User Guide

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Section 1: Logging In

In order to access the PREP system you will need to visit the PREP logon page through http://www.humboldt.edu/irp/PREP.html or through the directory under P. You can logon with your HSU username (i.e. “abc123”) and HSU password from on or off campus.

After successfully entering your login information, you will be given access to the Program Review Site. Based on the roles assigned to your user account, you will be given access to various departments/programs within your site.
1.1: Home Page

The home page in PREP contains a welcome message that explains the program review process. To access the Programs for Administrative Areas, click on the HSU Programs button, and select “HSU Administrative Services.”

Once you click on HSU Administrative Services, you will be directed to the following page.
1.2: Program Review Directory

In order to reach your department report, click on the drag down arrow next to “Template” from any page. You will have access to your department/programs only that you have been given permissions for.

There will be a tab across the top that indicates “Program Review Report.” Click on this tab.

1.3: Program Review Requirements

The template will bring up the requirements of the review. You will click on the number that corresponds with the data you wish to enter. For instance, if you want to work on the “Program Improvement”, you would click on “4” and there will be a hyperlink that opens.
Clicking 4 on the above screen would direct you to the following page below
1.4: Page Editing

On the right side of any page, there is an Options drop-down menu that displays the various editing capabilities for the area of the site that you are on.

This will allow you to edit the content on the page. Only users with department/program privileges are allowed to edit these pages. In order to edit any page, you MUST select either “Edit Page” or “Edit Item.”

After you select 4, Program Improvement, and select “Edit Item” you see several things. One is the status bar. The Status view will be “Under Development” until the page is done, when it should be changed to “In Review.” When it is “In Review” the Reviewer, Dean and Vice President will have the opportunity to review your input and add comments. Another bar is the Due Date. Many items in the PREP process have assigned due dates. This window will tell you when this part is due, if it has a due date. It will also show an assigned user, if one has been designated.
The narrative is what you will be entering. For instance, this description says to write a brief description of services/activities. The narrative is a rich text format that you can type directly into the text box. If you want to cut and paste a Microsoft word document, you can do that also.

When you are done, press save and close.

You will be prompted by a text box that asks if you want to “Check-In” the document. Only one person may ‘check-out’ a page at a time, so please save and close and “Check-In” the page when you are finished.
Section 2: Uploading a Document

To upload a document, you need to place it in the “Document Directory” tab. This is the tab after the “VP’s Comments.” Click on the “Document Directory” tab and under the “Options” tab in the top right corner, select “Manage Files.”

2.1: Upload File
The upload file window will open where you can provide a name of the file. Click on the “Select” button to browse and select a file for uploading. Click on the “Upload File” button, select file to upload, and click on upload file and close to complete the file upload.
After the file has been placed in the Document Directory, it can be uploaded into your PREP document by adding it to the Document Directory Sources on the page you want to add it to. Click on “+ Add New Source” and the documents in your document directory will be listed. You can add as many as you like.

### 2.2: Dashboard View

On any template page, hover over the Options menu and click the “Dashboard View” link to display an overview of all the report’s requirements and standards. You will only see the “Dashboard View” option if you have been given permission to edit at least one requirement/standard within the report.

For each requirement, the table will display its number, title, judgment, status, due date, assigned user, and whether or not it is currently checked-out. Each requirement title links to the edit page of a requirement. If an item is overdue, a red warning icon will appear next to its due date. You can filter your view by clicking on the heading of any column to sort by this field. For example, if you wanted to sort by the due date, you would simply click on the Due Date...
heading to order by due date ascending. Click on the Due Date heading a second time to order by the due date descending. In addition, the dashboard will show you if any requirements are “checked out”, or currently being worked on by a user in the system. If you have permissions, you can assign sections to users in this view. Then you can send an email to the assigned user by clicking on their name.

2.3: Report Options
From any main report, in order to print the report you are viewing, go to the Options drop-down menu in the upper right-hand corner of the page and select printable file.

2.3.1: Printing a Report
To print an entire report or even an entire set of sections from a compliance collection, go to the report tab and in the Options menu, click on the “Printable File” link. A new window will appear where you can choose the format: either PDF or MS Word.
If you choose to print to PDF, you can set the top, bottom, left, and right margins. You can also set additional options such as text in the footer, page numbers in the footer, add a header logo to all pages, and also attach a cover page with optional text. Click on the “Generate PDF” button to create the PDF. This may take a few minutes to run and will open in your browser window. Once the PDF loads, you can print or save it to your computer.

![PDF Settings](image)

Print to MS Word
If you choose to print to MS Word, you can set the top, bottom, left, and right margins. Under options, you can also set the orientation to be portrait or landscape. To add a header, footer, or a cover page, you must edit the generated Word document. Click on the “Generate Word Doc” button to create the Word document. If you are using Internet Explorer, a security toolbar may appear at the top of the window. Right click on this tool bar and choose “Download File”. Then, either click the “Open” button to directly open it in Microsoft Office Word or click on the “Save” button to save the Word document to your computer.

2.3.2: Copying Content from External Sources
If you need to copy and paste in text from another source, such as MS Word, there are several paste options you can use. To paste, you can click on the right paste button that has the down arrow and choose one of the paste options. The “Paste from Word” is the first option to use that will remove a lot of extraneous MS Word formatting that might cause problems. “Paste from Word, strip font” is the other option to use when pasting from Word that will remove extraneous MS Word formatting and also remove all fonts and sizes. For the best presentation of your report both online and in PDF format, we recommend you always use the “Paste from Word, strip font” option and do not customize any fonts or font sizes within your narratives. “Paste Plain Text” is an option to use to paste text only (all bold and italics will be removed.
along with tables, etc.) The last option is “Paste As Html” which should only be used if you have copied Html code from a website.

After pasting from an external source such as MS Word, extraneous formatting could still conflict with other text that you have added to the narrative text box. To fix additional formatting problems, you can use the “Strip Formatting” icon in the text box tool bar, which looks like a paintbrush. Using this menu, there is the option to “Strip All Formatting”, “Strip Css Formatting”, “Strip Font Elements”, “Strip Span Elements”, and “Strip Word Formatting”.. To use this tool, highlight the entire text and try each strip formatting option starting with the bottom. Try the “Strip Word Formatting”, followed by the “Strip Span Elements”, then the “Strip Font Elements”. After using these three options, most formatting conflicts from external documents are resolved.
Section 3: PREP Definitions

PREP – Program Review provides an online solution for internal program review organization and management for all types of programs.

3.1: Definitions and Terminology

• **Program** This is the term that we will use to refer to any academic, administrative or service program/unit/department within our institution.

• **Document Directory** Area to store existing documents (MS Word, Excel, PDF, etc.) that might be referenced from multiple different locations within the same report. Each program has their own document directory.

• **Report** This is the program review process – each program will have their own report with requirement items to complete.

• **Requirement**

These are the items that are listed in each program review report to be completed by your program faculty, department chairs or coordinators. Individual report requirements contain program specific data and tables for programs to review and write narratives.

• **Reviewer’s Comments** Assigned by a supervisor or program review manager to the requirements contained within a report to indicate a program’s compliance with that requirement item. The comments will also be made by the College’s Dean.

• **Status** Each report requirement will have a status field to indicate the current progression of that item such as “in process”, “completed” or “overdue”.

• **Site Administrator**

This is the highest permission level within the site. If a user has been given site administrator access, then he or she is able to view all areas of the site, customize site settings, create and edit the institutional structure and organizational units, manage and modify user accounts and permissions. Users can also be given administrator access for certain items within the site or for entire reports. They will have the highest level of permissions within those items, but still may not be able to access all areas of the site unless they are a Site Administrator.
**Administrator** Users can be given administrator access for certain items within the site or for entire reports. An administrator for a particular requirement has Contributor permissions plus the ability to manage the permissions for the requirement. An administrator of a report has the administrator permission for all requirements within that report. An administrator of a particular item still may not have full access to all areas of the site unless they are a Site Administrator.

- **Contributor**

  This permission enables the user to have viewing and editing access for that item. However, remember that a site administrator can restrict which data type fields contributors are allowed to view and edit. For instance, if you only want administrators to be able to edit titles, contributors and viewers can be prevented from editing that field. Contributors do not have access to edit permissions.

- **Reviewer**

  This is a view only permission. The user can see the item, but cannot edit it. Remember that site administrators can restrict which fields the reviewer can access.