can link an entire survey to a plan row if the target plan and row are configured to accept reporting links. See Control Panel > Manage plans.
If you just want to link specific survey questions see Building a Survey.

To Link a Survey

1. Click **Link** next to the survey.
2. Any plans that are available as targets will be listed in the drop-down.
3. **Select** a plan.
4. **Select** one or more available rows in the plan.
5. Click **Submit**.
6. Repeat to add to another plan.

Note: To remove a link, follow the above steps and uncheck the row(s) then click submit.

4.7.6.4 Respondents

Use the **Respondents** function link to list the status of each respondent and for the following actions:

- To **Re-send** a survey invitation email.
  Click the link to send another email invitation to the respondent.
- To **Remove** a respondent.
  If you remove a respondent, the survey will no longer be available to that individual.
- To display the invitation **Token**.
  The token is a secure link that was included in the specific respondent's invitation email. You can click on the link to verify it opens the survey correctly.

4.7.7 Survey Distribution Lists

Survey invitations are emailed to respondents via distribution lists of faculty members.

To Create a Distribution List

1. Click the **Create** link.
2. Enter a **Name** and **Description** for the list.
3. Click **Submit**.

Use the **Edit** link to change the above information or the **Delete** link to remove the list.

Once a list has been created, click the **Members** link to build and manage the list of respondents.

Use the **Add** link to create a list manually or the **Bulk add** link to paste from a separate list, e.g. from Notepad.

To Build a Member List Manually

1. Click the **Add** link.
2. Enter a **Name**. The system will automatically display name matches.
3. **Select** the required name.
4. Use the **Enter** key or click the icon. Use the icon to remove.
5. Once the list is built, click the **Submit**.

To Build a Member List by Bulk Addition

1. Click the **Bulk add** link.
2. **Paste** a list of email addresses into the box, only one entry per line allowed.
3. Click **Submit**.

Note: An email addresses must match an existing faculty member or it will be rejected.

Members may subsequently be deleted from a list by clicking the **Remove** link.

4.7.8 Workflow

A simple workflow feature for plans provides the ability to define steps such as 'Prepare', 'Review', 'Approve' and select which team members are able to select a step. Workflow steps are defined within a **workflow channel** and a channel can then be assigned to a plan via the Manage Plans > [Plan] > Properties function.

To Create a Channel

1. Click the **Create** link
2. Add a **Name** and optional **Description**
3. Check the box to make the channel **available** for assignment
4. Click **Submit**

Use the **Edit** link to update any of the above information

To Add Steps to a Channel

1. Click the **Add Step** link
2. Add a **Name** and optional **Detail**
3. Select the **Access Type**. This relates to the team type for to a plan
4. Make sure that the 'None - end of flow' access type is the last step
5. Click **Submit**

Use the **Edit** link to update any of the above information

5 Xitracs Programs™

5.1 Overview

The **Xitracs Programs™** module allows you to manage program assessment reporting and curriculum mapping. Used in conjunction with the Xitracs Portal™, assessment reports may be gathered easily by assigning programs to a portal user for input or peer review. Programs can belong to a group and a department, making it easier to organize them. Creating and managing a program is via the Control Panel.

Program assessments are managed in cycles, according to a time track which is specified by the institution. Three cycles are always displayed to a program assessor or peer reviewer: the Current cycle (i.e. falls within the current timeframe), Prior cycle and Next Cycle. For example, if the cycle timeframe is Jul 1 - Jun 30 and today's date is Mar 15 2014, then the Current cycle will be Jul 1 2013 - Jun 30 2014, the Prior cycle will be Jul 1 2012 - Jun 30 2013 and the Next cycle will be Jul 1 2014 - Jun 30 2015.

Input for each program assessment cycle is via fields which are defined using the Control Panel > Field Sets function. The available or open cycle for each field can be specified at the time the field set is created. In the example below, there are four fields: Goal, Objective, Result and Reflection. The Goal field in this case is set to be available for editing for the Next cycle; in other words, during the current cycle Jul 1 2013 - Jun 30 2014, a program assessor will be able to enter the goal for the next cycle (time frame Jul 1 2014 - Jun 30 2015). Similarly, a program assessor will be able to add the Reflection for the Prior cycle.

The field names in a program can be changed if this function is enabled. See Control Panel > Program Settings. This is a convenient way of having a standardized field set across multiple programs, while still providing the flexibility to change one or more field names in a specific program.

Field	Available Cycle for Assessment Input		
	Prior	Current	Next
Goal	No	No	Yes
Objective	No	Yes	No
Result	No	Yes	No
Reflection	Yes	No	No

The transition from one cycle to the next is managed by the system automatically, based on the specified time track. So, using the example of a Jan 1 - Dec 31 time track, on Jan 1 2013 the Jan 1 - Dec 31 2012 cycle will move from current to prior. A grace period can also be specified to keep fields open after the cycle availability closes. A field can also be manually locked in the portal by a manager. This is useful when you do not want a program reviewer to edit a particular field, such as a mission statement.

If the Planning Module is installed, fields may optionally be linked to one or more sections of a plan. This is a useful way of generating a plan report that includes data from one or more program assessment reports, for example to use in a program review.

Courses in a program can be defined. If the Assessment Module is installed, course assessment data can be collected and reported by semester. Program Fields may also be linked to one or more courses, for example to show how a course is part of addressing a particular objective.

The Curriculum Mapping feature lets you manage your maps online. A map consists of a matrix which includes both outcomes and courses, together with a level such as 'Introduced' or 'Emphasized'. Both

general maps and program-specific maps can be created and then linked to a program. With Outcomes Mapping you can map course outcomes to program or Gen-Ed outcomes.

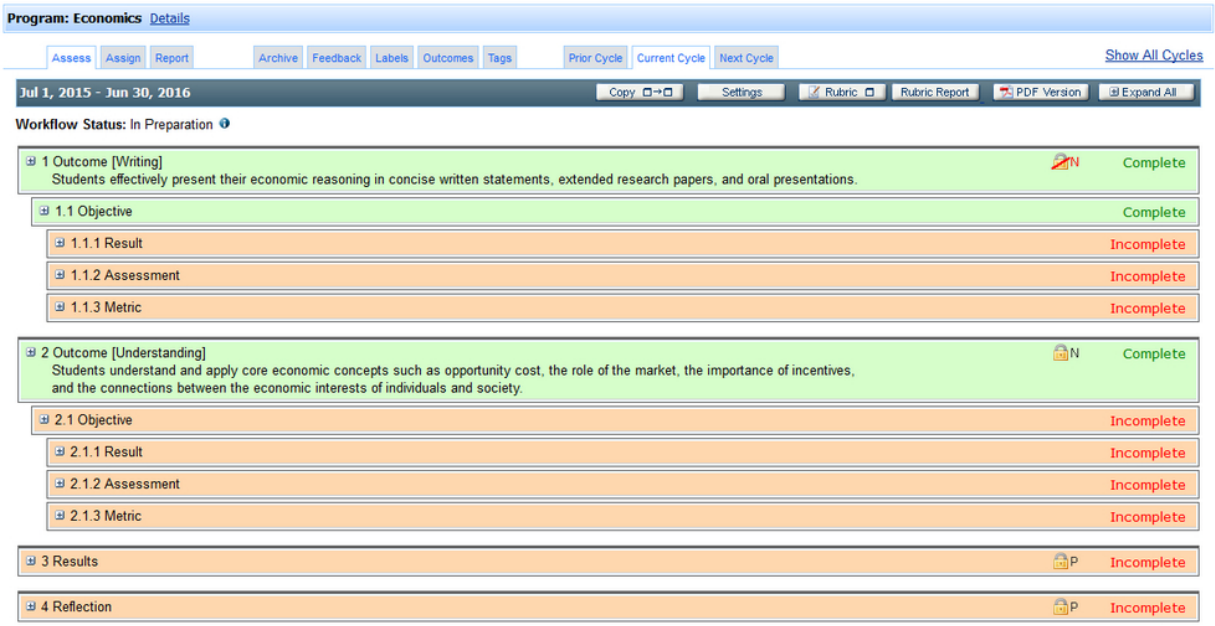
Programs will be listed in the left menu on the page by group or department and the number of available programs will be shown. Click on the group or department link to list the programs, then click the View link to open the selected program.

5.2 Programs

5.2.1 Assessment

The Programs tab opens the program coordinator/adminstrator view of the selected program.

By default, the fields for the **Current Cycle** will be displayed. Click on the **Prior Cycle** or **Next Cycle** tab to view these fields. Note that the fields themselves and their associated properties are defined in Control Panel > Field Sets.



The header bar shows the date range of the selected cycle. This is determined by the cycle time track defined in the system. Also in the header bar are a number of buttons:

Click the **Copy** button to select fields from a previous cycle. Select a cycle, then the field(s) to be copied and whether you want to include any links.

Click the **Rubric** button to open an available program rubric for scoring. You can also generate a snapshot view of program rubric scores by assessor, peer and coordinator by clicking the **Rubric Report** button.

Click the **Settings** button to change the workflow status (if enabled) or to toggle whether a program assessment reporting cycle is to be skipped.

If a program rubric has been defined and assigned to this program type, click the **Rubric** button to open for scoring.
You can also generate a snapshot view of program rubric scores by assessor, peer and coordinator by clicking the **Rubric Report** button.

In the above example, the field set consists of three main (or top-level) fields: 'Program Mission', 'Outcome' and 'Reflection'. Under the field 'Outcome', there is a sub -field 'Objective', which in turn has sub-fields 'Assessment', 'Metric' and 'Result'. See also the Labels tab function which lets you change the field name. If the Labels function is enabled, an additional tab is displayed.

If a field has been configured to be open for editing in another cycle, a lock icon will appear with a letter indicating the applicable cycle: 'P' for Prior, 'C' for Current and 'N' for Next. The Reflection field above shows the lock icon with the letter P; this means the field can be edited by portal users only for the prior cycle. An 'M' lock code indicates that the field has been manually locked, meaning that it cannot be edited by an assessor in this cycle.

Editing Fields

Click anywhere on the field header to open it for editing. You can also use the **Expand All** button in the header bar to open all fields. Once open, any existing field content will be visible, together with available links as follows:

Settings

Click to mark the field as 'Complete' or 'Not applicable' (if allowed in the field set parameters). You may also lock a field in the portal or, is the field is locked by the cycle, override the cycle lockout.

Note: The Settings link is not available to Portal users.

Add new

This link appears if the field set parameters allow an additional field of the same type to be created; for example to add a new Goal. If the field has dependent or 'child' fields, these will also be added and the numbering updated automatically.

Edit

Click this link to edit/update the response for a field. The format of the response will depend on the field type, e.g. text, a number, selection from a drop-down etc. The field type is part of the field set parameters. You can also enter a **short name,** unless the field is an Outcome, (see below)**.**

If a field is defined as an Outcome, you can select an outcome from any that have already been linked to the field (see below).

Copy

You can copy a response from a previous cycle. Select a cycle, then the field to be copied and whether you want to include any links.

Course

This link appears if the field set parameters allow supporting courses to be added as part of a response; for example, to indicate that a course addresses an objective. The courses available are those belonging to the program. See Control Panel > Manage Programs > Courses.

File

This link appears if the field set parameters allow supporting files to be added as part of a response.

Link

Click to link this field to a program outcome and/or other outcome. For systems with the **Planning Module** installed, you can also link to a section of a plan. The plan sections available are dependent on those

plans that have been set up to support reporting links. See Manage Plans > Building a Plan for more details. The linked program review data can then be output as part of publishing a plan.

Tag

You can add a tag consisting of one or more words. As you type the system will auto-search to list any existing tags. The tags are used to generate a word cloud based on the frequency in the review cycles.

Comment

Program coordinators, assessors and peer reviewers can add in-line comments. If the field has been set to include a Result (e.g. Approved) you will also be able to select this option when adding a comment.

5.2.2 Assignment

Portal users can be assigned as either an **Assessor** or a **Peer Reviewer**. An Assessor has the ability to input information (i.e. write the assessment report), whereas a Peer Reviewer can only view information but can provide feedback using the **Comments** function.
If a field has the Result parameter set, a peer reviewer can also set a status when entering a comment, such as Approved.

Select a portal user to assign to the program. Check the 'email immediately' box to advise assignees by email.

Is the workflow feature is enabled, approval request emails will also be generated.

Assignees can also be imported. See the **Xitracs Data Import Guide**.

5.2.3 Report

A report of the program review can be generated. Select the cycles to be included and the format. If a PDF format is selected, an option to provide a side-by-side view of the selected cycles will be available.

The report presentation format, including the banner graphic, can be customized via a template. See Control Panel > Templates.

5.2.4 Archive

Prior review reports from other systems can be stored in the system. The archive function lets you add these report files so that they can be managed within the context of the program in Xitracs.

Use the Folder function to create categories of reports. Archive items can consist of files or URL links.

5.2.5 Feedback

Program coordinators and Portal users who are assigned as peer reviewers can input comments. Select the period of feedback information you wish to view.

5.2.6 Labels

The field names in a program can be changed if this function is enabled. See Control Panel > Program Settings. This is a convenient way of having a standardized field set across multiple programs, while still providing the flexibility to change one or more field names in a specific program.

Click on the Edit link for the field name you wish to change. Enter a new label value up to a maximum of 60 characters, including spaces.

The field name will now change to reflect this new label.

Note: This function is not available to Portal users.

5.2.7 Tags

The tags used in a specific assessment cycle can be viewed in word cloud format. This is an easy way of seeing the most commonly used terms in an assessment cycle. See also Administration > Manage Tags.

5.2.8 Workflow

If the approval parameter is enabled for a program assessment field set, a workflow function will be enabled for any programs using that field set.

The workflow consists of 4 steps:

1. In preparation
2. Approval requested
3. Reviewed with comments
4. Approved

A program will start in Step 1. When ready, a portal user assigned as an Assessor (i.e.to write the assessment report) can change the workflow to Step 2. At this point, an email is generated to any portal user assigned as a Peer Reviewer. The peer reviewer can then set the workflow to Step 3 or 4, at which point an email is generated to the Assessor.

Program administrators/coordinators can set any workflow step by clicking the Settings button in the Assessment view.

5.3 Search

5.3.1 Program Search

You can search across programs using one or more keywords. For example, enter the term "graduation rates" and the system will search for any programs where the response text and/or field short name matches the term.
Use the filters to narrow the search to include specific fields, groups, cycles or program types. The Course filter lets you select only those fields that are linked to a specific course. When you enter a course the system will auto-search only for those courses that have been added to the program.

5.4 Summary

5.4.1 Program Snapshot

The program snapshot provides a graphical overview of the state of response completion for active programs by group. Completion percentages are shown for the Prior, Current and Next cycles for each program. Click on a progress bar to go to the assessment page for the selected cycle. If a program cycle has been set as skipped it will be displayed as **Not Reported** in the progress bar.

The Last Update column shows the date of the most recent assessment input. Click on the date to open the log. Information about the number of assessors and peers assigned to the program, plus plan course and maps links, are also provided.

The Outcomes column displays the number of program outcomes (if defined). Click on this cell to view a list of these outcomes.

The Courses column displays the number of courses linked to the program (if defined). Click on this cell to view a list of these courses, by type and availability.

Arts	Progress				Linked Resources			Assignments	
	Prior	Current	Next	Last Update	Outcomes	Courses	Maps	Assessor	Peer
Literature [1]									
English				9/7/15	6	11	5	1	1
Modern Languages [0] *No programs online*									

Engineering	Progress				Linked Resources			Assignments	
	Prior	Current	Next	Last Update	Outcomes	Courses	Maps	Assessor	Peer
Mechanical Engineering [2]									
Civil Engineering				9/8/15	2	3		1	
Mechanical Engineering				9/4/15	4	5	3	1	

The Maps column displays the number of curriculum maps associated with the program.

The Assignments column display the number of assessors and peers assigned to the program.

5.5 Maps

5.5.1 Curriculum & Outcome Maps

Curriculum Maps

You can create and manage curriculum maps for a program and then map outcomes to courses with a level.

Curriculum maps consist of a set of rows and columns. In the default layout, the rows are the courses that are in a program, while the columns are the outcomes.

A map might look similar to the following example:

Program: English
Map: English 1 Add General outcomes Add Courses Report Close

Course ↓	Outcome →						
	Reading Engage in close reading: interpret textual details and ambiguities, employing a vocabulary of literary terms, theories and/or critical methods.	**Proposition** Advance a proposition or thesis, supporting claims with explicit reasoning and textual evidence.	**Research** Conduct research: find, evaluate and cite secondary sources, using accurate MLA style conventions	**Argument** Place an argument in conversation with the ideas of other critics and theorists.	**Interprete** Formulate a research question and locate it within an interpretive context, such as aesthetic, cultural, ethico-political, historical, intertextual, or social.	**Papers** Compose analytical papers in cogent and coherent prose.	**Effective Writing** [G] Effective Writing
ENGL 0097 [Core] Details Outcomes Syllabus	Introduced	N/S	N/S	N/S	Introduced	N/S	Reinforced
ENGL 0098 [Elective] Details Outcomes Syllabus	N/S	N/S	N/S	Reinforced	N/S	Introduced	N/S
ENGL 1101 [Gen Ed] Details Outcomes Syllabus	N/S	Reinforced	N/S	N/S	Reinforced	N/S	N/S
ENGL 1102 [Core] Details Outcomes Syllabus	Emphasized	N/S	Reinforced	N/S	N/S	N/S	Emphasized

At the intersect of a course and an outcome, there is a cell where the level can be selected. Levels are defined using the Control Panel > Curriculum Maps > Map Levels function.

To **View** or **Create** a curriculum map, select a program group or department from the left menu and the select the Curriculum maps function link next to a program.

To Create a Curriculum Map

1. Click on the **Create a new map** link
2. Give the map a **Name** and **Description**
3. Select whether the map is to be created from the program outcomes or is to be an empty map
4. If an empty map, select the **number of columns** to include
5. Edit the **Column label** if desired (the default label is Outcome)
6. Edit the **Row label** if desired (the default label is Course)
7. Select the Level to be used
8. Click **Submit** and the new map will open

Once a map is open, click on the link in each cell to update the level, as required.
If the map was created from program outcomes (see step 3 above), you will not be able to delete these outcome columns.
If the map was empty when it was created (see step 3 above), you can edit the column headers by clicking the edit icon. You can also remove columns headers by clicking the delete icon.
In both types of map you can add Gen-Ed outcomes by clicking the **Add Gen-Ed outcomes** link. Select

the outcomes group, set and the outcome you wish to add.

Courses are displayed in the first row, with links to the course details, course outcomes and course syllabus. In both types of map you can remove courses by clicking the delete icon. You can also add program courses that may not appear in the map by clicking the **Courses** link. This function will check to see if any courses have been added to the program since the map was created.

Close the map to return to a list of maps for the program. Click the **Report** link to output the map, including outcomes and course information.

Outcome Maps

For systems with the Xitracs Assessment module installed, you can generate a map showing where outcomes are assessed in a program. The map reflects the links that are defined in Assessment > Courses > Outcomes.

5.6 Reports

5.6.1 Program Reports

The Reports tab lists available output and exception reports, categorized by Courses, Maps, People and Programs.

Click on the **View** link next to a report, then select any relevant filters including the output format.

5.7 Control Panel

5.7.1 Field Sets

Program Field Sets

The Field Set function provides the tool to build assessment fields that may then be used when you create a new program.

To Create a Program Assessment Field Set

1. Click **Create** a field set.
2. Enter a **Name** and optional **Description** for the set.
3. Check whether the field set is to be **available**, i.e. selectable when a new program is created.
4. Click **Submit**.

Once you have created the field set, you now need to add the fields.

1. Click the **Fields** link next to the new set.
2. Click the **Add** a field link.
3. If the field is an **Outcome**, check the outcome parameter.

   If a field is an outcome, the respondent will be able to select which outcome to assign, depending on any outcomes that have been linked..
4. Enter a **Name** and optional **Description** for the field.
5. Select the field **Type**. This determines the type of response required. *(Defaults to Text if the field is a program outcome - see above)*.
6. Check the **Allow Attachments** box to allow a respondent at upload files is support of the input.
7. Select whether a field will be **Repeatable**. If selected, respondent will be able to create other instances of the field, e.g. create a new objective.

   If a repeatable field has child rows, these will also be repeated. In the example below, creating an new objective will also create an associated Outcome, Metric and Result field.
8. Check the **Links** box to allow a respondent to link a Program Outcome, External Outcome, General Outcome or Plan *(if the Planning Module is installed)* to the field.

   If a field is a program outcome (see 3 above), the respondent will not be able to link to another program outcome.
9. Check the **Result** box to allow a peer reviewer to select a result (e.g. Approved) for a field. *(See below re specifying result selections)*.
10. Check the **Courses** box to allow a respondent to link a program course to the field. See also Course Field Sets below.
11. Enter an optional field **Key** if appropriate. You can use this to define a unique key value to a field for report analysis when output is to a spreadsheet.
12. Check the **Optional** box if a respondent can mark the field as Not Applicable.
13. Select the **Assessment Cycle** to which the input relates and in which the field will be open to respondents. (See also **Next Cycle** parameter setting below).

    In the example below, Field 7 Reflection is set to be open for input to the prior cycle, so this data can be added after the cycle has closed.
14. Click **Submit**.

To a create a child field, click the **Add** link next to an existing field. See **Goal** and **Objective** in the example below.

Field Set: Assessment Form 1
Description: Assessment Form 1

#	Field Name & Description	Type	Repeatable	Assessment Cycle	Function
1	Mission One	Rich text	No	Next	Edit Add Delete
2	Goal	Text	Yes	Current	Edit Add Delete
3	Objective	Text	Yes	Current	Edit Add Delete
4	Outcome	Text	No	Current	Edit Add Delete
5	Metric	Text	No	Current	Edit Add Delete
6	Result	Text	No	Current	Edit Add Delete
7	Reflection	Text	No	Prior	Edit Add Delete

Note: A Rich text field type includes a text editor in the response entry area.

For fields that require a selection as a response, you will need to set the parameters.

1. Click on the **Parameters** link next to the new field.
2. Click **Create** a field parameter.
3. Enter the parameter details. The details will differ depending on the parameter type.
4. Click **Submit**.
5. Add additional parameters if appropriate.

Other Program Field Set Options

Click the **Edit** link next to a program field set to select additional options.

1. Check the **Next Cycle** parameter to have fields in this cycle always open.
2. Check the **Approval** parameter to enable the Peer Reviewer approval workflow feature for this field set.

Field Result

A field **Result** may be specified, such that a peer reviewer can set a field status (e.g. Approved) using the **Comments** function in the portal.

1. In the **Manage Program Assessment Field Sets** view, click the **Edit field results** link.
2. **Add** or **Edit** result options as required.
3. Check the **Successful** parameter if a result option is to be marked as successful (e.g. Approved).
4. Click **Submit**.

Course Link Field Sets

Course Link Field Sets provide a simple way to enter course data in the context of a program, when a course has been linked to a specific program field such as a goal or objective.

To Create Field Set

1. Click **Create** a field set.
2. Enter a **Name** and optional **Description** for the set.
3. Check whether the field set is to be **available**, i.e. selectable when a new program is created.

4. Click **Submit**.

Once you have created the field set, you now need to add the fields.

1. Click the **Fields** link next to the new set.
2. Click the **Add** a field link.
3. Enter a **Name** and optional **Description** for the field.
4. Select the field **Type**. This determines the type of response required.

Note: Course Outcome Fields can be either a Number or Percentage type.

5. Click **Submit**.

5.7.2 Manage Programs

The **Manage Programs** function allows a manager with control panel access or system administrator to create and activate programs.

Before you start to create programs, make sure you have first defined the field set(s) and groups you plan to use.

To assign a program to a department, the corresponding schools and departments must exist in the system. For systems with the Credentials module installed, see Credentials > Control Panel > Manage Departments. Otherwise see Administration > System Configuration > Departments & Schools.

If you a linking courses to a program, these must already exist in the system. For systems with the Credentials module installed, see Credentials > Control Panel > Course Catalog. Otherwise see Administration > System Configuration > Courses.

If you a linking disciplines to a program, these must already exist in the system. For systems with the Credentials module installed, see Credentials > Control Panel > Disciplines. Otherwise see Administration > System Configuration > Disciplines.

To Create a New Program

1. Click the **Create a new program** link.
2. Enter a plan **Name** and **Description**. *The name must be unique. You will receive an alert message if you enter a name that is already in use.*
3. Select a program Type
4. Select a program Group
5. Select a **School** and then select a **Department** (if available). *To assign these values, they must already exist in the system. See above.*
6. Select a **Discipline** (Optional). *To assign this value, disciplines must already exist in the system. See above.*
7. Click **Submit**

As you add programs the list will look similar to the following:

Name	Type	Group	School	Department	Assessment Field Set	Status	Courses	Function
Biology	Bachelors	Biology	Science	Biological Sciences	*Not assigned*	Not Started	0	Edit Delete Properties Outcomes Courses
English	Masters	Modern Languages	Languages	English	Assessment Form 1	Online	5	Edit Delete Properties Outcomes Courses
French	Bachelors	Modern Languages	Languages	French	Assessment Form 1	Online	0	Edit Delete Properties Outcomes Courses
Organic Chemistry	Masters	Chemistry	Science	Chemistry	Assessment Form 1	Online	3	Edit Delete Properties Outcomes Courses
Practical Chemistry	Bachelors	Chemistry	Science	Chemistry	Default Form	Online	1	Edit Delete Properties Outcomes Courses

The **Outcomes** link lets you define and/or edit the program outcomes. An outcome can be linked to a field in an assessment field set.

Use the **Courses** link to add courses to the program. *These must already exist in the system. See above.* A course can be added using the search function and then adding it to the list. Note that a list must be of courses that are of the same course type. Also, once a course has been added, you can use the **Edit** link to change the course type.

The **Settings** function allows you to add or edit certain program-specific information, such as **Extended detail**. These fields are predefined. See Program Settings.

Once you are ready for the program to be activated, click the **Properties** > **Start** link. You will then be able to select the Program Field Set and Course Link Field Set (if applicable) to be used. Use the Properties function to put a program **Online**, It will then be included in the users list of programs.

⚠ When you start a program make sure you have selected the correct field set(s). You will not be able to change these once started.

5.7.3 Maps

Certain parameters for curriculum maps and outcome maps can be set.

Course Types

The type of course within a program can be defined. The default type is **Core**. Non-core selectable values are Elective and Gen-Ed. Use the **Edit** link to change a type or the **Create** link to add new types. To assign a type to a course, see Control Panel > Manage Programs > Courses > [Course] > Edit. Course types (core versus non-core) determine which outcome map a course will belong to.

Map Levels

The Map Level function creates the list of mapping levels that may be selected when updating a curriculum map. Any number of lists may be created. Use the **Values** link to specify the drop-down selections that will be used when updating a map.

5.7.4 Outcomes

Program Outcomes

Outcomes can be defined for each program. These can be manually added or imported. See the **Xitracs Data Import Guide**.

To Add a Program Outcome

1. Click the **Outcomes** link for the relevant program
2. Click Create an Outcome
3. Enter a short **Label** for the outcome and a description
4. Click **Submit**

Use the **Edit** and **Delete** link to update or remove an outcome.

Gen-Ed & External Outcomes

Outcomes, other than those defined specifically for a program, can also be created. These outcomes may be **Gen-Ed** (institution internal) or **External** (e.g. agency defined).

General and external outcomes are managed in **Outcome Sets**, which in turn is managed in **Outcome Groups**.
A general or external outcome can be linked to a field in an assessment field set. A general outcome can also be included in a Curriculum Map.

You can create one or more **Outcome Sets** for a selected group. For example, under an external outcome group you might create two sets, "ABET Engineering 2013" and "ABET Computer 2013".

Click the **Outcomes** link to add or edit the appropriate outcomes to each set.

Course Outcomes

See Credentials > Course Catalog. Note that for systems where the Credentials module is not installed, this catalog information is managed via Administration > System Configuration > Courses. Each course is then mapped to the relevant program(s). See Programs > Control Panel > Manage Programs > [*Program*] > Courses.

5.7.5 Portal and Templates

Email Message

Portal users assigned to programs can be notified by email. The settings function will let you define the default email message.
Use the variables defined between <% %> to include this information in the body of the email. If you are including a specific sender email address, make sure that this will not be blocked by your institution's firewall.

Send Email

You can send an email to some or all program assignees.
Use the variables defined between <% %> to include this information in the body of the email

Report Templates

The format of a program report can be configured to provide a customized 'look-and-feel' using a template.

You can assign the **Website** or **PDF** template to be used for all programs by using the **Edit** link and setting the template as **Active**.

Website templates have a *.xtm* extension. PDF templates have a *.xtf* extension. Both can be provided by Concord as a professional service or customer developed.

***Note**: Template development requires knowledge of HTML and XSL. A design guideline document is available from Concord on request.*

To Upload a Plan Template

1. Click the Website or PDF **Template Upload** link
2. **Browse** for a template file

3. **Edit** the template name as appropriate
4. Click **Submit**

The template name may be changed later if required by using the **Edit** link.

To remove a template from the system use the **Delete** link. If the template is already assigned to a standard, it will be replaced by the system default website template.

If the template supports image graphics such as a banner, these may changed using the **Image** link. Use the **Replace** function to upload a new JPEG image file which must have a .jpg extension.

Note: *The new image may be of any dimension, but care should be taken that the size is consistent with its position and appearance on the page when the report is rendered.*

5.7.6 Program Groups

Programs can be associated with a group, making it easier to organize and navigate program lists, for example into academic and non-academic programs.
A program can be linked to a subgroup via the Control Panel > Manage Programs > Edit function.

These groups and subgroups will appear when the Group view option is chosen by a user after selecting the main Programs tab.

5.7.7 Program Rubrics

Program Rubrics can be created on-screen or imported using an Excel® spreadsheet.

Note: These rubrics apply at the Program Level and provide a means for assessors, peers and program coordinators to each score the quality of an assessment report. If the Assessment module is installed, rubrics can be defined and scored at the outcome level.

To Create a Program Rubric Manually

1. Click the **Create** rubric link
2. Enter a **Name** and **Description** for the rubric
3. Optionally change the Row (criterion) **label**
4. Enter the number of **Criteria** (Rows)
5. Optionally change the Column (level) **label**
6. Enter the number of **Levels** (columns)
7. Click **Submit**
8. An empty rubric with the selected number rows and columns will open
9. Click on a column or row label to edit the information and add an optional weight
10. Click on a **cell** to edit the rubric
11. Click the **Close** link to finish *(you will be able to return by clicking the **View** link in the list of rubrics)*

To Create a Rubric using MS Excel®

1. Add the text you want to appear as **Levels** in cells A2, A3, A4 and so on. Optionally include a weight in square brackets [ ] at the end of the text. If no weight is included, a value of 1 is assumed.
2. Add the text you want to appear as **Criteria** in cells B1, C1, D1 and so on. Optionally include a

weight in square brackets [ ] at the end of the text. If no weight is included, a value of 1 is assumed.

3. Add the text you want to appear as the rubric in the appropriate cells, e.g. B2, C2 and so on.
4. **Save** the file, e.g. myRubric.xls, to a folder on your workstation.

Example

	A	B	C	D	E
1	Core Objective Aspects	Exceeds Expectations [4]	Meets Expectations [3]	Below Expectations [2]	Unacceptable [1]
2	Context and purpose	Exceptionally effective content for purpose, occasion, audience, and assignment; exceptional audience adaptation	Adequate content, appropriate and effective for purpose, occasion, audience, and assignment; some audience adaptation evident	Content was inappropriate for the purpose, occasion, audience, and assignment; minimal adaptation to the audience	Failed to meet assignment purpose; no adaptation for occasion/audience (language, knowledge, experience, culture)
3	Organization	Exceptionally clear organizational pattern; easily followed	Mostly organized and logical organization; logical progression of ideas; some unity of thought	Organization is lacking, information is rambling; does not follow assignment structure; lack of unity in thought	No evident structure; repetitive ideas; impossible to follow
4	Central message	Exceptional use of information/details/ research/examples that support the central idea and main points	Some clarifying information/details/research/examples which support the central idea and main points	Lacks information/ details/research/ examples to support central ideas and main points	No details provided; information/details/ research/examples fail to support the central idea and main points
5	Written, visual, and/or oral communication skills	Information is conveyed in a clear, appropriate, logical, and easy-to-follow manner. Correct diction, grammar, and format are used throughout	Information is conveyed in a clear, appropriate manner. Diction, grammar, and format are mostly correct	Information is conveyed in a manner that is somewhat unclear and difficult to follow. Diction, grammar, and format are often incorrect and/or inconsistent	Information is conveyed in an unclear, inappropriate manner that is difficult to follow. Diction, grammar, and format are overall incorrect
6	Quality of sources	Appropriate, credible sources of information are used. Sources are correctly cited	Appropriate sources of information are used. Sources are correctly cited	Most informational sources are not appropriate or reliable. Sources are partially or incorrectly cited	Informational sources may not have been used or may be inappropriate. Sources are incorrectly cited or not cited at all
7					

When you are ready to deploy a rubric, click the **Edit** link in the list of rubrics and check the **Available** parameter.
You can also control how are rubric can be used and reported by an assessor and peer reviewer.
To assign a program rubric see Settings > Rubrics

5.7.8 Program Settings

Options

Check the parameter to allow the re-labeling of fields in the assessment view. (This function is not available to portal users).

Program Detail

Additional information can be added to each program, for example to include information such as program start and end dates.
Specify the relevant field type. If the field type is **Selection**, use the Parameters link to define the available drop-down selections.

Once the fields are created, you can add the relevant information to each program by using the Manage Programs > [Program] > Settings > Extended detail function.

Rubrics

You can specify the Rubric to be used for program-level assessment, depending on the Type of program. For each program type, choose the rubric to be assigned from the available list. Use the **View Selection** link to view a selected rubric.

5.7.9 Program Time Track

Program assessments are managed in cycles which follow a specified time track. A time track must be defined with a cycle length and initial start date.

Each program will follow the assigned time track and the system will automatically open and close fields as they move from **Next** to **Current** or **Current** to **Prior** cycles. A new cycle is generated by the system automatically when it is required.

Before any program can be started, the time track must exist.

To Create a Time Track

1. Click the **Create a Track** link
2. Enter a **Name** for the track
3. Specify the **Cycle Length**, e.g. 1 Year
4. Select the **Initial Start Date**
5. Click **Submit**

The cycle length and initial start date parameters are used by the system to determine when each cycle will start and end. For example, if you specify a cycle length of 1 year with an initial start date of July 1 2013, the system will determine that the initial cycle will close on June 30, 2014 and the subsequent cycle will then start July 1, 2014 and so on. Note that cycles are contiguous, so a 6 month cycle length with an initial start date of July 1, 2013 will close on December 31, 2013 with the subsequent cycle starting on January 1, 2014 and closing on June 30, 2014.

To add cycles for earlier time periods, simply set the initial start date with an earlier year, e.g. July 1, 2012.

Caution!
Once the time track has been created, you will not be able to change the cycle length or initial start date. Contact Xitracs Support by opening a trouble ticket if you think you have created a time track with wrong parameters.

Click the **Cycles** link to view a list of the cycles that exist for the track.

The **Grace period** link lets you enter a length of time fields will remain open to the assigned assessor(s) after a cycle as ended.

If you need an additional time track, for example because the timeframe for non-academic programs is different, contact Xitracs support to have this enabled.

5.7.10 Program Types

You can categorize programs into types, e.g. Undergraduate, Graduate. These types can then be used as filters in Programs > Reports.
The program type can also be used to determine which rubric will be assigned.

6 Xitracs Standards™

6.1 Overview

The **Xitracs Standards™** module provides you with all the tools you need to prepare, manage and publish an agency compliance report.

Click on the **Agencies** tab to go to a list of agency standards available to you. The availability is determined by your membership of one or more teams.
If your standards list is empty or a particular standard is not listed, it is typically due to either: (1) you are not a member of any team or (2) you are a member of a team, but the team has not been assigned to any sections of the standard or (3) the standard has been set to **Offline**.
See the Teams function for further information about how to assign team members and Properties about how to set the status of a standard.

The list consists of **Active Standards** and optionally **Retrieved Standards** (see below) and will look similar to the following:

Title	Description	Version	Status	Function
AACSB-BUS	AACSB Standards for Business Accreditation	2009 Edition	Online	Edit Evidence Other Preview Publish Teams
CCNE	Commission on Collegiate Nursing Education	2011 Edition	Response (1)	Edit Evidence Other Preview Publish Teams
SACS	Southern Association of Colleges & Schools	2011 Edition	Online	Edit Evidence Other Preview Publish Teams

These are retrieved standards. They may be viewed but cannnot be edited.

Title	Description	Version	Status	Function
SACS	Southern Association of Colleges & Schools *Backup date: 9/11/09 2:20 PM* *Retrieved on: 9/11/09 2:20 PM*	2008 Edition	View only	View

The **Title** and **Description** identify the accrediting agency that has published the standard.

The **Version** is the particular version of a standard as published by the respective agency.

The **Status** indicates the current state of the standard. This is managed via Control Panel > Manage Standards > Properties.

- Online - the standard is available for editing by assigned team members
- Response - the standard is in response mode. Only reports or responses may be added or edited and original narratives and evidence are locked. The number in parenthesis indicates the response cycle.
- Locked - the standard can be viewed by assigned team members but cannot be edited. If the standard is locked while in a response cycle, the number of the cycle will appear in parenthesis.

The **Function** column contains a number of links which will take the user to an operation in the Xitracs system. Availability of these links is determined by the type of team that you belong to for a specific standard. See the next section to understand how these functions work.

The list of standards may also include **Retrieved Standards**. These are standards that have previously been backed up by the System Administrator and are no longer active. You can only view a retrieved standard and it cannot be edited. The purpose of the retrieved standards list is to allow users to view a prior instance of a standards template, for example, to view or copy information.

6.2 Agencies

6.2.1 Editing a Standard

In the **Edit** mode, the Agency Template is available to add or edit narratives and evidence for each section and update the section status.

For consistency with most agency standards and to simplify navigation, the template is generally built with active headings that allow the user to drill-down into a particular section.

You can search for a narrative or requirement by keyword. If you have a manager role, all matching sections will be returned. For other team members, only matching rows assigned to your team are returned.

Standard		
SECTION 1	THE PRINCIPLE OF INTEGRITY	More detail
SECTION 2	CORE REQUIREMENTS	More detail
SECTION 3	COMPREHENSIVE STANDARDS	More detail
SECTION 4	FEDERAL REQUIREMENTS	More detail

Certain sections may include a **More Detail** link, providing access to additional descriptive information published by the accreditation agency.

Clicking on a heading will open the sections under the heading, for example:

Standard		Resources				Status		
CORE REQUIREMENTS		Log	Information			Due	Preparation	Judgement
2.1	The institution has degree-granting authority from the appropriate government agency or agencies. (Degree-granting Authority)					8/23/11	Draft	Compliance
2.2	The institution has a governing board of at least five members that is the legal body with specific authority over the institution. The board is an active policy-making body for the institution and is ultimately responsible for ensuring that the financial resources of the institution are adequate to provide a sound educational program. The board is not controlled by a minority of board members or by organizations or interests separate from it. Both the presiding officer of the board and a majority of other voting members of the board are free of any contractual, employment or personal or familial financial interest in the institution. (Governing Board) More detail					8/23/11	For Review	Compliance
2.3	The institution has a chief executive officer whose primary responsibility is to the institution and who is not the presiding officer of the board. (Chief Executive Officer) More detail					4/11/11	Draft	Compliance
2.4	The institution has a clearly defined, comprehensive, and published mission statement that is specific to the institution and appropriate for higher education. The mission addresses teaching and learning and, where applicable, research and public service. (Institutional Mission)	-		-	-	10/19/10	Draft	Compliance

In the above example, the **Resources** icons for Log, Narrative and Evidence are displayed for all sections except for section 2.4, which is grayed out. This is because the user is not a member of any team assigned to section 2.4. Provided the section is not also designated as confidential (see below), members of other teams will be able to view the narrative and evidence but will not be able to edit them.

If the Xitracs Portal™ is installed, the assignment of one or more Portal Users will be indicated.
If a section already contains evidence items, the evidence icon will turn green . Rolling over the icon with your mouse will display the number of items.

You can set a Due Date and Status for a section depending on your role in the system and team membership. If no date or status has previously been set and you are able to change the setting, a yellow square will display.

If a **Confidential** icon appears next to the description (as in section 2.4 above), this indicates that this section is restricted and the narrative and evidence are not viewable or editable by users who are not members of the assigned team. Also any evidence will not be available for reuse in other sections. Confidential sections can also be excluded when previewing or publishing a submission.

If the standard is in **Response** mode, an additional column will display. See Response Cycles for further information.

6.2.1.1 Log

Each time a user edits a section of the standard, the action is recorded automatically by the system. The last action is visible by placing the mouse cursor over the icon.

1. Click on the icon to see all actions for the section
2. A comment may be added manually by a user by clicking on the **Post Comment** link
3. If an unread comment exists, the log icon will change to include a flag . See the Narrative function for more detail regarding comments.

In the log view you can also see which teams are assigned to a section and the team members.

The log is an integral part of the standard and is saved whenever a standard is archived. It is not included as part of the published submission.

6.2.1.2 Portal User Input

If your system is configured with the Xitracs Portal™, users with access to the portal can be assigned to provide input to one or more sections of a compliance report.

If there are no portal users assigned, an icon with a red bar will appear. Click on the portal user icon to add one or more icon users to the selected row.
The portal icon will display once portal users are assigned and will turn green if there is input available. Click on the icon to view the input which can then be copied into the narrative and evidence as appropriate.

The Notify via email link will generate an email to the relevant portal users advising them of the assignment.
Note: Portal users are managed separately from Xitracs users. See Xitracs Portal for more information.

6.2.1.3 Narrative

The narrative for a section of a standard may be created or edited by clicking the icon in the **Edit** view.
If there is no icon present it means that you are not a member of the team that has been assigned to a confidential section.

If the section has a status of **Complete**, you will not be able to edit the narrative.
When you start to edit a narrative, it will lock the editor for other users. Similarly, if the narrative is already being edited by another user it will be locked. If you have a Manager role you will be able to unlock the narrative. This is useful if the other user has accidentally left the narrative open.

To add new or update existing narrative click the **Edit narrative** link. This will open the **Text Editor** and will also lock the narrative so no other users can edit it.
If the **Edit** link is not available, you are: (1) not assigned to a team for this section *or* (2) the narrative may be open for editing by another user and has been locked *or* (3) the manager has marked the section as complete and it can no longer be updated.

Use the text editor to enter new and/or edit the narrative and apply formatting, add images and hyperlinks. For more information see Using the Text Editor.

*After you add or edit narrative, do not forget to click the **Submit** button or else your changes will not be saved. This will also unlock the narrative for other users.*

To view any previous versions of a narrative, click on the **View History** link. You can track changes by clicking on the **Compare** link next to an earlier version. Use the **Copy as new version** link to make a previous version the current narrative.

The **Text Cleanup Tools** link lets you access a number of tools that will help you resolve any formatting or bad hyperlink problems that are typically caused by copying and pasting text from an external source document.
Click on the link, select the options required and click Submit. The tools will perform the selected functions plus the automatic built-in cleanup. A new version of the narrative with the cleanup changes will then be generated.

When a standard is in **Response** mode, the narrative and evidence for the original submission or any prior response cycles can no longer be edited. Instead you will be able to input any post-submission review comments received from the relevant agency and enter responses for the current cycle. See Response

Cycles for further information.

If the section has the **Include in Response** flag set in the Response status, the narrative icon will change to include a red dot , the section will be highlighted and will be included in the response submission.

To add/edit a report or response click the **Edit report** or **Edit response** link. Use the text editor in the same manner as for the narrative.

Information copied and pasted from other sources may contain proprietary formatting characters or invalid links. This may cause problems later when publishing a submission. If an invalid link problem is detected, a warning message will be displayed. You can check the quality at any time by using the ***Website Preview*** *function and a pop-up window will open with the relevant section displayed.*

If there is a **new comment** that you have not read, a NEW icon will appear.
To add or show comments click the relevant link. When viewing comments, click the **Show all comments** link to display more than the most recent. Click on **Hide comments** to close the display.

Note: Comments are not included in the published submission and are not visible to external reviewers.

If the section has been assigned to one or more portal users, a Portal responses link will appear. If there are any pending responses, an asterisk will also appear.

6.2.1.4 Evidence

The evidence for a section may be created or edited by clicking the icon in the **Edit** view.
If the section already contains evidence items, the icon will change to green . Rolling over the icon with the mouse will display the number of items.

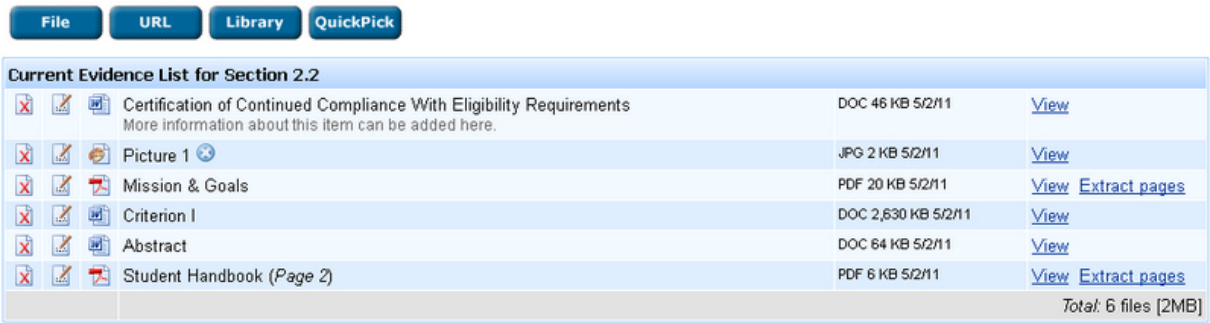
Evidence items are displayed either in alphabetical order or in a specified order. This is configurable. See Manage Standards > [Standard] > Properties

Some agencies include information about the evidence required for certain sections. If this information is provided an **Evidence checklist** link will appear next to the section number. Click on the link to view this information.

Evidence consists of files or Uniform Resource Locators (URL's) that are added to the section of a standard as supporting artifacts.
Items may be added in a number of ways:

1. From File on a local resource, e.g. your workstation's hard drive
2. By entering a URL
3. From the Xitracs Library
4. From the standard's current All Evidence list using the QuickPick function

The evidence page for the specific section will list any items currently being used, in an editable order, together with buttons to add new items.
If the section has a status of **Complete** or the standard is **Locked**, the edit buttons will not appear.
If the section is set as **Confidential**, you will have the option to designate individual items as confidential. These items are highlighted by the icon.
If the standard is in **Response mode**, the cycle information will appear. See Response Cycles for further information.



***Note**: If an item has been linked in the narrative, the delete icon will be replaced by . Click on the icon to view the links.*

To Add a File

1. Click the **File** button
2. Enter an item **Title**
3. If the file is a **PDF** you will have the option to enter a page number where the document will open when viewed.
4. Enter an optional **Description**

5. If you are in a confidential section, an option to designate the item as **Confidential** will be available.
6. Locate the file to upload using the **Browse** button
7. Click **Submit**

Depending on the size of file, there will be a brief delay during the upload process after which a receipt page will display confirming the file has been added to the evidence list.

***Note**: Files with extensions .exe .bat .java .jsp .js will be rejected*

To Add a URL

1. Click the **URL** button
2. Enter an item **Title**
3. Enter an optional **Description**
4. Enter the **URL**
5. Click **Submit**

⚠ *Take care when adding URLs as evidence. Most agencies require that evidence items are integral to the published submission. While a URL link to a general site, such as the institution website, would be acceptable, URL links to documents on a remote server may not be.*

To Add an Item from the Library

1. Click the **Library** button
2. Search through the **folders** to locate the item
3. Click the **check box** next to the item(s) to be added
4. Click **Submit**
5. If the file is a **PDF** you will have the option to enter a page number where the document will open when viewed.
6. Enter an optional **Description**
7. Click **Submit**

   Note: When an item is selected from the library, it is copied into the evidence list for the standard. If the original item in the library is later edited or deleted, it will not affect the copy of the item in the standard. This is important to maintaining the integrity of a published submission.

If a file is a multi-page PDF, an **Extract pages** link will appear. Click on the link to select one or multiple contiguous pages and create a new evidence item.

To Add an Item from the Existing Evidence List

The QuickPick function allows the user to select one or more items that have already been used as evidence elsewhere in the standard. This avoids having multiple copies of the same item when it is used in multiple sections throughout the standard. For example, if a Policy Document is to be used as evidence in Sections 2.1, 3.4 and 4.2, it need only be uploaded or copied from the Library once into Section 2.1; from then on the user can use the QuickPick function to link the same item to Sections 3.4 and 4.2.

1. Click the **QuickPick** button
2. *If the section containing the desired item is known*, choose the section number using the **drop-down selector** to display evidence items in use for that section of the standard. Note that only sections containing evidence are displayed. Sections that have a setting of **Confidential** are not listed.

3. *Alternatively*, click the **List all** link to display all evidence items used all sections.
4. Click the **checkbox** next to the item(s) to be added to the target section
5. Click **Submit**

   Note: Items added using the QuickPick function are linked and not copied. This means that if the item in the All Evidence list is edited or deleted, it will affect all instances of the item in the standard. This is particularly useful where a correction needs to be made to an evidence item. It need only be edited once in the Evidence List and all instances will automatically be updated.

To Edit an Item in the Section Evidence List

1. Click the **Edit** icon
2. If the file is a **PDF** you will have the option to enter a page number where the document will open when viewed.
3. Edit the item **Description** as appropriate
4. Change the **Sort Position** as appropriate (this is the position where the item will appear in the list if the properties are set to specific sort.)
5. Select **Exclude** from evidence list as appropriate (see below)
6. Click **Submit**

   Note: To edit the Title of an existing item, you must first view the item in the main Evidence list for the standard, then click Edit. Only users with a Manager role are able to view items from confidential sections in the main evidence list.

To Exclude an Item in the Section Evidence List

Items that have been added as evidence for a section may optionally be excluded from the evidence list by checking the **Exclude** box in the **Item Edit** mode. This is useful when certain items have been added solely for use as graphics in a section narrative. Excluded items are highlighted by the icon.

To Delete an Item from the Section Evidence List

1. Click the **Delete** icon
2. Click **Yes** to confirm

If you attempt to delete an evidence item that is linked in the narrative you will receive a message that you must first remove or change the link in the narrative.

Note: Deleting an item from a section evidence list will remove it from that section only. If it is being used elsewhere, in other sections of the standard, it will continue to appear on the All Sections Evidence List.

6.2.1.5 Due Date

A date can be set by users who are members of a **Manage Team** to indicate when a particular section is due.
The date is a visible aid to team members and is also used in the generation of the Due Date Report.

Due dates will appear on the team member's Calendar and will optionally generate email alerts, if configured.

The **Set Date** function is available to users who are members of the Manage Team.

- To set the date, click on the calendar icon, select a date from the pop-up and click **Submit**.
- To edit an existing date, click on the date, select a new date and click **Submit**.
- To clear an existing date, click on the date and click **Clear**.

6.2.1.6 Status

A status is used to indicate progress through the submission process. A standards matrix has two status columns when in normal online mode and a third status column when in response mode. The absence of a status is indicated by the symbol (if editable) or "-".

A list of the default statuses is shown below. Note that the Response column only appears if the standard is in Response mode.

Preparation	Judgment	Response
Draft	Compliance	OK
For Review	Partial Compliance	Information
Resubmit	Non Compliance	Problem
Approved		
Complete		☐ Include in Response
☐ Add comment	☐ Add comment	☐ Add report

The ability to set a status is controlled by a user's Team Membership *for a specific standard section*, as follows:

The **Preparation** column indicates the status of preparation of each section.

- Users who are members of an **Action Team** can set a status of **Draft** or **For Review**
- Users who are members of a **Review Team** can set a status of **Resubmit** or **Approved**
- Users who are members of a **Manage Team** can set any available status, including **Complete**

Note: Sections that have been mapped from another standard will display a status setting of **Auto**.

The Judgment column indicates the status to be included in the submission.

- Users who are members of a **Manage Team** can set any available status

Note: If the relevant agency calls for the inclusion of the Compliance status, this will automatically be included with the published submission.

If the standard is in Response mode (see Response Cycles) the following additional options are available:

The **Response** column indicates the status of the review response from the relevant accreditation agency.

- Users who are members of a **Manage Team** can set any available status.
- The **Include in Response** checkbox indicates that the section is to be included in a published response. When checked, the Narrative icon will include a red dot and the background color of the row will change.
- The **Add Report** option will take the user to a text entry area where report information from the relevant agency may be entered.

To set a status:

1. Click the icon or the existing status link
2. In the pop-up, select an available status
3. Optionally check the box to post a Comment (Except Response column)
4. Optionally check the box to set the Response flag and add a Report (Response column only)
5. Click Submit

Note: An inactive link indicates that the user does not have the privilege to edit the status. See team membership.

To clear a status:

1. Click the Clear button in the status pop-up

Note: This function is only available to Manage team members

6.2.2 Evidence

When an evidence item is added to a section, it appears on the **All Evidence List**.
This list shows all items (or by letter if mode selected), in alphabetical order of title, with the exception of items used only in sections designated as Confidential. These items are only visible to users with a Manager role.
You can verify URL evidence items at any time by clicking on the **Check URLs** link.

In the left column there is a series of icons which provide information and allow you to manage items.

1. Click on the icon to **Delete** an item. You will be asked to confirm the action.

   Once an item is deleted it is removed from all sections where it is being used.

   To remove an item from only one section, use the Edit evidence link in the relevant section.
2. Click on the icon to **Edit** the item title and other optional settings.
3. Hold your mouse over the icon to see **Where Used** information for the item. A list of section numbers will be displayed.
4. Click on the icon to **Replace** the item. (Not available for URL items - Use the **Edit** function to change a URL).

In the middle column, the item **Title** is shown. This can be changed using the **Edit** function (see above). If an icon appears next to the title, it indicates the following:

The item has been designated as **Confidential**.

See Editing a Standard > Evidence for more information about confidential items and how to change this designation.

The item has been designated as **Restricted**.

Items with this designation will be included in the restricted documents folder when a website submission is published. This feature allows and additional level of access security to be maintained for these items. To change click on the Edit icon. Note: The restricted designation does not apply to published submissions in a PDF or MS Word® format.

The item has been designated as **Excluded**.

Items with this designation will be excluded from the evidence lists (section level and all evidence). Use this function for items such as embedded graphics. To change click on the Edit icon.

In the right column, there is a link to **View** the item and information about the **Type**. If the item is a file, the File Extension is shown, together with the file size in kilobytes (KB) and the date that the file was created.

Note: Descriptive information does not appear in the evidence list. This is because this optional descriptive information relates only to the instance of an item in a section. For example, the same item could have Description A in one section and Description B in another section, and so on.

Use the **Check duplicate files** link to list any files which have been added more than once. You can then merge selected files to remove duplication.

⚠ *Note: If a list of duplicate files contains both confidential and non-confidential items, merging them will result in the file being designated as non-confidential. This is because the item has already been referenced in non-confidential sections of the report.*

6.2.3 Other Collateral

Other collateral items, such as a Quality Assurance Plan (QEP), may be linked to a published website submission if desired.

They are viewable by clicking on the relevant tab in the published submission website.

To enable Other Collateral linking see the Control Panel > Manage Standards > [Standard] > Properties function. This function also includes the Single or Multiple item setting.

If configured with a Single Collateral Item link

The recommended file format is PDF, although other formats may be uploaded if preferred.

To Associate an Item with a Standard

1. Click the **Other** function link
2. Click the **Add new** link
3. **Browse** for the file to upload (PDF format recommended)
4. Edit the **Title** as appropriate
5. Click **Submit**

Once a Plan has been uploaded, it may be replaced or deleted at any time.

To Replace a Collateral Item

1. Click the **Other** function link
2. Click the **Replace** link
3. **Browse** for the new (replacement) file to upload (PDF format recommended)
4. Edit the **Title** as appropriate
5. Click Submit

To Delete a Collateral Item

1. Click the **Other** function link
2. Click the **Delete** link
3. Click **Yes** to confirm or **No** to cancel

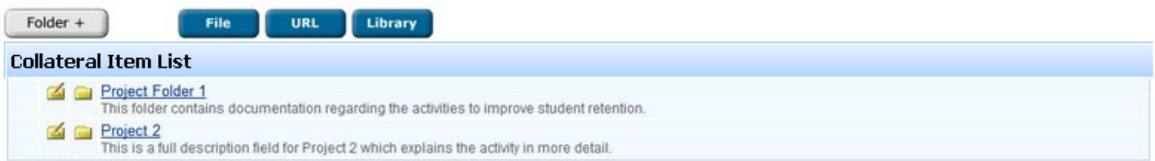
If configured with a Multiple Collateral Items link

Unlike a single item association, the **multiple** items function allows you to create a structure of folders and items.
These items can be included as part of the published website submission and can be viewed by clicking the relevant (e.g. Other Items) tab.

To Create a Folder

1. Click the **Folder+** button
2. **Name** the folder and add an optional description
3. Click **Submit**

Note: You can add sub-folders by first clicking on the parent folder and the clicking the Folder+ button.



To Edit a Folder

1. Click the **Edit** folder icon
2. **Edit** the folder name and/or description
3. Click **Submit**

To Delete a Folder

1. Click the **Delete** icon next to the folder
2. Click **Yes** to confirm

Note: The delete icon will only appear for empty folders.

To Add Items to a Folder

1. Click the **Folder** into which you wish to add items
2. Click the **File**, **URL** or **Library** button depending on the source
3. Add or edit the **Title** as appropriate
4. Add an optional **description**
5. Click **Submit**

Note: If you do not select a folder, the items will be added at the same level as the existing list of folders.

To Delete an Item

1. Click the **Delete** icon next to the item
2. Click **Yes** to confirm

6.2.4 Preview

The Preview function allows you to view how submission will look, without having to publish it. No evidence files are copied and are available for viewing only. You must have a Manager or Administrator role to have access to this function.
If the standard has been configured to allow partial publishing, a list of the top level sections to be included will be displayed. See standard Properties for more details. (This option is not available if the standard is in Response mode.)
If the standard is in Response Mode, only sections with "Include in Response" set to Yes will be included. See Response Cycles for further information.

A panel on the right of the page provides a summary report of the number and size of evidence items.

To Preview a Submission

1. Click the **Preview** link.
2. Select whether **Narratives** and/or **Evidence** are to be included in the preview.
3. Select whether **Confidential Sections** are to be included in the preview.
4. Select the **Format** for the preview submission. The default is a website view.
5. If the format is **Website**, optionally check the box to include a narrative search function on the webpage.
6. Alternatively, select a **Web page** (continuous single page), Portable Document Format (**PDF**) or Microsoft Word (**MS Word®**) document.
7. If the standard is configured to allow **Partial publishing**, select the sections to be included.
8. Click **Submit.** Depending on the size of the submission, the preview may take a few moments to generate.

Note: Previews in Website or Web page format cannot be saved and will reset when the browser window is closed.

6.2.5 Publish

The Publish function will generate a submission in a selected format, which can then be used for one or more of a **Printed Copy**, **Website** or **Electronic Media** such as CD, DVD or USB Flash drive. When a standard is published, all of the narrative and evidence (if selected) are copied as part of the submission file. Therefore, any subsequent changes made to the standard using the Edit function will have no affect on a previously published submission, until the standard is re-published.
You must have a Manager or Administrator role to have access to this function.
To see how a submission will look prior to publication, use the Preview function.
If the standard has been configured to allow partial publishing, a list of the top level sections to be included will be displayed. See standard Properties for more details. (This option is not available if the standard is in Response mode.)
If the standard is in Response Mode, only sections with "Include in Response" set to Yes will be included. See Response Cycles for further information.
A panel on the right of the page provides a summary report of the number and size of evidence items.

To Publish a Standard

1. Click the **Publish** link.
2. Select whether **Narratives** and/or **Evidence** are to be included in the publication.
3. Select whether **Confidential Sections** are to be included in the publication.
4. Select the **Format**
5. If the format is **Website** the submission may be published to a website location (if defined) or downloaded as a compressed (.zip) file. Check the box to include a narrative search function on the website, if required.

   Note: Website locations must be predefined. See Control Panel > Manage Standards > [Standard] > Website > Locations
6. Alternatively, select a **Web page** (continuous single page), Portable Document Format (**PDF**), Microsoft Word (**MS Word®**) document or **ePub** file format.
7. If the standard is configured to allow **Partial publishing**, select the sections to be included.
8. Click **Submit.** Depending on the size of the submission, it may take a few minutes to generate.

If you have published the submission as a downloaded compressed .zip file, you can copy the contents to a CD/DVD or USB Flash Drive as follows:

1. Unzip the file to an empty directory folder (e.g. Submission) on your workstation using your local utility (e.g. Winzip).
2. Copy the **contents** of the folder containing the unzipped files to the CD/DVD or Flash Drive. Do not copy the folder itself.

You can verify this after the copy is complete by checking the media and making sure that the index.html file is in the root.

The system will also include the autorun.inf file which will cause the index file to open automatically when the media is inserted, unless the security settings on the viewer's workstation preclude execution of autorun files.

6.2.6 Response Cycles

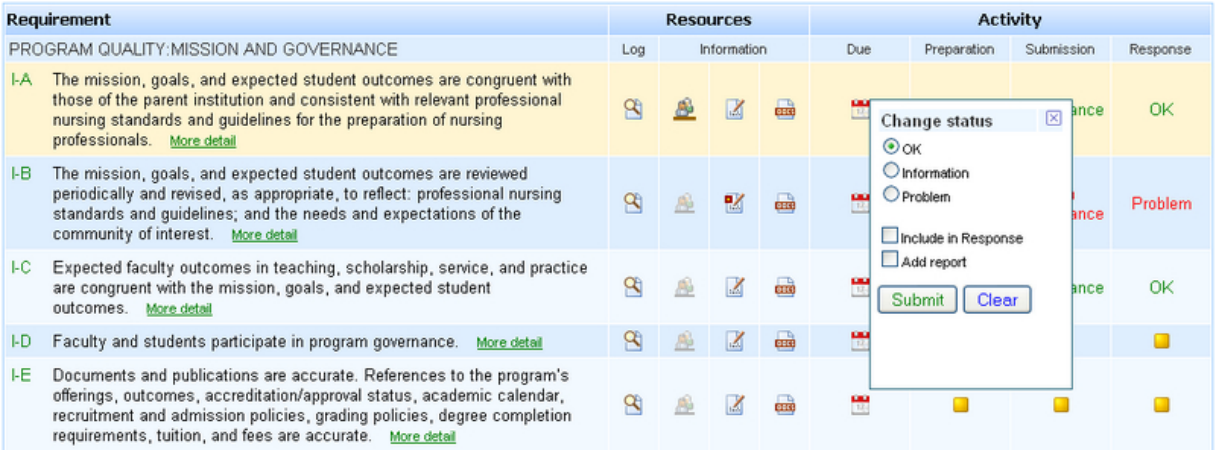
Following final publication of a submission and if it is necessary to create responses to an agency review (e.g. a Focused Report), the properties of a standard may be changed to **Response mode**.
This function is available via the Control Panel > Manage Standards > Properties function.

Once in this mode the original submission will be locked and the standard will enter Response Cycle 1. Reports (comments from an agency review) and Responses (to comments) may be entered for relevant sections of the standard and these may then be published as a response submission. If it is necessary to generate subsequent responses to an agency review of the response submission, the standard can be set to response Cycle 2 and so on.

Once a standard is in Response mode, it cannot be returned to Online mode. Make sure you backup the standard before changing the mode to Response.

Standards that are in Response mode have a third status column which allows users with a Manager role to set a section response status.

Check the **Include in Response** box if you want to include the section in a response submission. The relevant section will be highlighted and the narrative icon will change to include a red marker . If you check the **Add Report** box before you click Submit the system will automatically take you to a page where you can enter agency comments and your response.



When you click on the **Narrative** and **Evidence** icons you can add Reports (Agency comments) and **Responses** (Response to agency comments), plus supporting evidence. The Cycle you are in is displayed. If there are any previous response cycles, you can view these and the original submission narrative and evidence by clicking the **View Cycles** link.

You can only edit the cycle you are in. Information for the original submission and any previous response cycles can be viewed but not changed.

Once a response submission is complete, the next cycle can be started if necessary via the Control Panel > Manage Standards > Properties function.

6.2.7 Teams

Users are assigned to a standards matrix through membership of a **Team**.
There are three types of teams: **Action**, **Review** and **Manage**. The team type controls which functions in the Xitracs system are available to users.
There can be multiple Action and Review teams, but there is only one **Manage Team** for the entire standard; users who are members of the Manage Team can edit or update the status of all sections.

To have access to a complete set of manage functions, members of a Manage team must also have a user role of Manager.

Functions available ▾ Team type ▸	Action	Review	Manage
• Set Preparation Status *(assigned sections only)*	x	x	x
• Set Compliance Status *(all sections)*			x
• Set Response Status *(all sections)*			x
• Set Due Date *(all sections)*			x
• Add/Edit Narrative *(assigned sections only)*	x	x	x
• Add/Edit Evidence *(assigned sections only)*	x	x	x
• Post Comments *(assigned sections only)*	x	x	x
• Add/Edit Reports* *(assigned sections only)*	x	x	x
• Add/Edit Responses* *(assigned sections only)*	x	x	x
• Manage Teams			x
• Add/Edit Preamble *(via Control Panel > Settings)*			x
• Add/Edit Other Collateral			x
• Preview Submission			x
• Publish Submission			x
• View Reports			x
• Access Library**	x	x	x
• Post to Discussions	x	x	x

** When standard is in Response mode.* ***If library assigned. See Administration > Groups.*

Note: Preparation Status selections will differ depending on team type. See the Status section for more information.

There is one team of each type created automatically when an agency standard is first imported; these are the default teams and they cannot be edited or deleted. Additional Action or Review teams can be created as required, then edited or later deleted as appropriate. Creating additional teams is optional, however, it provides a greater level of granularity in assigning users to standards. For example, the preparation and review certain sections of a submission may relate to a specific department in the organization, say the Finance Department. By creating Finance Action and Review Teams, the relevant sections can be assigned only to the members of those teams, (see *Manage Team Access* below).
Users who are members of other Action or Review teams can view *(unless the confidential designation is set - see below*), but will not be able to edit these sections or update the statuses.

A user must belong to an assigned team in order to have access to a standard. If a user belongs to a team that has not been assigned to one or more sections, the standard will not appear in the user's standards list.

To Create a New Team

1. Click the **Create** a new team link
2. Enter a team **Name**
3. Enter a team **Description**
4. Select the team **Type**, either **Action** or **Review**
5. Click **Submit**

To Add Team Members

1. Click the **Members** link
2. Click the **Add** member link
3. Enter a **User ID**, **Last Name** or **First Name** to find the user (partial entry allowed)
4. Click **Submit**
5. Matched user(s) will be listed
6. **Check** the box next to the relevant user
7. Click **Submit**

To List Team Members

1. Click the **List or Remove members** link

To Remove Team Members

1. Click the **List or Remove members** link
2. **Check** the box next to the relevant user(s)
3. Click **Submit**

To Manage Team Access to Sections of the Standard

1. Click on the **Manage team assignment** link
2. In the matrix, click on an **Action Team** or **Review Team** cell
3. **Select a team** from the pop-up

*Note: You must first have created additional teams for them to appear in the pop-up. See **Create a New Team** above.*

A section may be set as **Confidential**. This action will:

a. Prevent members of other teams from viewing the narrative and evidence.

b. Exclude any associated evidence from the main evidence list except for users with a Manager role.

c. Exclude the section from a previewed or published submission unless explicitly included.

Note: You cannot assign the default Action or Review teams to a confidential section.

To Manage Confidential Sections

1. Click on the **Manage team assignment** link
2. In the matrix, click on a **Confidential** cell
3. Select **Yes** or **No** from the pop-up

6.3 Projects

6.3.1 Projects

The Projects feature is a useful tool for assigning and tracking tasks; projects may optionally be linked to an installed Agency Standard. For example, there are many activities that are related to the preparation and submission of a compliance report that may need to be tracked, such as team assignment or review meetings. The creation of a project is a Control Panel function, as is the management of **Project Types** and **Task Types**. Once a project has been created, members may be added to the project using the **Team** function.

A project team consists of users with either a Project Team Member or Project Manager role. Users with a Project Manager role may add or remove other team members and may also manage tasks.
Task completion status and linked agency standard progress (where applicable) are displayed graphically.

To Manage Team Members *(available to Project Manager only)*

1. Click the **Team** link
2. Click the **Members** link for the relevant team
3. **Add** or **Remove** users as appropriate

To Create a Task *(available to Project Manager only)*

1. Click the **Tasks** link
2. Click the **Create new task** link
3. Select the **Task Type** from the drop-down
4. Enter a **Name** and optional **Description** for the task
5. Select a **Start** and optional **End Date**
6. Click **Submit**

To change the details for a task, use the **Edit** link. *(available to Project Manager only)*

To Update a Task *(available to all team members)*

1. Click the **Update** link
2. Select a new **Status** from the drop-down as appropriate
3. Enter **Report** detail as appropriate
4. Click **Submit**

When a report exists for a task, a **Show** link will appear in the task list.

6.4 Reports

6.4.1 Activity Log

The Activity log lists, in descending chronological sequence, all of the user activity that has occurred for a standard in the Edit mode, including due date changes, status changes and evidence updates.

Included in the report are the **Section Reference ID** (where applicable), the **Section Description**, the **Activity**, **Date** and **Time** and the **User Name**.

The report can be grouped by date or section of the agency template. User posted comments will also appear in the activity log. To include only user comments in the report, check the box.

If the standard is in Response mode, the Cycle information will be shown.

6.4.2 Due Date

The Due Date Report lists all sections that meet a set of criteria. These can be **Past Due** and **Due within** a specified period of days.

The preparation **Status** may be filtered, as required. If the date filter of Past Due is selected, the status of **Complete** is excluded.
The report may be by due date or by section.

Note: The sections in the generated report will be in View mode. Changes to a section must be made using the Edit function.

6.4.3 Link Check

This report will check and verify the integrity of evidence links in each narrative.

Evidence items can be linked to text in a narrative. See Using the Text Editor for more about linking.
If the items have been correctly linked, the Xitracs system will automatically generate the correct URL for each link depending on the target destination of the published submission, (e.g. offline media such as a DVD or Flash Drive or a webserver).

However, if a link is suspected as being bad, it will be listed on the report with a reason.
The most common cause is text that has been copied and pasted into a narrative from another source (e.g. a Word document or another narrative) which includes a hyperlink to an item that does not exist in the evidence list for the section. Go to the narrative for the relevant section and correct the link as shown in the highlighted error.

To validate the integrity of external URLs, use the Check URL function in the all evidence list.

6.4.4 Progress

The Progress Report lists the number of sections by status and as a percentage of total sections, for the agency standard selected.

A **printer friendly** link generates a version of the report that can be sent to a local printer.

6.4.5 Word Count

Certain agencies specify the preferred or maximum number of words that may be included in a submission. The Word Count report will list by section the number of words and characters used in the narrative, plus provide a total for the whole document. Use the View link to jump directly to the relevant section and edit as appropriate.

6.5 Control Panel

6.5.1 Manage Standards

The **Manage Standards** function allows a manager with control panel access or system administrator to control which standards are available to users, plus perform a number of administrative activities.

As a first step, at least one standard must be imported into the system. One or more Agency Standard (xis) files will have been provided to you or pre-loaded by Concord, depending upon how many agency standards have been licensed.

To Import a Standard

1. Click the **Import a standard** link
2. **Browse** for the Standard import file (this will have a .XIS file extension, such as SACS-2008-01.xis)
3. Click **Submit**
4. The imported standard will be added to the active standard list.

The list of active standards will look similar to the following:

Title	Description	Version	Status		Function
AACSB-BUS	The Association to Advance Collegiate Schools of Business (Business Accreditation)	31 Jan 07	Locked	Information	Archive Backup Remove Properties Teams Settings
MSCHE	Middle States Commission on Higher Education	2006 12th Edition	Offline	Information	Archive Backup Remove Properties Teams Settings
NCATE-US	NCATE Unit Standards	2006 Edition	Offline	Information	Archive Backup Remove Properties Teams Settings
PCI	Payment Card Industry Data Security Standard	Rel 1.1 Sep 06	Online	Information	Archive Backup Remove Properties Teams Settings
SACS	Southern Association of Colleges & Schools	2008 Edition	Online	Information	Archive Backup Remove Properties Teams Settings
SACS-INT	SACS Fifth-Year Interim Report	2008 Edition	Response (2)	Information	Archive Backup Remove Properties Teams Settings

Each standard is listed with a **Title** and **Description**, plus a **Version** as published by the agency.

The **Status** of a standard determines its availability to team members. There are four possible settings:

- **Online** - the standard is available and may be edited by the assigned team members
- **Locked** - the standard is available for viewing only; it cannot be edited by the assigned team members
- **Response** - the standard is in response mode; the original submission can no longer be edited. The cycle number is shown in parenthesis.
- **Offline** - the standard is not available; it will not appear on the assigned team members list of standards

See the Properties section for more information about how to set a status.

See the Backup & Archive section for information regarding these functions.

An active standard may be removed from the list by using the **Remove** link, provided that it has a status of **Offline**.

⚠ *Removing an active standard is irrevocable and will delete all associated narratives and evidence. You should backup a standard before removing it. When you click on the Remove link you will be asked for confirmation and given the option to create a backup copy.*

To be available, users must next be assigned to one or more of the standard's teams.
Click the **Teams** function link and follow the process described in the Teams section to achieve this.

Backup copies of standards may be added to the list of standard by clicking the **Retrieve backup** link. This is a useful feature which allows an administrator and other users to look at earlier versions of a submission or restore it to active status. See the See the Backup & Archive section for information about how to create backup copies.

Once added they will appear in a separate list as in the example below.

These are retrieved standards.

Title	Description	Version	Status		Function
PCI-EV	Payment Card Industry Data Security Standard *Training or Evaluation Copy Only* *Backup date: 4/26/08 5:13 PM* *Retrieved on: 1/21/09 4:57 PM*	Rel 1.1 Sep 06	Unavailable		Remove Properties Restore View
SACS	Southern Association of Colleges & Schools *Backup date: 1/21/09 6:24 PM* *Retrieved on: 1/21/09 6:26 PM*	2008 Edition	Available		Remove Properties Restore View

By default, retrieved standards are set with a status of Unavailable and are not viewable by users. If required, a retrieved standard may be made available for viewing by changing the status to Available. Users who are members of the standard's teams will have access via the Retrieved Standards area of their standards list.

To Set the Status of a Retrieved Standard

1. Click the **Properties** link
2. Select a **Status**
3. Add an optional **Comment** (this will appear below the standard description field)
4. Click **Submit**

A retrieved standard may be removed from the list by using the **Remove** link. The standard must have a status of **Offline** for this link to be active.

It may also be reinstated as the active online standard by using the Restore link.

6.5.1.1 Properties

The availability of an agency standard and its status through the preparation cycle is controlled via the **Properties** function.

To Set the Properties of an Active Standard

1. Select a **Status** There are four possible settings:
   - Online - the standard is available and may be edited by the assigned team members.
   - Locked - the standard is available for viewing only; it cannot be edited by the assigned team members.
   - Response - the standard is in response mode; the original submission can no longer be edited.

     Any existing statuses and due dates may be cleared by checking the box. If the standard is already in response mode, you can start a new cycle by selecting the radio button.
   - Offline - the standard is not available; it will not appear on the list of active standards for assigned team members.
2. Add an optional **Comment** (this will display for each team member below the standard description field, but will not be included in any published version).
3. Select a **Website Template** to be used when publishing this standard (if none is available, the default template will be used). See the Presentation templates function for more detail.
4. Select a **PDF Template** to be used when publishing this standard (if none is available, the default template will be used). See the Presentation templates function for more detail.
5. Select a **MS Word® Template** to be used when publishing this standard (if none is available, the default template will be used). See the Presentation templates function for more detail.
6. Click the **Collateral** checkbox to allow Other collateral to be associated with the standard. Select the whether you wish to include a single item or multiple items with the published submission website.
7. Click the **Partial publishing** checkbox to allow selection of specific top level sections when Previewing or Publishing. (Not available if the standard is in response mode.)
8. If the agency standard is the **Index to HLC Criteria**, select the relevant AQIP standard for reference.
9. Click **Submit**

Once a standard has been set in Response mode, the original submission can no longer be edited. Do not set the Response status until a submission has been completed and published and a backup has been created. See Response Cycles for more information.

To Set the Properties of a Retrieved Standard

1. Select a **Status** There are two possible settings:
   - Available - the standard is available for viewing by the assigned team members; it cannot be edited.
   - Unavailable - the standard is not available; it will not appear on the list of retrieved standards for assigned team members.

6.5.1.2 Backup a Standard

A Backup is a snapshot of the active agency standards template at a point in time. A backup may be generated at any time and with a frequency that suits the policy of the organization. Regular backups are recommended to protect against data loss or system failures since they can be Restored. A backup copy may also be retrieved for viewing purposes.

To Create a Backup of a Standard

1. Click the **Backup** link
2. **Save** the compressed (.XBF) file to a local resource, or to a backup server if available

The file will be identified with the standard name and a timestamp. If the file is large it may take some time to download, depending on your connection speed.

Once a submission cycle has been completed, a standard may be removed from the active list through the Archive function. This will generate a compressed file that will include: the Submission, the supporting Evidence, the Activity log and Team membership.
An archive is for record keeping purposes only and, unlike a Backup (see above), cannot be returned to an active state.

To Archive a Standard

1. Click the **Archive** link
2. **Save** the compressed file to a local resource
3. The standard will disappear from the active list

*Note: If a standard has been archived and the organization is ready to start the next submission cycle, using the **same version** of the standard, import the standard matrix again to add it to the active list and start the new cycle. If the organization wishes to reuse information that was used in the previous submission, use the restore function (see below) and then edit the resulting matrix as appropriate.*

6.5.1.3 Restore a Standard

A backup of a standard can be made **Active** through the **Restore** function. However, there must already exist an active agency standards template of the same version for the restore to succeed. For example, a SACS Version 2007 backup cannot be restored into an active SACS Version 2008 agency template.

Caution! *The restore function will **replace** the current active version of the* agency template*. Any changes made to the submission between the date of the backup to be restored and the current version will be lost. Therefore, it is strongly recommended that a backup is made of the current active agency standards template before a retrieved backup is restored.*

To Restore a Backup of a Standard

1. Click the **Restore** link
2. **Confirm** replacement of the current active standard
3. Select whether the standard will be **Offline** or **Locked** when restored. You will be able to change this setting later via the Properties function.
4. Edit the **Comment** as appropriate. The system will automatically include the date and time of the backup and retrieve actions.
5. Click **Submit**

Depending on the size of the backup, the restore operation make take several minutes to complete. Once the restore is complete you will receive a notification if there were users as team members in the backup version that no longer exist in the system.

6.5.1.4 Settings

Each standard may have its own set of specific attributes for the published submission website or document (PDF or MS Word®) format.
***Note**: Some of these functions may not apply to custom designed website templates.*

Document Banner

1. Click the **Banner** link
2. **Browse** for a suitable graphics file. This must be a GIF image file that conforms to the required dimensions. A minimum of 300dpi is recommended for good print quality.
3. Click **Submit**

Document Cover Page

1. Use the **text editor** to create or edit a cover page. (For certain agencies this information may have been pre-loaded as part of the standard.)
2. Check the **enable** box to include the page in the submission document.

Document Header & Footer

1. Enter text for the **title**, **header** and **footer** as appropriate.
2. Click **Submit**

Preamble

Click the Preamble function link to open the Text Editor and add an introduction to a submission in both website and PDF/MS Word® formats. When finished, click the Submit button and the preamble will be updated. It may be edited at any time as required.

Website Banner

1. Click the **Banner Upload** link
2. **Browse** for a suitable graphics file. This must be a GIF image file that conforms to the required dimensions.
3. Click **Submit**

Images that exceed the recommended dimensions will cause problems with the tabs on the website.

Website Header & Footer

1. Enter text for the **header**, **sub-header** and **footer** as appropriate to appear on each website page (excluding the welcome page).
2. Click **Submit**

Website Locations

Each licensed agency standards template will include a Built-in published website location with a type listed as INTEGRATED. This built-in location is not editable, however any existing content may be removed using the **Clear** function.

External access to the published website can be managed using the Reviewers function in the Administration menu.

Any published submission websites that existed prior to Version 3.1 of Xitracs will not be integrated.

*Concord will have created a location for the website and provided you with the viewer logon parameters. Access to these earlier (non-integrated) websites **cannot** be managed using the Reviewers function.*

You can specify additional web-server locations for your submission. This is useful if you wish to set up an intranet site for internal review of a submission prior to publishing it to an externally accessible site.

1. Click the **Create** location link
2. Enter a **Name** for the location
3. Enter the **Server** information. This will typically be an IP address or FTP path.
4. Enter a **Logon** and **Password**
5. Enter a **Path**. This is a directory location on the server.

   ***Note**: If you are hosting the website on your own server and are not familiar with these settings, contact your Network Administrator.*

Website Tabs

The standard website template format uses a tab metaphor to access the various parts of a submission. These labels can be edited if required. Check the box to enable/disable a tab.

If the standard is in Response mode, a tab is provided to link back to the original submission.

Even if the Collateral tab is enabled it will not appear on the website unless an item has also been uploaded. See Edit Standard > Other.

Website Welcome Message

The home page of the submission website includes an area for a welcome message. Use the text editor to add a message.

Website About Tab

Additional information may be added for the benefit of a published website viewer under the **About** tab.

For example: how to navigate the site, where to get questions answered. In addition, optional links are provided to **Calendar of Events**, **Team Roster** and **Visit Agenda** information pages.

6.5.2 Map Standards

The Map Standards function allows administrators to copy the supporting narrative and evidence from one standard to another. This is useful when an institution has multiple accreditation standards that contain similar sections, such as the Institution Mission and Goals. By mapping existing content, considerable time can be saved by avoiding the re-keying of duplicate information.

Mapping is a copy function which creates a new instance of the narrative and evidence in the target standard.

A standard may also be mapped automatically using an import file provided by Concord. This function is used, for example, when updated to a newer version of an agency standard.

To Map a Standard Manually

1. Select the **Target** standard
2. Click **Submit**
3. Select the **Source** standard (see below if the source standard is in Response mode).
4. Click **Submit**
5. For each applicable target row/section, select the relevant source using the drop-down
6. When complete, click **Submit**

*Note**:** Only those target rows that are to be mapped need be identified in the drop-down; the remainder may be left blank.*

If the source standard is in Response mode, a drop-down is provided to select the cycle to be used for copying narratives and evidence. The drop-down will default initially to the current cycle. You may select other available cycles, including the original submission. If you want to copy evidence from more than one cycle, for example the original submission plus the current response cycle, map using the first required cycle and then map again using the next required cycle and so on; the evidence will be copied cumulatively. Note however that the narrative is not cumulative and is overwritten with the last selected cycle.

To Map a Standard Automatically

1. Click on the import file link
2. **Browse** for the mapping (.xms) file provided by Concord
3. Check the box if you want the **due dates** from the source standard copied to the target standard
4. Click **Submit**

The system will look for the source and target standards defined in the file. If you do not have these loaded on your system the mapping will not function.

6.5.3 Muti-Use Standards

Multi-use Agency Standards Templates may be licensed from Concord and allow the client to create multiple instances of the same agency standards. For example, an institution that has different campuses or colleges that must each make an agency submission will benefit from the ability to create separate instances of an agency standards template.

To view the available multi-use standards, click on the link in Standards > Control Panel. If none are listed or one or more licensed standards is missing, contact your Concord representative.

To create a new instance of a standard, click the **New** link enter a **Title** and click **Submit**. Choose a title that will help identify this instance. You can add descriptive information later by using the Manage Standards > [*Standard*] > Properties function.
Note: The title cannot be the same as an existing instance.

Once the instance is created, it will appear on your list of standards. See Control Panel > Manage Standards. You may then assign team members, set properties etc.

To Remove a multi-use standard from the list, click the **Remove** link.

Do not remove a multi-use standard from the list unless you have no further use of the template. Removing a standard template from the list will not affect any active instances that may exist.

6.5.4 Portal Email Settings

Portal users assigned to sections of a compliance report can be notified by email. The settings function will let you define the default email message.
Use the variables defined between <% %> to include this information in the body of the email. If you are including a specific sender email address, make sure that this will not be blocked by your institution's firewall.

6.5.5 Presentation Templates

The published format of a submission can be configured to provide a customized 'look-and-feel' using a template.

You can assign a **Website, PDF** or **MS Word®** template to a specific agency standard via the Manage standards > Properties function.

Website templates have a *.xtm* extension. PDF templates have a *.xtf* extension. MS Word® templates have a *.xtr* extension. Templates can be provided by Concord as a professional service or customer developed.

***Note**: Template development requires knowledge of HTML and XSL. A design guideline document is available from Concord on request.*

To Upload a Submission Template

1. Click the Website, PDF or MS Word® **Template Upload** link
2. **Browse** for a template file
3. **Edit** the template name as appropriate
4. Click **Submit**

The template name may be changed later if required by using the **Edit** link. If the template supports **End-notes**, using the Edit link to enable/disable. When the End-notes function is enabled, any evidence link within the narrative will be replaced by an end-note reference number.

To remove a template from the system use the **Delete** link. If the template is already assigned to a standard, it will be replaced by the system default website template.

If the template supports image graphics, these may changed using the **Image** link. Use the **Replace** function to upload a new JPEG image file which must have a JPG extension.

Note: The new image may be of any dimension, but care should be taken that the size is consistent with its position and appearance on the page when the website is rendered. This can be verified by generating a preview of the standard. If the image does not look suitable, upload a replacement.

6.5.6 Manage Projects

The **Manage Projects** function allows a system administrator to create projects and edit project details.

To Create a Project

1. Click the **Create a new project** link
2. Enter a **Name** and **Description**
3. Optionally you may enter a **URL** - this will be accessible to team members via a **More Information** link next to the project name
4. Enter a Start and End Date for the project
5. Select a project **Type** *(see below to define types)*
6. Optionally you may select an **Agency Template** to link the project to

Linking to an agency template will allow project team members to view progress of the template completion.

Use the **Edit** link to change project details and to set the project **Status**:

- **Online** - team members can view and update project tasks
- **Offline** - the project is not available
- **Locked -** team members can view but cannot update project tasks

To remove a project use the **Delete** link

To Manage Team Members

1. Click the **Team** link
2. Click the **Members** link for the relevant team
3. **Add** or **Remove** users as appropriate

Project Types

The available drop-down selections may be defined

Task Types

The available drop-down selections may be defined

7 Resource Library

7.1 Overview

The Resource Library module allows users to store and share documents for use in the creation of an accreditation or compliance submission. Any type of electronic file may be stored, including multimedia. In addition, URLs may also be captured. A familiar Folder metaphor is used to allow items to be categorized and sorted in a manner that best suits the system users. In addition, a Search function allows users to locate items by using keywords.

If the **Multi-Library** feature is installed, users with a System Administrator role can define additional libraries and assign users via the Groups function. The libraries available to a specific user will appear in a drop-down selector at the top of the folder list. See the example below. Put your mouse on the icon to open a pop-up description of the functions you may perform depending on the role.

When in a library, the functions available depend on your role as follows:

Function/Role	Editor	Contributor	Viewer
View item	X	X	X
Add item	X	X	
Edit own item	X	X	
Edit any item	X		
Delete own item	X	X	
Delete any item	X		
Add folder	X		
Delete folder	X		

7.2 Folders

Folders are a simple and familiar way to store and categorize items.

Click on the icon to **Create a New Folder**. Enter a Title for the folder and click Submit.
To add a folder **Description**, click the icon. Once added, the description may be viewed by putting your mouse pointer on the icon.

Multiple levels of folders may be created if desired.

To **Open a Folder**, click on the icon or the **Title** of the folder. An open folder displays the icon. Click on a folder link again to close.

To Close all folders, click on the **Library Folders** link at the top of the folder tree.

To **Rename, Move** or **Delete** a Folder Title, click on the icon. A folder and its content can be moved to another folder in the same library, or to another library in which the user has an Editor or Contributor role.

Note: A folder cannot be deleted if it contains items

7.3 Items

Items consist of an electronic **file** or a uniform resource locator (**URL**).
Any type of electronic file may be added to the library, including multimedia objects.

To Add an Individual Item

1. Click on a **folder** where the item is to be added
2. Click the **Add new** item icon
3. Select the item **type**, File or URL
4. Add an item **Title**
5. Add optional **Notes** if appropriate
6. Click **Upload**

***Note**: If the file is large, it make take some moments before the receipt page is displayed.*

***Note**: Files with extensions .exe .bat .java .jsp .js will be rejected*

Folders and items can also be added to the library in bulk by using the **Drag-and-drop** feature. This is a useful way to copy an existing files from a local or networked drive.

To Add Folders and/or Items in Bulk

1. **Open the library folder** where you want to add the folders and/or items
2. Click the **drag/drop function link**
3. A **Drop Zone** panel will be displayed
4. Open **Windows Explorer** and size the window so the drop-zone is visible
5. **Select the folders and/or items** in Windows Explorer that you wish to copy
6. **Drag** them with your mouse into the Drop Zone
7. The selected folders and/or items will be copied into the open library folder

***Note**: The drag-drop function uses a Java applet. It will not function unless your browser is configured to allow applets.*

***Note**: Files with extensions .exe .bat .java .jsp .js will be ignored and will not be added.*

To Edit an Individual Item

1. Click on the icon next the item
2. To change the title and /or notes, click the **Edit** link
3. To move the item to another folder or library, click the **Move** link
4. To replace the item, click the **Replace** link

5. To delete an item, click the **Delete** link

A grayed-out properties icon indicates that you do not have permission to edit the item. See library roles.

***Note**: Changes made to, or deletions made of library items will not affect documents (evidence) in standards or plans, even if they were previously copied from the library.*

7.4 Search

Items in the Resource Library can be located by a search function. The system will look for a match in the item title, description and notes (if applicable).

Enter a search term in the box provided and click the **Search** icon or simply press the **Enter** key.

A list of any matching items will be returned.

8 Calendar

8.1 Overview

The Xitracs Calendar feature allows users to track events by date and time. Events may be added manually or system generated in the case of due dates.
When the calendar tab is clicked, the user is presented with the current and following month in a day-of-the-week calendar metaphor, with events for the day. The calendar may be viewed in a list format only by clicking the **List View** link at the top of the page. Click on the **Calendar View** link to go back to the day-of-the-week calendar metaphor.

To change the month being viewed, click the **<** (back) or **>** (forward) arrow link to the left and right of the month header.

By default, all standards (or plans) for which the user is a team member are displayed. If the user is a team member for more than one standards, the calendar view may be filtered by selecting the appropriate standard using the drop-down function at the top-left of the calendar.

Once a specific standard or plan has been selected, an **Activity Log** link will also be available to users with a role of Manager. Click on the link to view the log for the relevant month.

Days that have **Events** are highlighted with a blue icon
Days that have **Due Dates** are highlighted with a red icon

Roll-over the icon to view the number of events and/or due dates for that day.
Click on the icon to display the details.

If there are **Ongoing Events** (i.e. those that span the current month), these will be displayed in list format.
If there are **Requirements Due** for the selected month, these will be displayed in list format.

The Standards module and Planning module calendars are separate. Dates from the Projects feature are included in the Standards calendar.

If the user is a team member of multiple standards, use the drop-down function to filter events by standard.

If the user is a team member of multiple plans, use the drop-down function to filter events by plan.

If the Alerts function has been set, users can receive email notifications of calendar due dates.

8.2 Add or Edit Events

Only users with a system role of **Manager** can add, edit or delete events.

To Add an Event

1. Click the **Add Event** link
2. Select the **Standard** or **Plan** to which the event applies
3. Select the event **Type**
4. Enter a **Name** and **Description** for the event
5. Optionally select a **Start Time** and **End Date & Time** for the event
6. Click **Submit**

You may optionally add the event to your **Microsoft Outlook®** calendar by clicking the icon

To Edit an Event

1. In the Calendar View, click on the **List View** link
2. Click the **Edit link** next to the relevant event
3. **Edit** as appropriate
4. Click **Submit**

To Delete an Event

1. In the Calendar View, click on the **List View** link
2. Click the **Delete link** next to the relevant event
3. Click **Yes** to confirm or **No** to Cancel

To Edit or Delete an Ongoing Event

1. In the Calendar View, click on the **List View** link
2. Use the calendar back button to locate the month in which the event started
3. Follow the instructions above for editing or deleting an event

Note: *Due Dates are generated from the relevant standards or plans and may be changed using the Standards Edit or Plan Edit function*

9 Administration

9.1 Overview

The Systems Administration Tab provides authorized users with access to key management functions for the Xitracs system. The tab is only available to users with a role of **Administrator**.

Administrative functions are grouped into six categories:

- Manage Users
- Module Settings
- System Configuration
- System Reports
- System Settings
- Xitracs Portal

***Note**: Not all functions described in this section may be available, depending on modules licensed or installed.*

9.2 Manage Users

9.2.1 Add Users

The following sections describe the administration of **system level** users. Portal users, e.g. faculty and staff, are managed separately.
If the Credentials module is installed, see Control Panel > Manage Faculty & Staff members. Otherwise, see Administration > Xitracs Portal > Users.

Users can be added to the system individually or via an import file.

To Add an Individual User

1. Click the **Add** link
2. Enter a **User ID**. *This will be used as the logon*.
3. Enter **Last Name**, **First Name** and **Email** address
4. Enter a **Password**, or leave blank if the system is connected to a central authentication server. (See Authentication/Single Sign-On).
5. Optionally set an **Expiry Date** for the password. *This does not affect and central authentication.*
6. In a multi-campus system, select a **Campus** from the drop-down. If no campus is selected the user will have access to all campus items.
7. Select a **Role** of **User**, **Manager** or **Administrator** (see table below)
8. Select whether the user has access to the **Standards module**, **Credentials module, Planning module or Programs module**

   ***Note**: If no option is selected, the user access will be limited to the Home page, Library, Calendar and Discussions.*
9. If the user has a role of Manager, access to a module **Control Panel** may also be selected. Users with a role of Administrator always have access to the control panel.
10. For users with Credentials module access, optionally select a File-Q role of Contributor and/or Processor. File-Q contributors can drag/drop files into a document queue. File-Q processors can view and profile documents in the queue.
11. Click **Submit**

The tabs and associated functions available to a particular user will vary depending on the user's role in the system. Users with an Administrator role will also have an **Administration** tab.

Assigning a user to the Manage team for a standard or plan will not give access to all the manage functions unless the user also has a role of Manager or Administrator.

Standards Module Tabs

User Role	Tabs Available							
	Home	Agencies	Library	Projects	Calendar	Discussions	Reports	Control Panel
User	x	x	x	x	x	x		
Manager	x	x	x	x	x	x	x	See note
Administrator	x	x	x	x	x	x	x	x

Credentials Module Tabs

User Role	Tabs Available							
	Home	Faculty	Library	File-Q	Departments	Schools	Reports	Control Panel
User	x	x	x	See note	x	x		
Manager	x	x	x	See note	x	x	x	See note
Administrator	x	x	x	x	x	x	x	x

Planning Module Tabs

User Role	Tabs Available								
	Home	Plans	Library	Summary	Surveys	Calendar	Discussions	Reports	Control Panel
User	x	x	x			x	x		
Manager	x	x	x	x	x	x	x	x	See note
Administrator	x	x	x	x	x	x	x	x	x

Programs Module Tabs

User Role	Tabs Available							
	Home	Programs	Search	Summary	Maps	Library	Reports	Control Panel
User	x	x			x	x		
Manager	x	x	x	x	x	x	x	See note
Administrator	x	x	x	x	x	x	x	x

Assessment Module Tabs

User Role	Tabs Available							
	Home	Assessment	Courses	Outcomes	Rubrics	Library	Reports	Control Panel
User	x	x	x	x	x	x		
Manager	x	x	x	x	x	x	x	See note
Administrator	x	x	x	x	x	x	x	x

Note: Users with a Manage role must also have the Control Panel access option selected. File-Q access requires an access option to be selected.

9.2.2 Find Users

Existing users may be located by searching using the User Id, Last Name or First Name. Alternatively, click the **List all users** link

User details may be edited and users may be deleted from the system via this function.

To Edit or Delete a User

1. Click the **Edit** link..
2. **Search** for the user or click the **List all users** link.
3. Click the **Edit** link next to a user to change details or the **Password** link to change the password.
4. In the Edit mode the user's **Last Name**, **First name**, **Email Address**, **Role** and **Module Access** may be changed.
5. In a multi-campus system, select a **Campus** from the drop-down. *(This option is available only when the Campus extension is installed.)*
6. To **Delete** a user, check the box next to the name and click the **Delete** button.

9.2.3 Groups

Users may be assigned to one or more **Groups**. By default, every user is automatically assigned to the **All User** group. Each group may in turn be assigned membership of one or more **Libraries**, together with an associated role.

To Create a Group

1. Click the **Create a user group** link
2. Enter a **Name** and **Description**
3. Click **Submit**

To edit or remove a user group, use the **Edit** and **Delete** links.

To Assign Library Access

Note: To create libraries, see Administration > System Configuration > Libraries .

1. Click the **Libraries** link
2. For each library to be assigned, select a group **Role** (see below) from the drop-down or leave blank if not to be assigned.
3. Click **Submit**

Function/Role	Editor	Contributor	Viewer
View item	X	X	X
Add item	X	X	
Edit own item	X	X	

Function/Role	Editor	Contributor	Viewer
Edit any item	X		
Delete own item	X	X	
Delete any item	X		
Add folder	X		
Delete folder	X		

To Assign a User to a Group

1. Select a user using the Find function
2. Click the **Groups** link
3. **Check the box** for each group membership required
4. Click **Submit**

To remove a user from a group, uncheck the appropriate box

Note: A user cannot be removed from the All Users group.

9.2.4 Import Users

Users may be added to or removed from the system using a file import.
A file format specification is included in a separate document, **Xitracs Data Import Guide**.

9.2.5 User Access

For systems where the Credentials, Planning or Programs modules are installed, user access to specific departments can be controlled.

1. Go to Administration > Manage Users > **Find**
2. Click the **Access** link next to a user
3. Use the **Edit** link to define the **Schools** or **Departments** that the user can access

When a school is selected all departments in that school are included. Any specific department selections in that school will be ignored.

If no selections are made all schools and all departments will be available.

The Plan or Program View by Group option is not available to any user where access is restricted to specific departments.

Note: A user must also have access the to the module. See Administration > Manage Users > Find > [USER] >Edit.

9.2.6 User Settings

Certain user options can be controlled through the User Settings function.

Password Settings

Check the box if users will be allowed to change passwords. See also Authentication/Single Sign-On considerations.

The password attributes, such as minimum length, can also be specified.

Check the box if users are to be given a "Forgotten Password" link on the logon page.

The link will allow a user to enter a User ID and, (subject to User ID validation), request a password reminder be sent to the user email address of record.

***Note**: The forgotten password function cannot be enabled if users are not allowed to change their own passwords.*

Calendar Alerts

Check the box to enable the calendar alerts function. This will generate emails to the relevant users to remind them of specified due dates in standards, plans and projects.

An individual user can opt out of receiving alerts by clicking on the User details link.

9.3 Module Settings

9.3.1 Alerts

Email alerts can be generated by the Xitracs system to advise users of calendar due dates.

If enabled, a setting will be available for each user via the User Details link.

To Configure Alerts

1. Set the Time at which email alerts will be sent (24 hour format)
2. Enter the sender's email address.
3. Enter the email Subject
4. Enter an email header and footer. (The automatically created alert information will be inserted between the header and footer.)
5. Click Submit.

***Note**: To receive alerts, each user must also enable the function via the User Details link.*

9.3.2 Announcements

You can post announcements to appear on the Portal (Home Tab) and optionally set display dates. Longer announcements appear in shortened form with a "more..." link to allow a user to view the entire posting.

1. Click the **Announcements** link
2. Click the **Create an announcement** link
3. Enter a **Title** and **Text** of the announcement
4. Set a **Display** and **Hide** date (optional)
5. Click **Submit**
6. The announcement may be edited later using the **Edit** link

9.3.3 Banner

A custom graphic can be uploaded to appear on each page above the tab menu.
This must be a JPEG image .jpg file and the dimensions should be 450 pixels wide by 45 pixels high.

1. Click the **Banner Upload** link
2. **Browse** for a suitable graphics file. This must be a .jpg file that conforms to the required dimensions.
3. Click **Submit**

9.3.4 Campuses

Note: This function is only available on Xitracs systems with the Campus extension installed.

For systems configured to support more than one campus, the **Manage Campus** function will be enabled.

Create, **Edit** or **Delete** a campus by using the appropriate link.

In multi-campus environments, users can be assigned to a specific campus via the Administration > Users function.

Schools can be associated with a campus via the Credentials Module > Control Panel > Manage Schools function.

Note: *Once a school has been associated with a campus, the Delete Campus function is disabled. The school association must first be removed for the Delete function to be enabled. (See Credentials > Control Panel > Manage Schools).*

9.3.5 Departments, Schools & Courses

The following applies only to those Xitracs systems where the Credentials module is **not** installed. For Xitracs systems with the Credentials Module installed, management of schools and departments is via the Credentials > Control Panel > Manage departments function.

Department and Schools

Plans and Programs can be linked to a department. Also, Xitracs Portal™ users **must** belong to a department. Departments are a subset of a school, therefore at least one school must exist in order to create a department.

Schools are the highest level of organization within an institution. For example: School of Business, School of Medicine.
There must be at least one school defined in the system.

School **Names** must be unique. For example, there cannot be more than one "School of Business". However, "School of Business" and "Graduate School of Business" is acceptable.

In the system hierarchy, Schools have Departments, Departments have portal users.

To Add a School Manually

1. Click the **Schools** link
2. Click the **Create a school** link
3. Enter the **Name** and short **Description** for the school
4. Click **Submit**

To Add or Remove Schools by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Schools** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a School

1. Click the **Schools** link
2. Click the **Edit** link for the relevant school
3. Update the **Name** and **Description** as appropriate
4. Click **Submit**

Department **Names** must be unique. For example, there cannot be more than one "Finance Department". However, "Finance Department" and "International Finance Department" is acceptable.

To Add a Department Manually

1. Click the **Departments** link
2. Click the **Create a department** link
3. Select a **School** with which the department is to be associated
4. Enter the **Name** and short **Description** for the department
5. Click **Submit**

To Add or Remove Departments by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Departments** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Department

1. Click the **Departments** link

Alternatively you can locate a department within the **Schools** listing

2. Click the **Schools** link
3. Click the **Departments** link for the relevant school
4. Click the **Edit** link for the relevant department
5. Update the **School** as appropriate
6. Update the **Name** and **Description** as appropriate
7. Click **Submit**

Semesters

Semesters are used in conjunction with Course Sections to establish the periods during which courses are delivered. This information is used to filter certain reports by semester or date range.

To Create a Semester

1. Click the **Semesters** link
2. Click the **Create a semester** link
3. Enter a **Name** for the semester, e.g. Spring 2014
4. Enter the **Start** and **End** dates for the semester
5. Click **Submit**

To Edit or Delete a Semester

1. Click the **Semesters** link
2. Click **Edit** or **Delete** next to the relevant semester

3. Edit the semester **Name** and/or **Dates** if appropriate
4. Click **Submit**

Courses

The Course Catalog is used by the Credentials module to map faculty qualifications to courses taught by semester. The information contained in the catalog can be imported easily by using text files. See the separate publication **Xitracs Data Import Guide** for information on how to prepare these files. The course catalog consists of two parts:

Courses - these are the "parent" course catalog entries

Course Sections - these are the actual instances of courses delivered

A Course must be linked to a Department and must have at least one Course Section. A Course Section must in turn linked to a Semester and one or more Faculty Members.

To Add a Course Manually

1. Click the **Courses** link
2. Click the **Create a new course** link
3. Enter the **Course Code**, **Title** and short **Description** (these field are required)
4. Select a **Department** from the drop-down
5. Click **Submit**

***Note**: If no department is available in the drop-down, there are no departments in the system - see Schools and Departments above.*

To Add or Remove Courses by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import Courses** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Course

1. Click the **Courses** link
2. Click the **Edit** link for the relevant course
3. Update the **Title** and **Description** or other fields as appropriate
4. Click **Submit**

To Add a Course Section Manually

1. Click the **Courses** link
2. **Search** for a course or click **List all courses**
3. Click the **Sections** link for the relevant course
4. Click the **Create a section** link
5. Enter a **Code** and **Title**
6. Select a **Semester**

7. Click **Submit**

***Note**: If no semester is available in the drop-down, there are no semesters in the system - see Semesters above.*

9.3.6 Libraries

User access to the resource library may be managed by creating additional libraries. User assignment to one or more libraries is via user group membership with an associated role.
The default General Library is automatically assigned to the All Users group and cannot be edited or deleted.

To Create a Library

1. Click the **Create** link
2. Enter a **Name** and **Description**
3. Click **Submit**

To edit or remove a library use the **Edit** or **Delete** link

9.3.7 Reviewers

External reviewer access to published submissions and credentials information can be managed.

To Add an External Reviewer

1. Click **Add** a reviewer
2. Complete the **Title** (optional) **Name** and **Email** fields *(the email is the reviewer logon)*
3. Enter a **Password**
4. **Check** the box if you wish the reviewer to have access to Credentials information online
5. Click **Submit**

To Manage Reviewer Access to Published Submissions

1. Click the **Standards** link for the reviewer
2. Select the relevant **Agency Standard** from the drop-down *(Standards with a status of 'Offline" will not be displayed)*
3. Set the **Availability Dates** as appropriate
4. Check the Evidence and Restricted Evidence boxes as appropriate
5. Click **Submit**

Use the **Edit** and **Delete** links to change or remove access to a published agency submission.

⚠ *Only standards published to a Xitracs integrated website can be managed. Websites published to other locations via FTP or HTTP must be secured externally.*

⚠ *Any published submission websites that existed prior to Version 3.1 of Xitracs will not be integrated. Concord will have created a location for the website and provided you with the viewer logon parameters. Access to these earlier (non-integrated) websites cannot be managed using the Reviewers function.*

To Manage Reviewer Access to Credentials Information

1. Click the **Credentials** link for the reviewer
2. Select the **Semesters**, **Document Types**, **Departments** and **Schools** that may be viewed
3. Click **Submit**

The relationship of Schools and Departments is hierarchical. Therefore, selecting a school will automatically include all of the departments in that school.

To include individual departments, make sure the relevant school(s) are not selected.

9.3.8 Spellchecker

You can add custom words to the spellchecker dictionary that is used in the text editor.

To add words manually use the **Add** link.
Alternatively, a list of words can be **Imported** from a .txt file with one word per line.

To remove a custom word from the dictionary use the **Delete** link.

9.3.9 Tags

Tags are a useful means of creating relationships. Tags can be assigned to library items, sections (rows) in agency standards and sections (rows) in plans. A tag may consist of a single word (e.g. "grades") or multiple words (e.g. "student retention"), but should not exceed 50 characters including any spaces.

The Manage Tags function list all tags used in the system. Click the **View usage** link to show where a tag is used.

9.3.10 Xitracs DataPort™

DataPort is an optional feature that automates the transfer of import files such as courses and faculty into Xitracs. It requires that batch jobs be created on the source data system to initiate the file transfer.

Your IT department will need to set this up. A separate publication is available which defines the process. Contact your Xitracs representative for more details.

You can view the file transfer log, check for reported errors and set the email address of those who will be notified when each transfer is made.

You can also test the transfer. Note that this action will update the Xitracs system with the imported data.

9.3.11 Xitracs DataView™

Xitracs DataView™ is an optional feature that lets you create a .mdb (MS Access®) snapshot file of database tables for ad hoc reporting and/or import into a statistical analysis program.

Click on the link to generate and download a snapshot file.

A separate publication is available which defines the tables. Contact your Xitracs representative for more details.

9.4 System Reports

9.4.1 Access Logs

The system records all user access (user and web) to items in the repository in chronological order. The log contains the User Name, User ID, Date, Time, Action, Item and Item ID.
Log files can become large. System Administrators should download and clear logs on a regular basis.

View Access logs

1. Select the required **Date Range**.
2. Check the **View** radio button.
3. Click **Submit**.

Download Access logs

1. Select the required **Date Range**.
2. Check the **Download** radio button.
3. Click **Submit**.
4. Click **Open** to view in Excel or **Save** as a .xls file.

Delete Access logs

1. Ensure that you have **Saved** a copy of the relevant log to a file.
2. Select the required **Date Range**.
3. Check the **Delete** radio button.
4. Click **Submit**.

9.4.2 Current Sessions

This report details the Name, User ID, time user Logged in, Last access and IP Address of users currently logged on to the system.

***Note**: This is a real-time report. No log file is saved by the system.*

View Current Sessions

1. Select the required **Date Range**
2. Check the **View** radio button
3. Click **Submit**

Download Current Sessions

1. Select the required **Date Range**
2. Check the **Download** radio button
3. Click **Submit**
4. Click **Open** to view in Excel or **Save** as a .xls file

9.4.3 Software Updates

The update log displays a chronological list of software updates, including the Version Number, Date and Time of installation.

***Note**: The current version number is displayed on the top right corner of the main Administration page*

9.5 System Settings

9.5.1 Add-Ons™

Xitracs Add-Ons™ are separately licensed optional system extensions that are available from Concord.

An Add-On is loaded into your Xitracs system using the Administration > System Extensions > **Xitracs Add-Ons** link. Once loaded, it will be listed

For information regarding the functionality of a specific Add-On, see the documentation provided or contact your local Concord representative.

9.5.2 License

A License file is provided with the Xitracs software and contains parameters specific to the installing organization, including the number of users and standards supported and which features are enabled.

After the initial installation of the Xitracs system, the license file must be imported for the software to operate fully. If changes are made in the future, (e.g. you purchase additional features), you will be provided with a new license file to install the relevant changes.

To install a new license file:

1. **Browse** for the relevant license file which has been provided to you.
2. Click **Submit**
3. On the receipt page, click the **Server** link
4. Click the **Reload** link, then click **OK**
5. **Logoff** and then **Logon** (each user will need to do this to access any new features)

9.5.3 Server

Certain settings for the application server can be configured by a System Administrator.

Server Configuration Options

Configuration Settings

Some functions in the system are controlled via **Properties** files. These are configured at the time of the system installation and generally are not changed unless there is a system configuration update, such as the addition of a new feature. To avoid having to restart the system when a property file change is been made, the configuration can be reloaded on the fly.

1. Click **Reload**
2. Click **OK** to confirm or **No** to cancel

Email/SMTP Server Settings

Enter the configuration details for the email server. This will be used for all system generated emails, such as Alerts or Survey invitations.

External Server Integration

Certain optional modules and Xitracs Add-Ons™ require integration with an external server.

Refer to the documentation provided with the module for parameter settings.

System Cache

Certain parameters in the system are stored in cache memory to avoid multiple database accesses and to improve performance. The cache is automatically reset at intervals. If one of these parameters is changed by a Systems Administrator, there may be a delay in the change taking affect, particularly in multi-server environments.

The cache may be reset manually, to force an update.

1. Click **Reset**
2. Click **OK** to confirm or **No** to cancel

Authentication/Single Sign-On (SSO)

CAS or SAML Authentication

The Central Authentication Service (CAS) and Security Assertion Markup Language (SAML) are single sign-on protocols for the web. If your institution supports CAS or SAML, it can be configured in Xitracs for single sign-on.

A sign-on link will appear on the Xitracs logon page.

LDAP Authentication *(Not available for ASP hosted systems).*

In most institutions, user authentication is centrally managed using an LDAP compatible service. To enable the system to authenticate users via the LDAP server, the following parameters should be set:

1. Check **Enabled**
2. Enter LDAP Server **URL**
3. Enter **User Path**
4. Optionally, enter **Active Directory Domain** or for **iPlanet** specify the domain to prepend to the logins
5. Check **Fallback** to local password, if required
6. Enter **Additional Servers**, if required
7. Click **Submit**

***Note**: LDAP support is available for up to four servers. A user attempting to login to the system will be authenticated against the primary LDAP server. If no valid user is found then the next additional LDAP server in the sequence will be searched. If the user is not found in any additional server the user will be rejected.*

9.5.4 Updater

This function is not available for ASP (hosted) systems.

For clients with a locally installed Xitracs system, the **Updater** function provides a convenient way to download and install newer versions of the application.

⚠ **Caution**. The updater function should be used by an IT professional who is familiar with the local Xitracs system configuration.

If your Xitracs system is up-to-date, a message will be displayed. If there is a new version of the software available, it will be listed as **Recommended Version available**. If there is a later **Optional Version**, this will also be displayed. If you are unsure of which version to install, contact your Concord representative or open a support ticket. Click on the **Download** link to copy the update file down from the Concord software update server. When the download is complete, an **Install** link will appear next to the update file. Click on this link to initiate the update process.

⚠ Initiating the update process will cause the Xitracs application to go offline. You should make sure there are no users logged on before starting the update. You can check this via System Administration > Current Sessions.

Once started, the update process will take approximately 5 minutes. On completion, a message will be displayed and you will be able to logon to the Xitracs system again. The new version will be displayed on the main System Administration menu page. Sometimes, because of a local server permissions

restriction, the Xitracs system may fail to restart automatically after the update. You will need to restart the Xitracs service manually.

9.5.5 Volumes

This function is not available for ASP based Xitracs systems.

Files uploaded to the repository are stored in a Volume.
In the Xitracs system there is one volume defined (Main).
***Note**: URLs and Text Notes are stored in the database and not in a volume*

If it is necessary to change the volume (for example because the existing disk is full) use the Edit function below.

⚠ Caution! Do not make any changes in this area unless you are familiar with the parameters.

Before changing a volume, make sure all files on the existing volume are backed up and have been copied to the new volume.

To Edit a Volume

1. Click **Edit**. (Volume Names cannot be edited)
2. Edit **Path** and **Alternate Path**, as appropriate
3. Set **Status** as open
4. Click **Submit**

After the new volume has been defined, the Xitracs service will need to be restarted.

9.5.6 Website Store

This function is not available for ASP (hosted) Xitracs systems.

Agency standards template with an INTEGRATED website location will publish by default to the website store volume.

⚠ Caution! Do not make any changes in this area unless you are familiar with the parameters.

Before changing a volume, make sure all files on the existing volume are backed up and have been copied to the new volume.

To Edit a Website Store Volume

1. Click **Edit**. (Volume Names cannot be edited)
2. Edit **Path** and **Alternate Path**, as appropriate
3. Set **Status** as open
4. Click **Submit**

After the new volume has been defined, the Xitracs service will need to be restarted.

9.6 Xitracs Portal™

9.6.1 Overview

The Xitracs Portal™ is an optional module that allows faculty and staff members to view and input certain information, without having to be a Xitracs system user. The Xitracs Portal makes it easy to gather information in a structured way, without these stakeholders having to learn a new system.

Depending on the modules licensed and tabs enabled, the following accessed by a portal user:

- Standards
- Credentials Base Data
- Credentials Qualifications
- Courses
- Surveys
- Plans
- Programs

Access to the Xitracs Portal is available:

1. Via direct logon to the portal URL at http://yourinstitution.xitracs.net/portal.htm if Concord is hosting your system. If your Xitracs system is locally installed, check with your Network Administrator.

2. Via a single sign-on (SSO) link, if the SSO function is installed.

9.6.2 Settings

If the Xitracs Portal™ is installed, the settings can be managed. Use the **Libraries** and **Tabs** functions to control what portal users are able to access. In addition, the graphics and welcome message on the portal home page may be edited. Note that portal users have access to libraries on a read-only basis. See Administration > Libraries for information on how to set up libraries.

A **Forgotten Password** and **Self-Register** link can also be enabled. These links will then appear on a portal user's logon page unless Single Sign-On (SSO) is also enabled. See Server Settings.

9.6.3 Users

The following applies only to those Xitracs systems where the Credentials module is **not** installed. For Xitracs systems with the Credentials Module installed, portal users are added as faculty and staff members via the Credentials > Control Panel function.

Portal users must belong to a department. See Administration > System Configuration > Departments & Schools.

To Add a Portal User Manually

1. Click the **Add** link
2. Enter a **Title** (e.g. Professor, Doctor) - this field is optional
3. Enter a **Last name** and **First name** - these fields are required
4. Enter an **Email** address - this field is required
5. Enter and confirm a **Password**. *See also Administration > Server Settings > Authentication/SSO*

if single sign-on is being used.

6. Select a **Department**
7. Enter a **UserId** and/or **Network Name** if used by your institutions - these fields are optional

***Note**: If no department is available in the drop-down, there are no departments in the system - see Manage Departments*

To Add or Remove Portal Users by File Import

See the publication "Xitracs Data Import Guide" for details on file content.

1. Click the **Import** link
2. **Browse** for the relevant import file
3. Select the data **Separator**
4. Click **Submit**

To Edit a Portal User

1. Click the **Find** link
2. **Search** for a faculty member or click **List all**
3. Click the **Edit** link for the relevant portal user
4. Update the **Fields** as appropriate
5. Click **Submit**

To Change a Portal User Password

See also Administration > Server Settings > Authentication/SSO if single sign-on is being used.

1. Click the **Find** link
2. **Search** for a portal user or click **List all**
3. Click the **Password** link for the relevant portal user
4. Update the Password as appropriate
5. Click **Submit**

9.6.4 User Logs

A **User logs** function is available. This allows an administrator to generate a portal user access report.

Select the date range to be included. The report includes the user, access date and duration and source IP address.

10 Xitracs Add-Ons™

10.1 Overview

Enter topic text here.

10.2 Catalog Publisher

The Xitracs Catalog Publisher Add-On™ is an optional feature that lets you publish the course catalog in the credentials module to a website, either in a downloaded compressed file format or direct to a webserver via FTP.
More information is available from your Concord representative.

In addition to course and section information for selected semesters, the published catalog will also include any associated syllabi, assigned faculty names and CVs (if available).
The look-and-feel of the website can be customized using a template.

To Install the Catalog Publisher Add-On

1. Go to Administration > Systems Extensions > Xitracs Add-Ons
2. Click the **Install** link
3. Upload the relevant Add-On file (*.war) licensed from Concord
4. To uninstall the Add-On, use the **Remove** link

To Configure the Catalog Publisher Add-On

1. Click the **Settings** link
2. Upload a website template using the **Template** link
3. Edit the website template graphics using the **Template images** link

Click **Links** to see where the Add-On is referenced in the Xitracs system.

To Publish the Catalog

1. Go to Credentials > Control Panel > Xitracs Add-Ons > Publish Catalog
2. Select the published **website destination** (FTP or local download)
3. Select the **semester(s)** to be included
4. Click **Submit**

Note: *For FTP locations, the publish function will overwrite any existing catalog.*

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