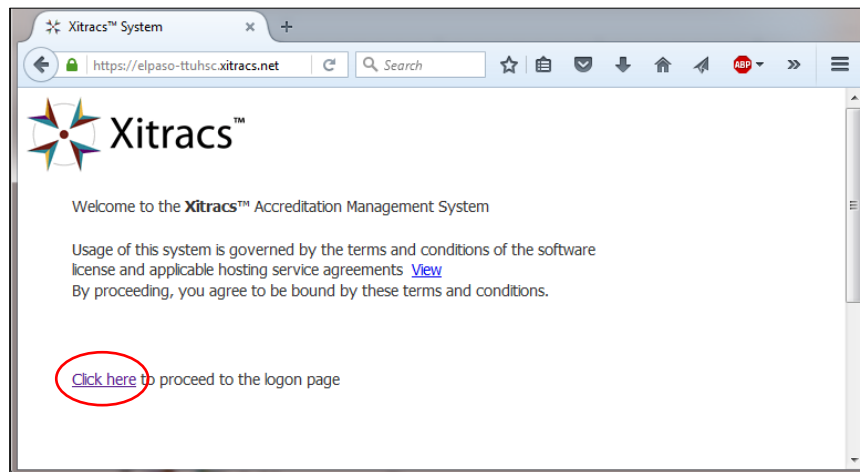# Instructions on using the Xitracs Standards Module

Logging On
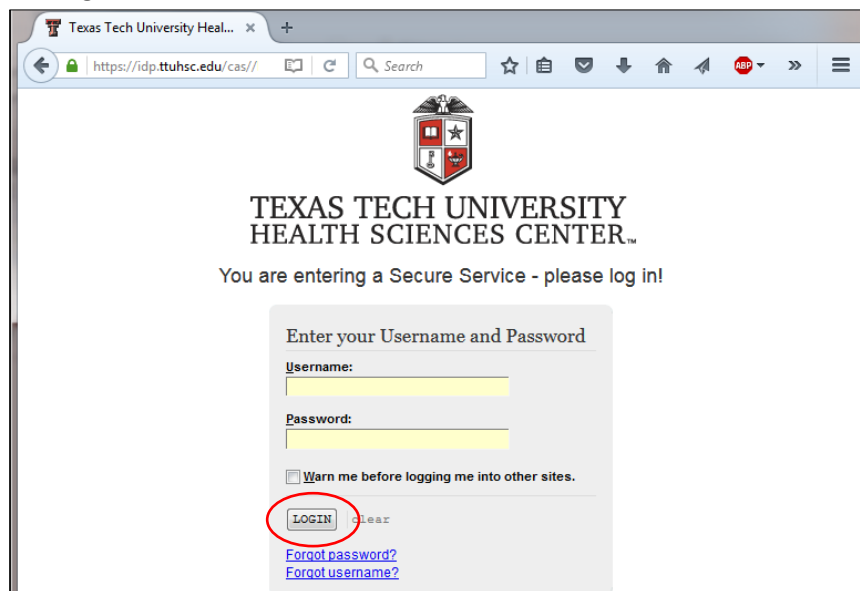
To access Xitracs, the TTUHSC El Paso Accreditation Management System, proceed to the following URL:

https://elpaso-ttuhsc.xitracs.net/

The following page will be displayed. Click on the "Click Here" button to proceed to the logon page:
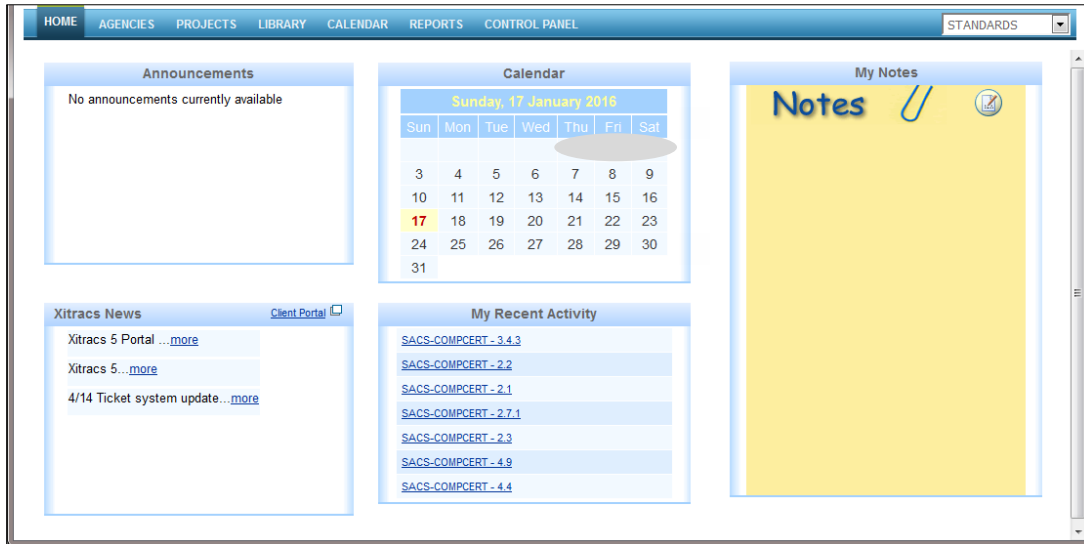

To logon to Xitracs enter your eRaider and password (same username/password used to logon into Windows) and click Login.

Once the user has been authenticated the following home page will be displayed.

Home Page

Note: Depending on the user access level some of the options shown in the above screenshot might not be available.

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.

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).

My Recent Activity
This panel will show you a list of the last seven sections of standards you have worked on. Clicking on a link takes you to the relevant item.
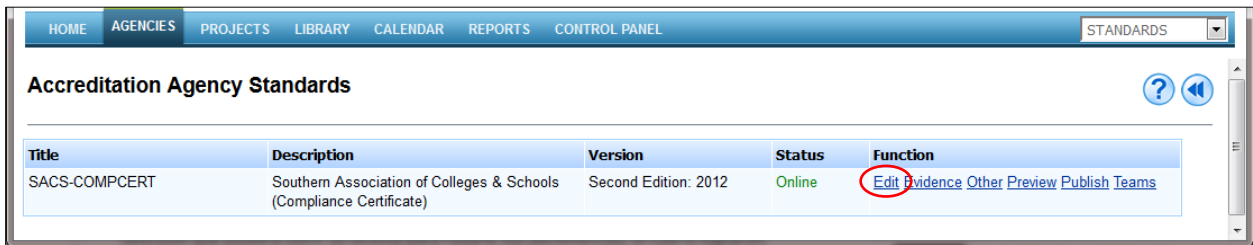
My Notes
You can post short messages for yourself, such as reminders or notes. Just click on the ✎ icon and add or edit text.

Accreditation Standards

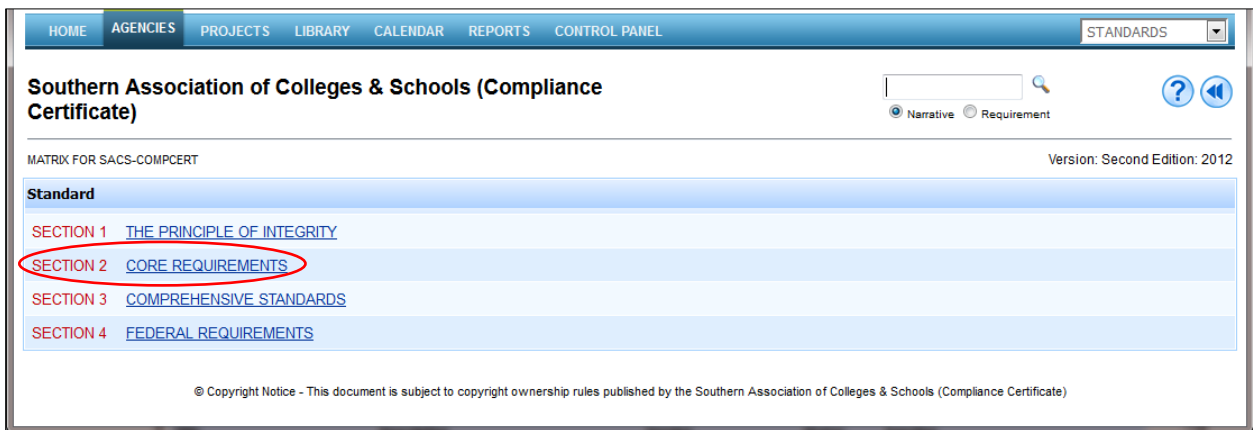To work on an accreditation standard section please click on the Agencies option in the Tab Menu:

This will display the following page:

Note: Available functions are dependent on user access level.

To access a specific standard click on the "Edit" link shown in the "Function" column

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

Log 🔍

To access the activity log for any specific section, click on the 🔍 icon:
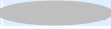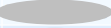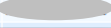
Standard		Resources		Status	
		Log	Information	Due	Preparation	Judgement
CORE REQUIREMENTS						
2.1 The institution has degree-granting authority from the appropriate government agency or agencies. (Degree-granting Authority)		🔍 👤 ✏️ 📇		8/23/11	Draft	Compliance

This will display the following window:

HOME	AGENCIES	PROJECTS	LIBRARY	CALENDAR	REPORTS	CONTROL PANEL	STANDARDS ▼

Activity Log   (?) (◀)

Southern Association of Colleges & Schools (Compliance Certificate)

Section: 2.1 The institution has degree-granting authority from the appropriate government agency or agencies. (Degree-granting Authority)

Action Team: Action *Show members*
Review Team: Review *Show members*

Post comment   Return to *Standard*

Date	Time	Action	User	Detail	Function
1/15/16	12:51 PM	Changed date		New date: not specified	
1/15/16	12:51 PM	Changed date		New date: 1/16/16	
1/14/16	12:24 PM	User Posting		Test Comment	Edit
1/14/16	12:24 PM	Updated narrative			
1/14/16	12:23 PM	Updated narrative			

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 🔍.

Standard Narrative

To access the narrative for any specific section click on the icon:

This will display the following window:

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.

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.

⚠️ *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.

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 🆕 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.

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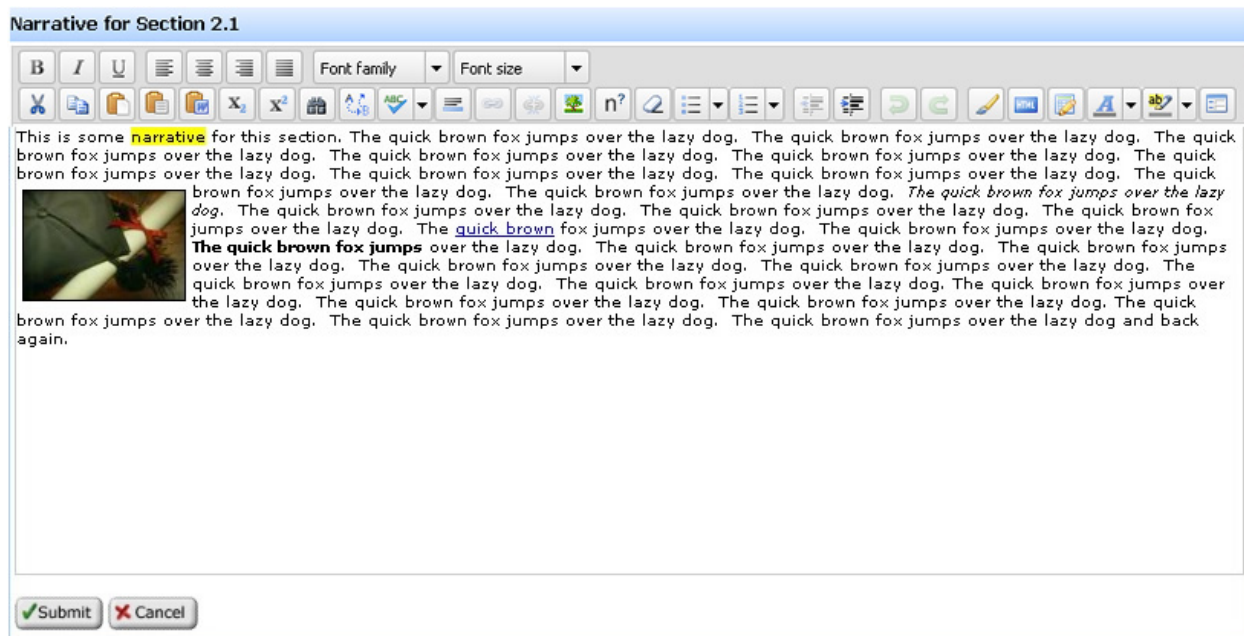
⚠ *After you edit narrative, do not forget to click the **Submit** button.*

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.

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 n? 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.*

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.

Evidence

To access the evidence for an specific section click on the icon:

This will display the following window:

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.

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 **radio button** next to the item
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.