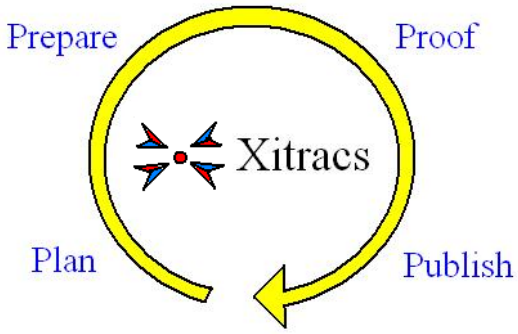
XITRACS Training

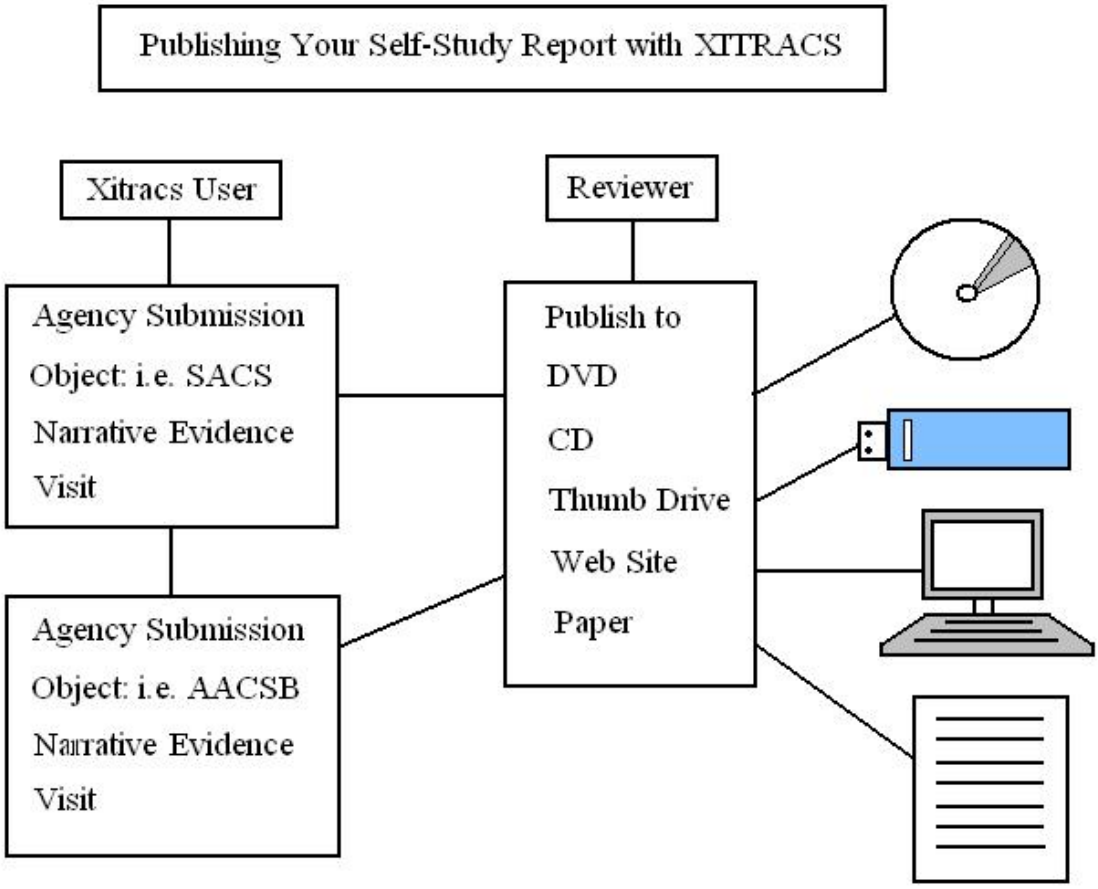
September 25, 2009

Notes by Rollinda Thomas, Ph.D.



Session I: Introduction

1. Executive Information Tracking and Recording for Accreditation and Compliance Systems (XITRACS)
2. System for gathering, managing, and presenting narrative and evidence for accreditation.
3. System provides a:
    a. Detailed list of requirements
    b. Place to enter narrative
    c. Place to attach digital evidence files (Graphics, pictures, tables)
    d. Faculty Credential Reports
    e. Plan assembly tools
    f. Presentation and publication tools
4. Other Features
    a. Library – Repository of files
    b. Course Syllabus
    c. Announcements
    d. Calendar
    e. My Notes



Session II: Adding Evidence (Files), Narrative (Text), and Reviewing Results

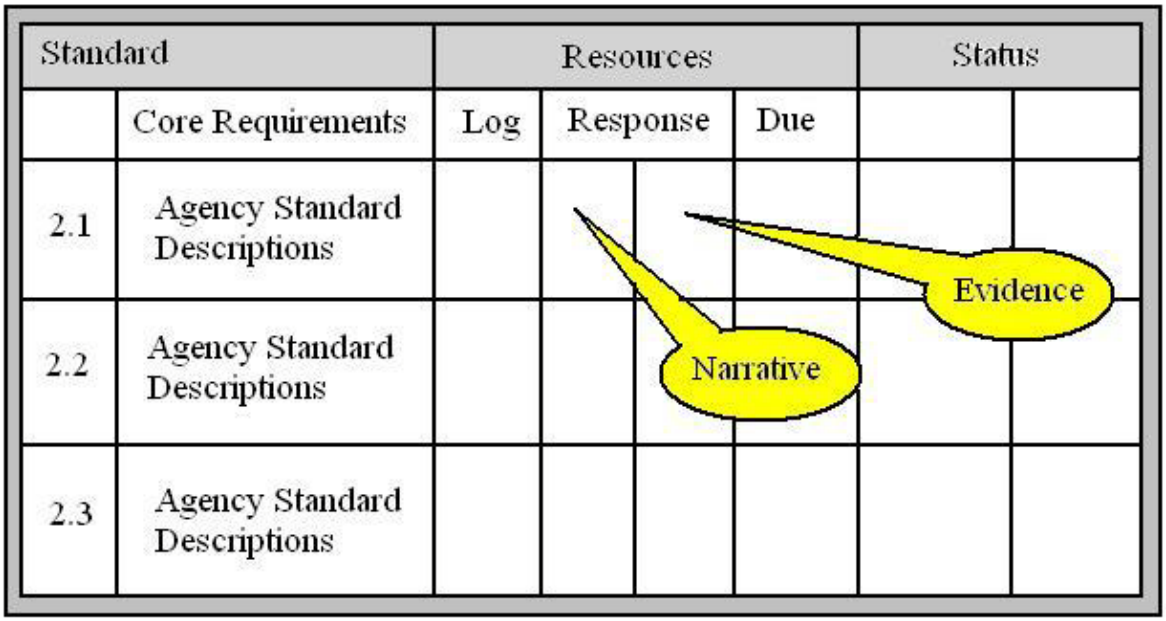
Objectives

1. Techni-speak – To produce an *independent* and *static* digital object that contains Text and digital files.
2. Independent means:
    a. Not dependent upon XITRACS or any specific computer system
    b. No file links back to the XITRACS Library
    c. No external links to websites (except under certain circumstances)
3. Agency Templates –
    a. Contain the details of agency requirements and the mechanism to gather and present responses.

b. Multiple agencies, other compliance initiatives and other applications, such as planning, can be managed by one system.

4. Primary User Work Area

Primary User Work Area



5. Tips from SACS

   a. A Strategic document making a case for compliance with the Principles of Accreditation

   b. Characteristics of a successful "case"

      i. Candid and forthright

      ii. Sufficient evidence/documentation

      iii. Well written

      iv. Analytical

      v. Comprehensive

      vi. Accessible (XITRACS)

      vii. Well organized (XITRACS)

      viii. User friendly (XITRACS)

ix. Keep it “short, sweet, accurate, with plenty of evidence”

x. No narrative should be longer than five paragraphs.

xi. Well-crafted, precise narrative with consistent documentation

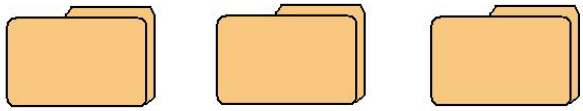
6. Action Users – People who enter the narrative and upload the evidence files (worker bees)
    a. They may be the academic members that created and enter
    b. Activities – Upload, Add Narrative, Have reviewer proofread work
7. Evidence Files
    a. XITRACS can handle just about any file (text, audio, video, graphic, etc.)
    b. Current ‘preferred’ file of the agencies is Adobe.pdf
    c. Try to use smaller file sizes that will open quickly
    d. Most text can be converted to pdf (CUTE PDF program can accomplish this).
8. XITRACS System Library
    a. Library is used to store evidence files that can be re-used in current, future, and other agency submissions.
    b. When an item is selected for use it is copied to the evidence vault.
9. Logon to XITRACS
    a. https://uncfsu.xitracs.net/
    b. Enter local system ID or first part of e-mail address. For example, jdawkins2@uncfsu.edu would be jdawkins2.
    c. Use password: bragg
10. Basic User Techniques
    a. Uses links to move to the next activity
    b. Active icons with list of results of searches or directories
    c. Radio buttons can be used to select something
    d. Remember to press ‘Submit’ to save information. Submit is found at the bottom of the page.

e. Back button is found in the top right corner

11. Uploading Files to the Library

a. To access the Library upload area, click the path A – C from the Home Page.

b. Three folder icons may appear next to the title of your folder.



c. The three folders are used to:

i. Edit folder properties

ii. Add new folders

iii. Upload new information (files)

d. To drag files directly into the folder, click the text called “drag/drop function”. A dialog box will appear named “Drop Zone”. Find a file on your computer and manually drag it into the Drop Zone.

12. Click Agencies tab to enter the Compliance Report and other documents.

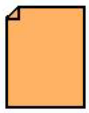
a. Choose a document, such as “SACS TR”.

b. Click “Edit” to make changes or entries.

c. Choose a section of the document to edit, such as “Core Requirements”.

d. The Core Requirements lists SACS standards.

e. If you click the yellow-orange paper icon under “Evidence”, you can enter supporting documentation.



f. It is recommended that information is uploaded to the Library as they are collected. Do not include confidential files (especially documents or transcripts with Social Security numbers).

g. Committee members should be apprised of the folder arrangements to keep up with the location of information.

h. To quickly paste information into a narrative:

   i. Open a document and click Control A to highlight all of the text.

   ii. Click Control C to copy it.

   iii. Go to the Home tab. The dialog box named “My Recent Activity” will show you the SACS document that you most recently used.

   iv. Click the document and select one of the Narrative icons.

   v. When the section opens, click Control V to paste the text.

i. It is recommended that you use Arial font instead of Times New Roman. Testing suggests that Arial is easier to read. This may make the task easier for a reviewer.

j. When you open a browser, it opens a space for a picture. It places the picture into the section. Likewise, graphics can be placed into a narrative.

k. Once you have uploaded files to Evidence, you can create links in the narrative to your evidence files.

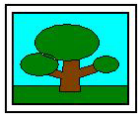
   i. Go to your document and click the Evidence icon (the yellow-orange paper). When the screen changes to “Supporting Evidence”, click File to upload an item.

   ii. When the evidence is posted, return to your document.

   iii. Click the Narrative icon (white paper with pencil).

   iv. Choose Edit Narrative.

   v. If you want to insert an image, click a spot in the narrative where you would like the image to appear. Click the Insert/Edit image icon (small picture of green tree).



   This will open a dialog box that will allow you to choose an image from your evidence list. (If the image is not there, you must upload the desired image from your files to Evidence.)

vi. If you want to insert a link to evidence, highlight the text in the narrative that you would like to link to an item. Click the Link icon (small gray chain link).

This will open a dialog box that will allow you to link to a document in your evidence list. (If the document is not there, you must upload the desired item from your files to Evidence).

l. Try to avoid placing tables into the narrative. Instead, create a link in the narrative to the table. Then the reviewer can access the table as he/she chooses.

Session IV: Applying Credentials Module

1. The Credentials Module allows one to record, assemble, and present the courses, faculty, and credentials or qualifications.
2. Activities – You can input data from files representing:
    a. School and department information
    b. Courses and sections
    c. Faculty and credentials
3. A map allows you to link appropriate relationships
4. Output can include Excel data sheets, pdf files, and dynamic websites where the reviewer can scroll down to see all information on faculty.
5. You can control what the reviewer sees by organizing information into categories of documents.
6. To view information regarding faculty (courses, syllabi, etc.), click the Faculty tab or the Credentials tab.
7. Either choice allows you to search for faculty by name, department, of full list of all faculty members.
8. When you are brought to a list, click Faculty or choose a specific faculty member.

9. If you click Details, the Base Data tab will allow you to view the faculty member's rank, employment status, tenure status, and degree earned. You can upload or view the curriculum vitae.

10. If you click the Qualifications tab, you can view any licenses and certifications achieved by the faculty.

11. The Course tab allows you to view the courses taught, along with the syllabi.

12. The Documents tab allows you to upload and view documents and files related to the individual. It is in a secure environment, to protect sensitive material.

13. SCANTRON will allow one to scan transcripts.

14. Before importing a spreadsheet, make sure that it is typed and formatted in a manner that is user-friendly. It can be more difficult to edit it after it has been uploaded to XITRACS. "Before import, tidy up!"

Session V: Applying the Planning Module

1. The Planning Modules' purpose is to develop matrices for anything you need (templates for Quality Enhancement Plans, Strategic Plans, Operational Plans, outcomes reporting, and project management.

2. Building a plan requires one to put together the SACS standards to be met and the space to answer them.

Session VI: System Administration Functions

1. Planners can be administrators, managers, or users, with various levels of access and ability to manipulate information.

2. Any standards or plans in the system will be in a drop-down menu (if the information is online or uploaded to XITRACS).

3. The Administrator's screen has tabs for Standards, Credentials, Planning, and Administration.

4. Administrators can publish information and insert submission website locations, such as https://uncfsu.xitracs.net/sacs.

5. The Calendar Alerts functions allows you to set due dates. The system will automatically send reminders as the date approaches. Users can opt-into this function. They can enable or disable the messages.

6. Administrators can send announcements and upload a portal banner (image that appears at top left corner of screen, often an FSU logo).

7. Administrators can add external reviewers and determine which type of files they can access.

8. The Standards tab lets the administrator archive, backup, and remove information. They can also manage properties, teams, and settings.

9. Administrators can map standards from one agency to another. For instance, SACS standard 2.7.4 may be equivalent to a standard in CCNE (Commission on Collegiate Nursing Education) accreditation. You can input the numbers of the standards in SACS to their counterpart in CCNE and paste them into another document or system. The new document will automatically reflect the CCNE standards.

10. Three teams: Action, Manage, and Review. The Confidential Team may be added if necessary.

    a. Action team (worker bees; hands-on activities)

    b. Manage Team – have more rights and access

    c. Review Team – Allows persons in administration to check the work that has been uploaded, and make edits if necessary.

    d. Confidential Team – Handles confidential sections

11. Support Services for XITRACS: supportsrvs@concord-usa.com, copy to Howard Taylor. If Mr. Taylor can answer the question, he will respond immediately. Otherwise, he will send it to other tech personnel who may answer within four hours. The answer should be communicated within half a day.

12. Questions may be forwarded to the ITTS helpdesk, to screen for network problems, or other unrelated difficulties. Questions about XITRACS may be directed to Sabin Tulachan. Any problems that cannot be answered at that level will be sent to XITRACS Support Services.

13. The Properties tab allows the administrator to take the system offline or online, lock the system from access, or change the response setting.

14. Be very careful about changing the response setting. XITRACS staff suggests a backup to all information before making this change. If the status of the standard to response changes, you will no longer be able to edit the submission.

15. Don’t change the template to suit individual design or aesthetic choices. Reviewers have become acclimated to the standard format presented in the XITRACS system.

16. The administrator can create additional tabs to lead to the Quality Enhancement Plan (QEP) or other documents.