

# User Guide for Xitracs™ Faculty Credentials Module

THE UNIVERSITY OF WEST FLORIDA  
OFFICE OF INSTITUTIONAL EFFECTIVENESS

Welcome to Xitracs™!

Xitracs™ is a web-based system the University of West Florida uses for managing accreditation, compliance reporting, and faculty and staff qualifications. This User Guide pertains only to the Faculty Credentials module used for managing faculty and staff qualifications.

While the overall goal of documenting faculty and staff qualifications at UWF remains the same, the Xitracs™ software will have a different look and feel than the previous system known as FACS. Xitracs™ contains many of the same features as FACS, however, how to use and find these features will be understandably different.

The purpose of this User Guide is to serve as a reference manual to those responsible for entering faculty credentials and qualifications in Xitracs™ once training is completed. However, the Office of Institutional Effectiveness will serve as your local support for this software and will be available to answer questions regarding use of the system.

Thank you for your thoughtful and enthusiastic assistance in implementing this new system and for all that you do for the university community.

Version History

2019 edition

2020 edition – v. 2 Updated April 29, 2020

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## Logging in to Xitracs™

To access Xitracs™, type this link  
<https://uwf.Xitracs.net/accredit/logon.jsp>  
 into browser search bar.\*

Find [Logon](#) using CAS Authentication and click  
[Logon](#)

*\*You may wish to bookmark this page or make a shortcut  
 on your desktop.*



Please logon below

User id:

Password:

Logon

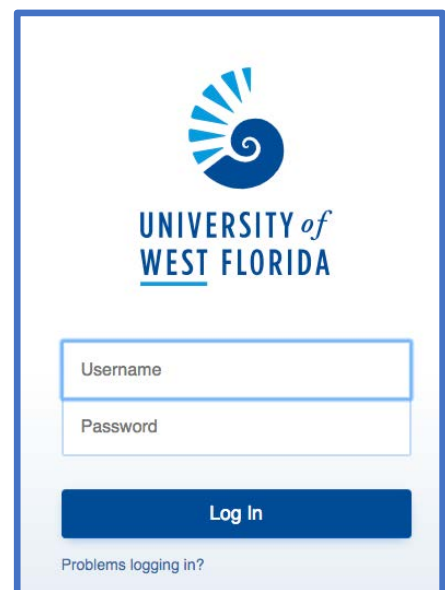
[Logon using CAS Authentication](#)

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Click this link to use your UWF credentials to log on to Xitracs

That will bring up the familiar UWF login screen where  
 you can log in to Xitracs™ using your UWF Credentials



UNIVERSITY of  
 WEST FLORIDA

Username

Password

Log In

Problems logging in?

## Faculty Profile

Each faculty member at UWF will have a Faculty Profile in Xitracs™ Faculty Credentials module. The Faculty Profile is where educational credentials and qualifications are entered, updated, and managed.

## Searching for Faculty Profiles in Xitracs™

To be able to view or edit faculty credentials, you must first be in the **Credentials** module of Xitracs™.

From the Xitracs™ main page, select **Credentials** from the drop-down list at the far right of the menu bar as shown in the image below.



The screenshot displays the Xitracs™ main page for a user named Darby Lamb. The page features a top navigation bar with the following menu items: HOME, AGENCIES, PROJECTS, CALENDAR, LIBRARY, REPORTS, and CONTROL PANEL. A dropdown menu is open on the right side of the navigation bar, listing the following options: STANDARDS, CREDENTIALS (highlighted with a red circle), PLANNING, PROGRAMS, ASSESSMENT, and ADMINISTRATION. The main content area is divided into several sections: Announcements (No announcements currently available), Calendar (Wednesday, 18 September 2019), My Notes (Dean's Administrators Group - Users), Xitracs News (No news currently available), and My Recent Activity (SACSCOC-SYINT - II-D2).

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

## Find Faculty Profile by Name, ID, or Email

Once the Search screen appears, you will see the heading:

### 'Search for a faculty or staff member'

The default selection is **Last Name**, but you may also search by **First Name**, **ID** (UWF ID), or **Email**.

As shown in the screenshot below, you may search by individual faculty information or scroll through various lists including "List all," "List by department," or "List by school." (Note: In this case, List by school is means the same as List by college.) The following pages will offer additional detail on searching by list.

The screenshot shows the 'Faculty & Staff' search interface. At the top is a navigation bar with links: HOME, FACULTY & STAFF, LIBRARY, DEPARTMENTS, SCHOOLS, CIP CODES, REPORTS, CONTROL PANEL, and CREDENTIALS. The main heading is 'Faculty & Staff' with a help icon and a back arrow. Below the heading is a search section titled 'Search for a faculty or staff member'. It includes radio buttons for 'Last Name', 'First Name', 'Id', and 'Email'. A text input field is provided for the search term. A red callout points to this field with the text: 'Search for individual by name or other identifier'. Below the search field are dropdown menus for 'Discipline', 'Location', 'Status', and 'User type', each with a 'Select an optional filter\*' label. 'Search' and 'Clear' buttons are at the bottom of the filter section. A note below the filters reads: '\*Leave search term blank to return all matching data for the selected filter'. Three red callouts point to the filter options: 'List all' (with callout: 'Brings up a list of all faculty imported by department'), 'List by department' (with callout: 'Brings up a list of all faculty imported by department'), and 'List by school' (with callout: 'Brings up a list of all faculty imported by college').

## Alternate Ways to Find Faculty Profiles in Xitracs™

You may also search display lists of Faculty. The options you see include:

- **List all** (gives an entire listing of faculty in the Xitracs™ system)
- **List by department**
- **List by school** (UWF uses this feature to list by College)

### Find Faculty Profiles by College (“School”)

Under **Function** heading, click [Faculty & Staff](#) to bring up college faculty names.

The screenshot displays the Xitracs™ Faculty & Staff module. The navigation menu at the top includes: HOME, FACULTY & STAFF, LIBRARY, DEPARTMENTS, SCHOOLS, CIP CODES, REPORTS, CONTROL PANEL, and CREDENTIALS. The 'FACULTY & STAFF' menu item is highlighted. Below the menu, the page title is 'Faculty & Staff'. On the left side, there is a search section for faculty or staff members, with options to search by Last Name, First Name, Id, or Email. Below the search box are filters for Discipline, Location, Status, and User type. A 'Search' button and a 'Clear' button are also present. A note below the filters states: '\*Leave search term blank to return all matching data for the selected filter(s)'. Below the note are three links: 'List all', 'List by department', and 'List by school'. On the right side, there is a table with three columns: School Name, Description, and Function. The table contains the following data:

School Name	Description	Function
Academic Engagement	Academic Engagement	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
Col of Arts, Soc Sci and Human	College of Arts, Social Sciences, and Humanities	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
College of Business	College of Business	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
College of Ed and Prof Studies	College of Education and Professional Studies	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
College of Health	Usha Kundu, MD College of Health	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
College of Sci and Engineering	Hal Marcus College of Science and Engineering	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
No College Designated	No College Designated	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
University of West Florida	Institution	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>
Used in Academic Standing	Used in Academic Standing	<a href="#">Departments</a> <a href="#">Faculty &amp; Staff</a>



The resulting list is displayed by college in alphabetical order. Click on **Details** by any faculty member to get into the *Faculty Profile*.

The screenshot displays the 'Faculty & Staff' page. The navigation bar includes links for HOME, FACULTY & STAFF (highlighted), LIBRARY, DEPARTMENTS, SCHOOLS, CIP CODES, REPORTS, CONTROL PANEL, and CREDENTIALS. The page title is 'Faculty & Staff'. Below the title, there is a 'Return to Search' link and a 'Return to Department list' link. The main content area is titled 'School Faculty & Staff Listing' and shows a list of faculty members for the 'College of Health'. A red callout box points to the list with the text 'All faculty imported for the college'.

Faculty Name	Details
Adams, Brianna	<a href="#">Details</a>
Adlof, Lauren	<a href="#">Details</a>
Alexander, Michelle	<a href="#">Details</a>
Allen, John	<a href="#">Details</a>
Ambler, Steven	<a href="#">Details</a>
Arruda, James	<a href="#">Details</a>

## Find Faculty Profile by Department

Under **Function** heading, click [Departments](#) to bring up department

The screenshot shows the 'Faculty & Staff' search interface. On the left, there is a search box with radio buttons for 'Last Name', 'First Name', 'Id', and 'Email'. Below the search box are filters for 'Discipline', 'Location', 'Status', and 'User type', each with a dropdown menu. There are 'Search' and 'Clear' buttons. A note below the filters reads: '\*Leave search term blank to return all matching data for the selected filter(s)'. Below the note are links for 'List all', 'List by department', and 'List by school'. On the right, a table lists departments with columns for 'Department Name', 'Description', 'School', and 'Function'. A red callout bubble points to the 'Function' column, containing the text 'All departments in a college'.

Department Name	Description	School	Function
Exercise Sci & Community Hlth	Exercise Science and Community Health	College of Health	<a href="#">Faculty &amp; Staff</a>
Health Sciences & Admin	Health Sciences and Administration	College of Health	<a href="#">Faculty &amp; Staff</a>
Medical Lab Sciences	Medical Laboratory Sciences	College of Health	<a href="#">Faculty &amp; Staff</a>
Nursing	School of Nursing	College of Health	<a href="#">Faculty &amp; Staff</a>
Psychology	Psychology	College of Health	<a href="#">Faculty &amp; Staff</a>
Public Health	Public Health	College of Health	<a href="#">Faculty &amp; Staff</a>

-OR-

Under **Function** heading, click [Faculty & Staff](#) to bring up all faculty names in the department.

The screenshot shows the 'Faculty & Staff' listing interface for the 'Medical Lab Sciences' department. On the left, there is a navigation frame with a 'Return to Search' link and a 'Department Faculty & Staff Listing' section for 'Medical Lab Sciences'. Below this, a list of faculty members is shown with their names and 'Details' links. On the right, there is a 'Return to Department list' link and a message: 'This is the starting page for viewing or editing faculty & staff information. Use the navigation frame on the left to select a faculty or staff member'. A red callout bubble points to the faculty list, containing the text 'All faculty imported by department'.

Behan, Kristina	<a href="#">Details</a>
Besozzi, Michael	<a href="#">Details</a>
Cavnar, Katie	<a href="#">Details</a>
Coffey, Kristen	<a href="#">Details</a>
Flaniken, Laura	<a href="#">Details</a>
Ford, Jenny	<a href="#">Details</a>
Promo, Michele	<a href="#">Details</a>

## Faculty Profile List by Department

Faculty & Staff

Search for a faculty or staff member

Last Name
  First Name
  Id
  Email

Select an optional filter\*

Discipline:

Location:

Status:

User type:

Search Clear

\*Leave search term blank to display all matching data for the search

[List all](#)

[List by department](#)

[List by school](#)

Department Name	Description	School	Function
Academic Classroom	Academic Classroom	No College Designated	<a href="#">Faculty &amp; Staff</a>
Accounting & Finance	Accounting and Finance	College of Business	<a href="#">Faculty &amp; Staff</a>
Administration and Law	Administration and Law	College of Ed and Prof Studies	<a href="#">Faculty &amp; Staff</a>
Air Force	Aerospace Studies - Air Force ROTC	College of Ed and Prof Studies	<a href="#">Faculty &amp; Staff</a>
Anthropology	Anthropology	Col of Arts, Soc Sci and Human	<a href="#">Faculty &amp; Staff</a>
Art	Art	Col of Arts, Soc Sci and Human	<a href="#">Faculty &amp; Staff</a>
Arts, SS, and Hum, General	College of Arts, Social Sciences, and Humanities	Col of Arts, Soc Sci and Human	<a href="#">Faculty &amp; Staff</a>
Biology	Biology	College of Sci and Engineering	<a href="#">Faculty &amp; Staff</a>
Business Admin, General	College of Business	College of Business	<a href="#">Faculty &amp; Staff</a>
Business, Dean	College of Business Deans Office	College of Business	<a href="#">Faculty &amp; Staff</a>
Chemistry	Chemistry	College of Sci and Engineering	<a href="#">Faculty &amp; Staff</a>
Communication	Communication	Col of Arts, Soc Sci and Human	<a href="#">Faculty &amp; Staff</a>
Computer Science	Computer Science	College of Sci and Engineering	<a href="#">Faculty &amp; Staff</a>
Continuing Education	Division of Continuing Education	No College Designated	<a href="#">Faculty &amp; Staff</a>

Under **Function** heading, select Faculty & Staff to bring up all faculty in department -OR\_

Return to [Search](#)

**Department Faculty & Staff Listing**

Medical Lab Sciences

Behan, Kristina	<a href="#">Details</a>
Besozzi, Michael	<a href="#">Details</a>
Cavnar, Katie	<a href="#">Details</a>
Coffey, Kristen	<a href="#">Details</a>
Flaniken, Laura	<a href="#">Details</a>
Ford, Jenny	<a href="#">Details</a>
Promo, Michele	<a href="#">Details</a>

Select [List by department](#) to bring up all departments at UWF

## Updating Faculty Profiles

Faculty profiles in Xitracs™ are divided into five tabs or sections. These tabs include:

- Base data
- Qualifications
- Courses
- Documents
- \* Feedback (Only visible once the Faculty Member has submitted Feedback)

### Base Data tab

The **Base data** tab contains basic information regarding the faculty member to include:

- Faculty Rank,
- Employment Status (known as **Faculty teaching status**),
- Tenure Status,
- Highest Degree Earned,
- Job Title,
- Roles, etc.

Some fields may not be used such as Graduate Faculty, or CV URL. The following pages describe how to complete the sections of the **Base data** section of the Faculty Profile.

The **Base Data** tab is shown in the figure below:

The screenshot shows the Xitracs interface for the University of West Florida. The user is logged in as Darby Lamb. The navigation menu includes: HOME, FACULTY & STAFF, FILE-Q™, LIBRARY, DEPARTMENTS, SCHOOLS, CIP CODES, REPORTS, CONTROL PANEL, and CREDENTIALS. The 'Faculty & Staff' section is active, showing a search results list with 'Lamb, Graham' selected. The profile for Mr. Graham Darby Lamb (ID: 970559508) is displayed. The 'Base data' tab is selected and highlighted in yellow. A red arrow points to this tab. A green box with text 'Four tabs: Base data, Qualifications, Courses, Documents' is overlaid on the page. The profile information includes: Name: Mr. Graham Darby Lamb (970559508), Department: English [EF], School: Col of Arts, Soc Sci and Human, Status: Full Time, Type: Faculty and Staff, and Information status: Not specified. Below this, there are two tables: 'Base Data' and 'Position Details', each with columns for the field name, current value, and an 'Edit' or 'Assign role' button.

Base Data		Function
Faculty Rank	Not specified	Edit
Tenure Status	Not specified	Edit
Graduate Faculty	Not specified	Edit
Highest Degree Earned	Not specified	Edit
CV Online	No	Upload Library
Transcript Online	No	Upload Library
Evaluation Online	No	Upload Library

Position Details		Function
Job Title		Edit
Job Description		Edit
Description document	No	Upload Library
Roles		Assign role

### Faculty Rank

For **Faculty Rank**, your choices include those shown in the figure. Please select the one that applies currently to the faculty member.

A screenshot of a dropdown menu titled "Faculty Rank". The menu is open, showing a list of options: Adjunct, Assistant Professor, Associate Professor, Instructor, Lecturer, Professor, and Visiting. The "Adjunct" option is currently selected and highlighted in blue.

### Employment Status

**Employment Status** refers to **Faculty Teaching Status**. As faculty are imported into Xitracs™ from Banner, the default status is "Active." Please change to either **Full-time** or **Part-time** as appropriate. Please do *not* select Temporary or Active.

A screenshot of a dropdown menu titled "Employment Status". The menu is open, showing a list of options: Active, Full time, Part time, and Temporary. The "Full time" option is currently selected and highlighted in blue. A red "ancel" button is visible to the right of the menu.

### Important Note regarding Employment Status:

For UWF full-time administrators that teach the occasional course in your department, please continue to list them as **part-time** for this field. This field is about their *teaching status* in the department and not their employment status with UWF.

### Tenure Status

**Tenure Status** is based on the current faculty member status. It may be left blank for Adjunct faculty or as appropriate.

A screenshot of a dropdown menu titled "Tenure Status". The menu is open, showing a list of options: Non tenured, Tenure Track, and Tenured. The "Non tenured" option is currently selected and highlighted in blue.

### Graduate Faculty Status

The **Graduate Faculty Status** field is optional, however the department may opt to use this field and can mark as appropriate.

### Highest Degree Earned

The **Highest Degree Earned** field references the highest degree earned by this faculty member. Please select **ONLY** the highest degree earned. More detailed information regarding the entirety of the faculty member's credentials are entered on other tabs.

A screenshot of a dropdown menu titled "Highest Degree Earned". The menu is open, showing a list of options: Associate, Bachelors, Certificate, Diploma, Doctorate, Masters, and Specialist. The "Associate" option is currently selected and highlighted in blue. A red "ancel" button is visible to the right of the menu.

### CV On File

This field is optional and notes a paper copy maintained by the college. All faculty members should have a current CV in Xitracs™. Please see the next field to upload the faculty member's CV into Xitracs™.

### CV Online

CVs will be uploaded in another location.

### Transcript Online

Transcripts will be uploaded in another location in Xitracs™.

### Position Details

The Position Details section of the **Base data** tab *can be left blank* or used at the discretion of the department or college at this time.

The screenshot shows the Xitracs™ interface for the University of West Florida. The user is logged in as Darby Lamb. The page displays the Faculty & Staff section for Mr. Graham Darby Lamb (ID: 970559508). The profile includes details such as Department (English [EF]), School (Col of Arts, Soc Sci and Human), Status (Full Time), and Type (Faculty and Staff). The Base Data tab is active, showing fields like Faculty Rank, Tenure Status, Graduate Faculty, Highest Degree Earned, CV Online, Transcript Online, and Evaluation Online. The Position Details and Tasks sections are present but have been crossed out with red lines. A red callout box with the text "For now, do not use the Position Details nor the Tasks sections" is overlaid on the Position Details section.

**Faculty & Staff**

Name: **Mr. Graham Darby Lamb** (970559508) [Roster report](#) [Printer friendly](#)

Department: English [EF] School: Col of Arts, Soc Sci and Human

Status: Full Time Type: Faculty and Staff

Information status: *Not specified*

Base data | Qualifications | Courses | Documents

Base Data		Function
Faculty Rank	<i>Not specified</i>	<a href="#">Edit</a>
Tenure Status	<i>Not specified</i>	<a href="#">Edit</a>
Graduate Faculty	<i>Not specified</i>	<a href="#">Edit</a>
Highest Degree Earned	<i>Not specified</i>	<a href="#">Edit</a>
CV Online	No	<a href="#">Upload Library</a>
Transcript Online	No	<a href="#">Upload Library</a>
Evaluation Online	No	<a href="#">Upload Library</a>
Position Details		Function
<del>Job Title</del>		<del><a href="#">Edit</a></del>
<del>Job Description</del>		<del><a href="#">Edit</a></del>
<del>Description document</del>	No	<del><a href="#">Upload Library</a></del>
<del>Roles</del>		<del><a href="#">Assign role</a></del>
Extended Data		Function
<del>Faculty and Staff Level</del>		<del><a href="#">Edit</a></del>
<del>Upload CV 5</del>		<del><a href="#">Edit</a></del>
Tasks		Function
Priority	Date Created	Detail
		<a href="#">Add new</a>
<i>No tasks found</i>		

For now, do not use the Position Details nor the Tasks sections

## Qualifications tab

There are three sections in the **Qualifications** tab used to describe faculty qualifications:

- **Degree Awards,**
- **Certifications & Licensures,** and
- **Experience and Other Qualifications**

The **Degree Awards** section is where all educational degrees are listed. The following sections outline how to properly identify the degree award and institution.

The **Certifications & Licensures** section may be left blank for many faculty, however, for some faculty this section will need to be completed. Some examples of uses for this section include:

Nursing faculty – include Nursing licensure information

Accounting faculty – include CPA information

Athletic Training faculty – include BOC and licensure information

ABA faculty – include BACB certification information

Social Work faculty – include LCSW information here as appropriate

Other certifications may be listed in this section as appropriate. For guidance on how to enter certification and/or licensure information not listed above, please contact the Office of Institutional Effectiveness.

The **Experience and Other Qualifications** section may be used to list awards or detail other relevant experience.

<b>Name:</b> Mr. Graham Darby Lamb (970559508)		<a href="#">Printer friendly</a>
<b>Department:</b> English [EF]	<b>School:</b> Col of Arts, Soc Sci and Human	
<b>Status:</b> Full Time <b>Type:</b> Faculty and Staff		
Base data	Qualifications	Courses
Documents		
<b>Degree Awards</b>		<b>Function</b>
Type	Detail	<a href="#">Add new</a>
<i>No qualification information found</i>		
<b>Certifications &amp; Licensures</b>		<b>Function</b>
Certification	Detail	<a href="#">Add new</a>
<i>No certification information found</i>		
Licensure	Detail	<a href="#">Add new</a>
<i>No licensure information found</i>		
<b>Experience and Other Qualifications</b>		<b>Function</b>
Type	Detail	<a href="#">Add new</a>
<i>No experience or other qualification information found</i>		

## Degree Awards section

Use this section to add details regarding a faculty member's academic degrees. Start with the **highest degree achieved**.

### To Add an Academic Degree

Select [Add new](#) under Function, and a drop down menu will appear as shown in the figure below to Add New Qualification.

Choose **degree type** from the list as shown. (Note: Do not select Associate degrees or Certificates earned here.)

In the **Name....** field, type in the abbreviation for the degree. For example, Ph.D., Ed.D., M.S., etc. **A complete list of abbreviations is in Appendix A.**

In the **Institution...** field, *type out* the complete name of the Institution name where the degree was earned. For example, University of West Florida. Please do NOT abbreviate the Institution name.

In the **Field...** field, type in the name of the field. For example, Chemistry or Business Administration. Note: This should come directly from the transcript.

In the **Year** field, please type in the year the degree was awarded. Please use the 4-digit year. For example, 2011.

Click **Submit**.

**Note: This process can be repeated multiple times to enter all academic degrees earned by a faculty member.**



## Certifications & Licensures section

Use this section to add details regarding a faculty member's certifications and/or licensure information as it relates to their teaching assignments.

### *To add a Certificate*

Select [Add new](#) under Function, and a drop down menu will appear as shown in the figure Add Certificate.

In the **Name...** field, type in the name of the certificate. For example, Security+ or Professional in Human Resources.

In the **Institution...** field, type in the name of the organization or institution that issued the certificate as appropriate. For example, CompTIA for the Security+ certificate.

In the **Field...** field, if appropriate type in the field the certificate was earned. For example, Information Technology for the Security+. This field can be left blank.

In the **Date** fields, enter the issue date and/or expiration date as appropriate.

The **Year** field is optional, and may be used if the certificate doesn't have issue/expiration dates.

If you are able to upload a certificate transcript, check the **Transcript on file:** box.

Click **Submit**.

The screenshot shows the 'Add Certificate' form with the following fields and options:

- Name...**: Text input field.
- Institution...**: Text input field.
- Field...**: Text input field.
- Date pickers**: Issue date (9 Apr 2019) and Expiration date (9 Apr 2019).
- Year**: Text input field.
- Transcript on file:**
- Submit** and **Cancel** buttons.

This is an identical screenshot of the 'Add Certificate' form as described above.

## To add a License

Select [Add new](#) under Function, and a drop-down menu will appear as shown in the figure Add License.

In the **Name...** field, type in the name of the license. For example, Registered Nurse.

In the **Institution...** field, type in the name of the organization or institution that issued the certificate as appropriate. For example, State of Florida Department of Health for the Registered Nurse license.

In the **Field...** field, if appropriate type in the field the certificate was earned. For example, Nursing for the Registered Nurse license. This field can be left blank.

In the **Date** fields, enter the issue date and/or expiration date as appropriate.

If you have a copy of the license on file, check the **Transcript on file:** box.

Click **Submit**.

*Copies of certifications and licenses can be uploaded on the Documents tab.*

## Experience & Other Qualifications section

Use this section to add details regarding a faculty member's awards, publications, memberships, and enter a justification narrative outlining other evidence to demonstrate the faculty is qualified to teach a particular course(s).

### To add an Award

Select [Add new](#) under Function, and a drop down menu will appear as shown in the figure Add Experience & Other Qualifications.

Select **Award** from the drop down menu.

In the **Name...** field, type in the name of the Award.  
Example: SGA Distinguished Teaching Award.

In the **Institution...** field, enter the name of the Institution that conferred the award as appropriate. Example: University of West Florida.

Complete the **Date** fields as appropriate.

If you have a copy of the award on file, check the **Transcript on file:** box.

Click **Submit**.

### To add a Justification

Select [Add new](#) under Function, and a drop down menu will appear as shown in the figure Add Experience & Other Qualifications.

Select **Justification Narrative** from the drop down menu.

In the **Name...** field, backspace over Name.... to make the field blank.

In the **Institution...** field, backspace over Institution... to make the field blank.

In the blank comment box, type in the justification narrative. This narrative should be provided by the department chair.

In the **Date** field, enter the effective date. This date should be the start date of the current term. It is not necessary to enter an expiration date.

It is not necessary to enter data in the Year fields or check Transcript on file:.

Click **Submit**.

### ***Note about GTAs and Justifications***

All GTAs should have a justification prepared that includes a listing of the 18 graduate semester credit hours they have completed, even if the transcript has been uploaded into Xitracs as a document. Reviewers will expect to see the 18 graduate semester credit hours listed in detail on the roster, so the courses the GTA has completed need to be listed in the justification so that they will appear on the roster. Please list the course using the following format:

EGN 6420 Principles of Engineering Analysis 3 SCH  
EEL 5226 Power System Operations and Control 3 SCH  
EEL 5262 Smart Distribution System 3 SCH  
EEL 6245 Power Electronics and Utility Applications 3 SCH  
EEL 5616 Advanced Control Systems 3 SCH  
EML 6805 Engineering Foundations for Robotics 3 SCH

## **Courses tab**

Courses are imported from Banner each semester. You will not need to enter courses.

## **Documents tab**

Use this section to add upload documents related to a faculty member's qualifications. Evaluations, transcripts, CVs, certifications, and licenses will be uploaded on this tab.

There are four sections in the Documents tab:

- General Documents,
- Qualification Documents
- Certifications & Licensure Documents, and
- Experience and Other Qualification Documents

## General Documents section

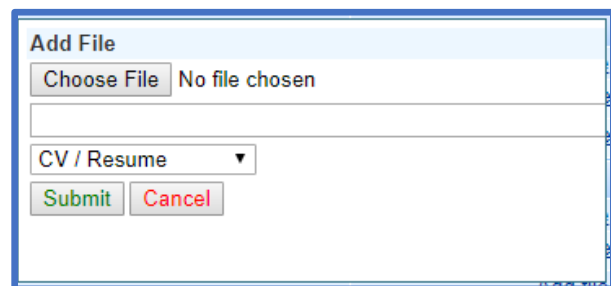
The General Documents section is where evaluations can be stored. For those departments that used the FACS system for evaluations, prior year evaluations have been exported as PDFs from FACS and are already associated with the faculty member profile in Xitracs™. These prior year evaluations should be visible for viewing in this section.

For departments wishing to store prior year evaluations in Xitracs™ that are stored somewhere other than FACS, please contact the Office of Institutional Effectiveness to determine a plan for importing prior year evaluations.

### Uploading an Evaluation file

Select [Add file](#) under Function, and a small window will appear as shown in the figure to **Add File**.

Click **Choose File** and window will open for you to locate the evaluation file you wish to upload on your computer. Once you locate the file, select it and click **Open**.

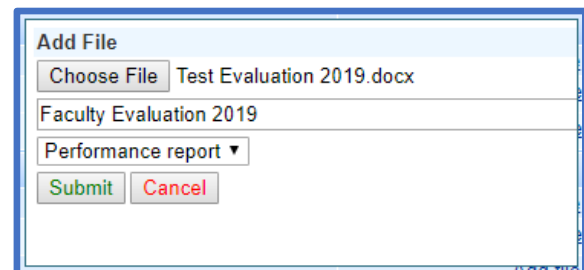


The screenshot shows a dialog box titled "Add File". At the top left is a "Choose File" button. To its right is a text field containing "No file chosen". Below this is a dropdown menu currently showing "CV / Resume". At the bottom are two buttons: "Submit" (green) and "Cancel" (red).

In the blank field below Choose File, type in *Faculty Evaluation 20XX* (use the appropriate year).

In the dropdown list below this field, change the default to **Performance Report** as shown in the figure.

Click **Submit**.

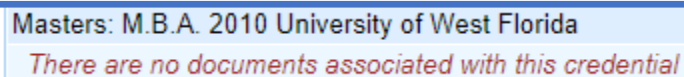


The screenshot shows the "Add File" dialog box after a file has been selected. The "Choose File" button is now disabled. The text field contains "Test Evaluation 2019.docx". Below the text field, the text "Faculty Evaluation 2019" is visible. The dropdown menu is now set to "Performance report". The "Submit" and "Cancel" buttons remain at the bottom.

## Qualification Documents section

The Qualification Documents section is where academic transcripts are stored and accessed in Xitracs™.

For all academic degrees entered on the Qualifications tab, you will see all these same degrees listed under Qualification Documents. *Until transcripts are uploaded and associated with these degrees, you will see the following note in red, 'There are no documents associated with this credential,' as shown in the figure below.*



Masters: M.B.A. 2010 University of West Florida  
*There are no documents associated with this credential*

It is important to note that **before a transcript is uploaded into Xitracs™, the faculty member's social security number should be redacted from every page of the transcript.** Guidance on redaction is offered in Appendix B of this document.

### Uploading a transcript

Select [Add file](#) next to the academic degree **that you are uploading** the transcript, and a small window will appear as shown in the figure to **Add File**.

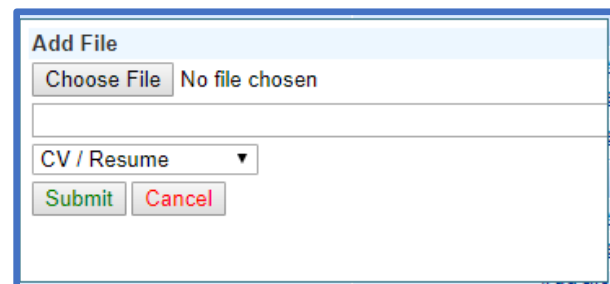
Click **Choose File** and window will open for you to locate the transcript file you wish to upload on your computer. Once you locate the file, select it and click **Open**.

Note: The Naming Convention for transcript files is shown in Appendix C.

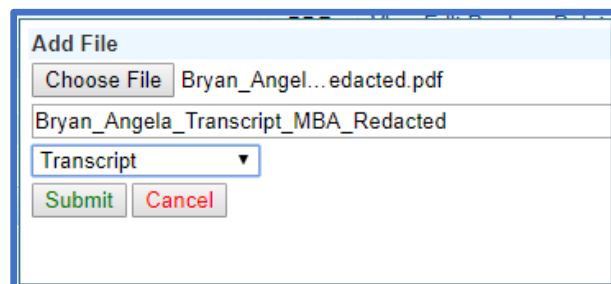
The field below **Choose File** will default to the filename.

In the dropdown shown under the filename, change the default setting from CV/Resume to **Transcript**.

Click **Submit**.



Add File  
Choose File No file chosen  
CV / Resume  
Submit Cancel

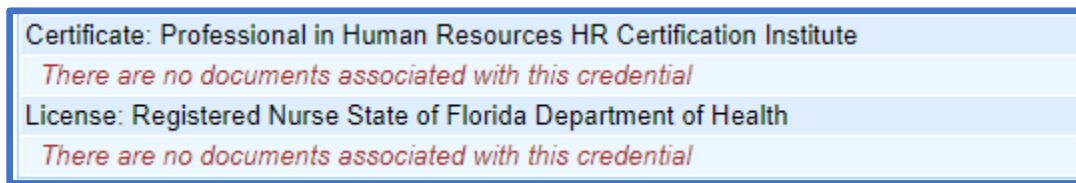


Add File  
Choose File Bryan\_Angel... edacted.pdf  
Bryan\_Angela\_Transcript\_MBA\_Redacted  
Transcript  
Submit Cancel

## Certification & Licensure Documents section

The Certification & Licensure Documents section is where electronic and/or scanned copies of relevant certifications and licenses are stored and accessed in Xitracs™.

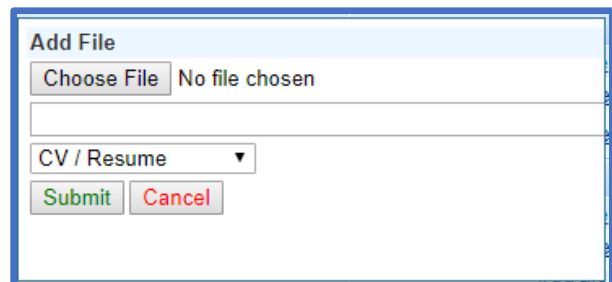
For all certifications and licenses entered on the Qualifications tab, you will see all these same certifications and licenses listed under Qualification Documents. *Until electronic copies of certifications and licenses are uploaded and associated with these credentials, you will see the following note in red, 'There are no documents associated with this credential,' as shown in the figure below.*



### Uploading a Certification

Select [Add file](#) next to the certification that **you are uploading** the electronic copy, and a small window will appear as shown in the figure to **Add File**.

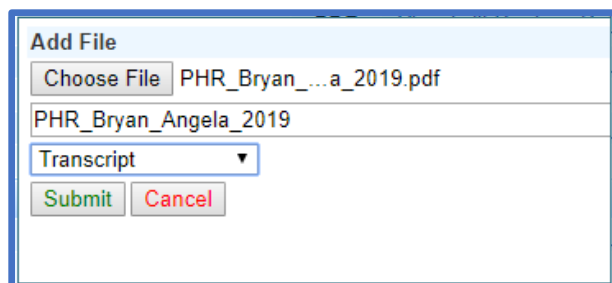
Click **Choose File** and window will open for you to locate the certification file you wish to upload on your computer. Once you locate the file, select it and click **Open**.



The field below **Choose File** will default to the filename.

In the dropdown shown under the filename, change the default setting from CV/Resume to **Transcript**.

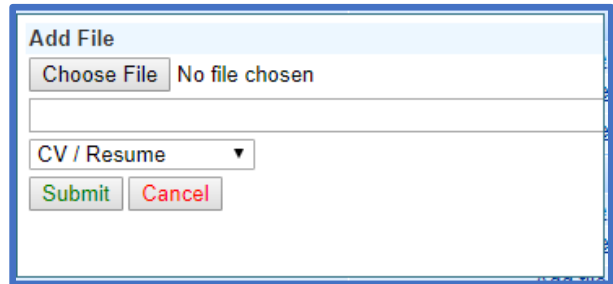
Click **Submit**.



## Uploading a License

Select [Add file](#) next to the license that you are **uploading** the electronic copy, and a small window will appear as shown in the figure to **Add File**.

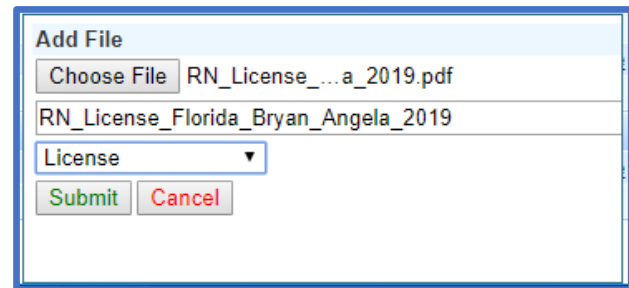
Click **Choose File** and window will open for you to locate the certification file you wish to upload on your computer. Once you locate the file, select it and click **Open**.



The field below **Choose File** will default to the filename.

In the dropdown shown under the filename, change the default setting from CV/Resume to **License**.

Click **Submit**.



## Experience and Other Qualification Documents

This section can be used to upload copies of awards or other documents relevant to faculty qualifications the department wishes to store in Xitracs™. The document upload instructions are the same as in previous sections.



## Feedback Tab

This tab will only be available when the Faculty Member has submitted Feedback thru the ***Xitracs Portal***.

Use this section to review a Faculty Member's feedback from the Portal. This is also where you will review, save and attach documents sent from the Faculty Member thru the Portal. Transcripts, CVs, Certifications, and Licenses are some of the documents that could be sent thru the Feedback Tab.

### Reviewing Faculty Feedback

If the Faculty Member is simply notifying you of information that is incorrect or needs to be updated, you will see that listed in the Feedback Detail Column. Review that information and update the Faculty Member's Profile if needed. This could be a Name Change, Tenure Status Change, or if information is incorrect on their Profile.

**Name:** [Mr. Graham Darby Lamb](#) [Printer friendly](#)

**Department:** History [HIS]      **School:** Col of Arts, Soc Sci and Human

**Status:** Full Time    **Type:** Faculty and Staff

[Base data](#)   [Qualifications](#)   [Courses](#)   [Documents](#)   [Feedback](#)

**Found 3 items**




	Source	Created	Feedback Detail	Function
<input type="checkbox"/>	Base data CV Online	8/8/19 4:26 PM	<i>Here is my current CV.</i>	<a href="#">Respond</a>
			LambD_Resume_042919.pdf    PDF 263 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/>	Base data Transcript online	7/26/19 2:51 PM	<i>here is my masters transcript</i>	<a href="#">Respond</a>
			dlamb_Tran_M_2008.pdf    PDF 307 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/>	Base data Transcript online	7/26/19 2:33 PM	<i>Here is my Transcript</i>	<a href="#">Respond</a>
			DSU Transcript_Redacted_Cleaned.pdf    PDF 1,011 KB	<a href="#">Copy</a> <a href="#">View</a>

*To delete a feedback item, check the box next to the item and click the button below.*




If Documents are received thru the Feedback Tab, you will need to review the document, save the document with the correct Naming Convention, and in some instances attach that file to a specific Qualification. The steps for reviewing, saving and attaching documents to a Faculty member's profile are listed below.

## Reviewing Documents Received from the Feedback Tab

Select [View](#) to the right of a document.

Source	Created	Feedback Detail	Function
<input type="checkbox"/> Base data CV Online	8/8/19 4:26 PM	Here is my current CV.	<a href="#">Respond</a>
		 LambD_Resume_042919.pdf PDF 263 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/> Base data Transcript online	7/26/19 2:51 PM	here is my masters transcript	<a href="#">Respond</a>
		 dlamb_Tran_M_2008.pdf PDF 307 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/> Base data Transcript online	7/26/19 2:33 PM	Here is my Transcript	<a href="#">Respond</a>
		 DSU Transcript_Redacted_Cleaned.pdf PDF 1,011 KB	<a href="#">Copy</a> <a href="#">View</a>

The Document will open in a New Tab for you to review. Once you have reviewed the document, return to the Xitracs™ Tab, and select [Copy](#).

Source	Created	Feedback Detail	Function
<input type="checkbox"/> Base data CV Online	8/8/19 4:26 PM	Here is my current CV.	<a href="#">Respond</a>
		 LambD_Resume_042919.pdf PDF 263 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/> Base data Transcript online	7/26/19 2:51 PM	here is my masters transcript	<a href="#">Respond</a>
		 dlamb_Tran_M_2008.pdf PDF 307 KB	<a href="#">Copy</a> <a href="#">View</a>
<input type="checkbox"/> Base data Transcript online	7/26/19 2:33 PM	Here is my Transcript	<a href="#">Respond</a>
		 DSU Transcript_Redacted_Cleaned.pdf PDF 1,011 KB	<a href="#">Copy</a> <a href="#">View</a>

A window will pop-up to allow you to save the document.

Review the name of the submitted document. If the document name does not follow the established naming convention, change it on this screen at this time.

The screenshot shows a document upload window with the following fields and options:

- File:** LambD\_Resume\_042919.pdf 263 KB 8/8/19
- Name:** LambD\_Resume\_042919.pdf
- Type:** CV / Resume (dropdown menu)
- Copy to:**
  - General documents
  - CV
  - Transcript (base data)
  - The following credential:

Below the 'Copy to' section, there are three expandable sections:

- Qualification Documents:**
  - Masters: Higher Education 2008 University of Mississippi
  - Bachelors: DLamb\_Tran\_B 2006 Delta State University
- Certification & Licensure Documents:**
  - No certification or licensure information found
- Experience and Other Qualification Documents:**
  - No experience or other qualification information found

Select the [Type](#) drop-down menu and select **the appropriate document type**.

The close-up shows the 'Type' dropdown menu with the following options:

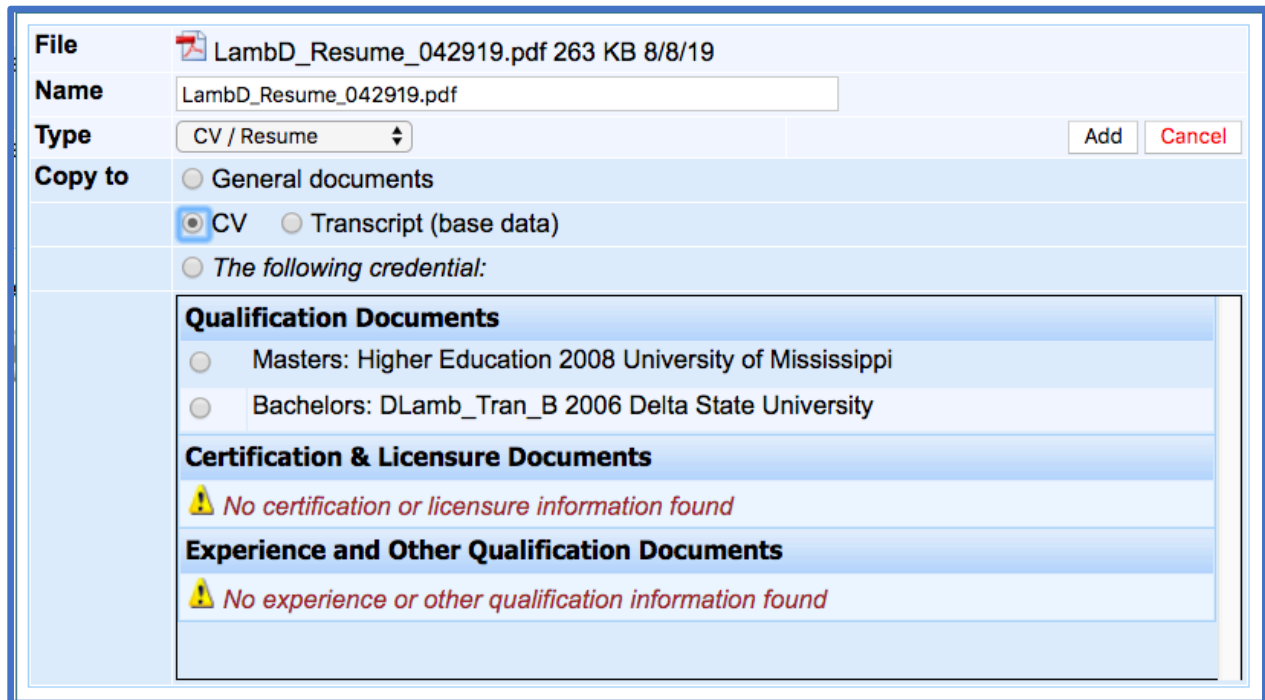
- ✓ CV / Resume
- Job Description
- License
- Performance report
- Publication
- Recommendation
- Transcript

If the document needs to be Copied or Attached to a Qualification you can do so by selecting the correct Radio Button for the Qualification. You can select one of the following options:

- General documents**
- CV**
- Transcript (base data)**

You will also have the option to ***select other qualifications*** that have been entered for the faculty member.

For example, Transcripts can be connected to Degrees entered under the Faculty Member's Qualifications Tab by ***selecting the radio button next to the Degree***.



The screenshot shows a file upload dialog box with the following fields and options:

- File:** LambD\_Resume\_042919.pdf 263 KB 8/8/19
- Name:** LambD\_Resume\_042919.pdf
- Type:** CV / Resume (dropdown menu)
- Copy to:** Radio buttons for General documents, CV (selected), Transcript (base data), and The following credential:
- Qualification Documents:** Radio buttons for Masters: Higher Education 2008 University of Mississippi and Bachelors: DLamb\_Tran\_B 2006 Delta State University.
- Certification & Licensure Documents:** A warning icon and text: "No certification or licensure information found".
- Experience and Other Qualification Documents:** A warning icon and text: "No experience or other qualification information found".

Buttons for "Add" and "Cancel" are visible next to the Type dropdown.

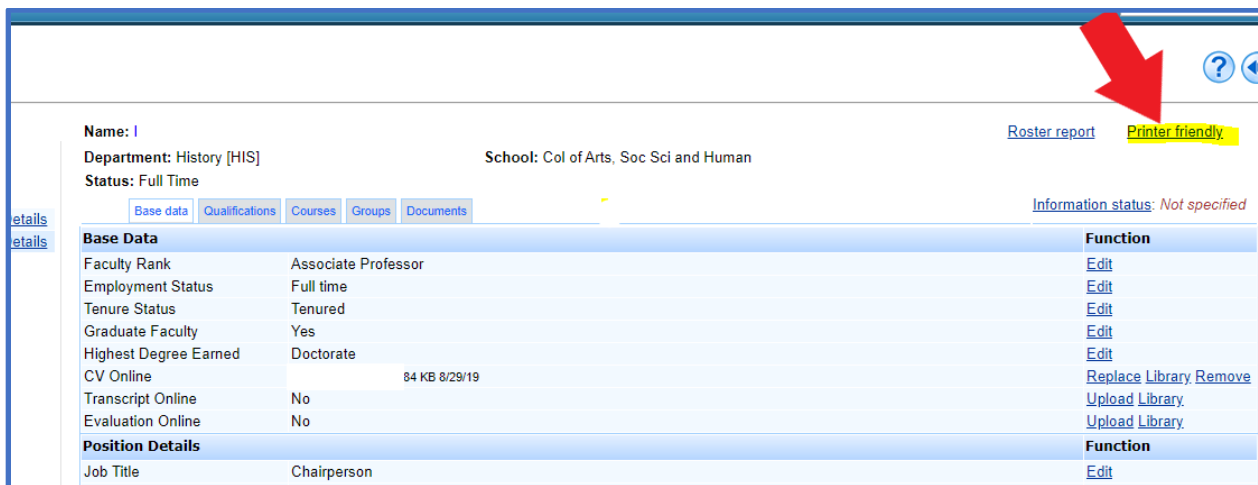
After selecting the correct Copy to location, click [Add](#).

## Faculty Report (*replacement for SACSCOC form*)

The Faculty Report is the Xitracs document that replaces the SACSCOC Form available through UWF's previous system for faculty credentialing known as FACS. This Faculty Report can be saved as a pdf or printed to printer from the screen below.

First, you will need to locate the faculty member's profile. Use the 'Search for a faculty or staff member' as outlined in the [instructions on page 6 of this document](#).

Once you have located the faculty member's Faculty Profile in Xitracs, select the option **Printer friendly** in the upper right-hand corner of the screen as shown below.



Name: I [Roster report](#) [Printer friendly](#)

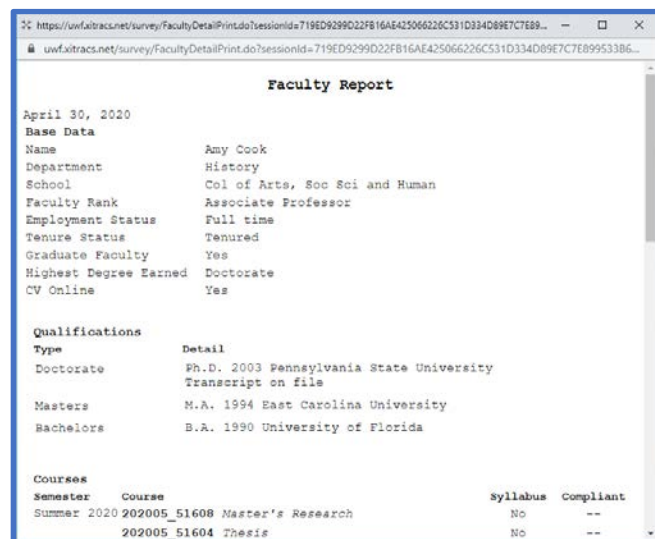
Department: History [HIS] School: Col of Arts, Soc Sci and Human

Status: Full Time Information status: Not specified

[Base data](#) [Qualifications](#) [Courses](#) [Groups](#) [Documents](#)

Base Data		Function
Faculty Rank	Associate Professor	<a href="#">Edit</a>
Employment Status	Full time	<a href="#">Edit</a>
Tenure Status	Tenured	<a href="#">Edit</a>
Graduate Faculty	Yes	<a href="#">Edit</a>
Highest Degree Earned	Doctorate	<a href="#">Edit</a>
CV Online	84 KB 8/29/19	<a href="#">Replace Library</a> <a href="#">Remove</a>
Transcript Online	No	<a href="#">Upload Library</a>
Evaluation Online	No	<a href="#">Upload Library</a>
Position Details		Function
Job Title	Chairperson	<a href="#">Edit</a>

The Faculty Report will appear in a pop-up window as shown below. **Right click** on the window to have a print option (this works in Google Chrome). The Faculty Report can be saved as a pdf or printed a printer for a hard copy.



Faculty Report

April 30, 2020

**Base Data**

Name Amy Cook  
 Department History  
 School Col of Arts, Soc Sci and Human  
 Faculty Rank Associate Professor  
 Employment Status Full time  
 Tenure Status Tenured  
 Graduate Faculty Yes  
 Highest Degree Earned Doctorate  
 CV Online Yes

**Qualifications**

Type	Detail
Doctorate	Ph.D. 2003 Pennsylvania State University Transcript on file
Masters	M.A. 1994 East Carolina University
Bachelors	B.A. 1990 University of Florida

**Courses**

Semester	Course	Syllabus	Compliant
Summer 2020	202005_51608 Master's Research	No	--
	202005_51604 Thesis	No	--

## Faculty Rosters

Xitracs will allow you to prepare a faculty roster that can be saved and/or printed at a variety of levels (department, school/college, and university). The following section provides detail on preparing a faculty roster for paper or electronic format.

### Printing a Faculty Roster

To print a faculty roster, you must first be in the **Credentials** module of Xitracs™.

Once in the **Credentials** module, select **Reports** from the top menu bar.

The screenshot shows the Xitracs interface for the University of West Florida. The top navigation bar includes: HOME, FACULTY & STAFF, DEPARTMENTS, SCHOOLS, CIP CODES, FILE-Q™, GLOSSARY, LIBRARY, **REPORTS**, and CONTROL PANEL. A red arrow points to the 'REPORTS' menu item. The main content area is divided into three sections: Announcements & News, Key Statistics, and Calendar. The Key Statistics section shows data for People (Faculty: 2, Staff: 1, Teaching in current semester: 842) and Degrees (Doctorate: 40, Masters: 30, Bachelors: 20). The Calendar shows the month of October 2019.

Under **Agency Reports** you will see **SACSCOC**. Select **View** on the right side.

The screenshot shows the Xitracs interface for the University of West Florida, displaying the 'Reports' section. The top navigation bar includes: HOME, FACULTY & STAFF, DEPARTMENTS, SCHOOLS, CIP CODES, FILE-Q™, GLOSSARY, LIBRARY, **REPORTS**, and CONTROL PANEL. The 'Reports' section is divided into three categories: General Reports, Agency Reports, and Management Reports. The 'SACSCOC' report under 'Agency Reports' is highlighted, and a red arrow points to the 'View' link in the 'Function' column.

General Reports	Description	Function
Credentials online	Open credentials online website in new window URL: https://uwf.xitracs.net/survey/query/reviewerfacultyview.jsp	<a href="#">View</a>
Credentials PDF report	Generate a credentials report in PDF format	<a href="#">View</a>
Credentials MS Excel® report	Generate a credentials report in MS Excel® spreadsheet format	<a href="#">View</a>
Agency Reports	Description	Function
SACSCOC	Generate a SACSCOC faculty roster report in PDF or MS Word® format	<a href="#">View</a>
Management Reports	Description	Function
Certificate expiry report	List certificates that require renewal	<a href="#">View</a>
Courses with sections	List courses with a section	<a href="#">View</a>
Courses with no sections	List courses without a section	<a href="#">View</a>
Course sections with no instructors	List course sections without an instructor	<a href="#">View</a>

Unless you make a selection, the default is **All departments**. The All departments default will give you all faculty across all colleges (schools). You likely don't want to use this option.

You have the flexibility to Print by College (School) or by Department.

To **Print by College**, click **All Departments in the School** and **select the name of your college** from the drop down.

To **Print by Department**, click **Department**, and **select your department** from the drop down.

Then select the **Semester**. (You have the flexibility to select multiple terms.)

Next, be sure to check the box in the **Qualification's** section for **Include descriptions**.

Finally click **Submit** to generate your report.

The screenshot shows the 'SACSCOC Agency Faculty Roster Report' form in the XitracS™ Faculty Credentials Module. The form is titled 'SACSCOC Agency Faculty Roster Report' and includes the following sections:

- Location:** A dropdown menu.
- Status:** A dropdown menu.
- Type:** A dropdown menu.
- Department Selection:** Three radio button options:
  - All departments
  - All departments in the school: Academic Engagement
  - Department: Academic Classroom
- Semester:** A dropdown menu with options: Fall 2020, Spring 2020, Fall 2019, Spring 2019, Fall 2018, Spring 2018, Fall 2017, Spring 2017. A note says: 'Select the semester(s) to be included in the report. Use the CMD key to select multiple semesters.'
- Format:** Three radio button options:
  - PDF (Requires Adobe Acrobat X or higher)
  - Word (Requires MSWord® 2007 or later)
  - Page break by name
  - Include names in TOC
- Course Detail:** Two radio button options:
  - Course only
  - Section only
- Grouping:** Three radio button options:
  - Department
  - Discipline
  - Faculty
- Links:**  Include hyperlinks
- Qualifications:**
  - Do not repeat qualifications
  - Include credits
  - Include descriptions

At the bottom of the form are three buttons: **Submit**, **Clear**, and **Cancel**.

## Appendix A: List of Abbreviations to Use in Xitracs™

### Terminal Degrees

Doctor of Philosophy	Ph.D.
Doctor of Education	Ed.D.
Medical Doctor	M.D.
Doctor of Psychology	Psy.D.
Doctor of Physical Therapy	D.Pt.
Doctor of Business Administration	D.B.A.
Doctor of Musical Arts	D.M.A.
Doctor of Ministry	D.Min.
Doctor of Nursing Practice	D.N.P.
Doctor of Public Health	D.P.H.

### Masters Degrees considered terminal (partial list)

Master of Fine Arts	M.F.A.
Juris Doctorate	J.D.
Master of Social Work	M.S.W.
Master of Architecture	M.Arch.

### Masters Degrees (these degrees are not terminal)

Ed Specialist	Ed.S.
Master of Education	M.Ed.
Master of Arts	M.A.
Master of Science	M.S.
Master of Public Administration	M.P.A.
Master of Business Administration	M.B.A.
Master of Accountancy	M.Acc.
Master of Laws	L.L.M.

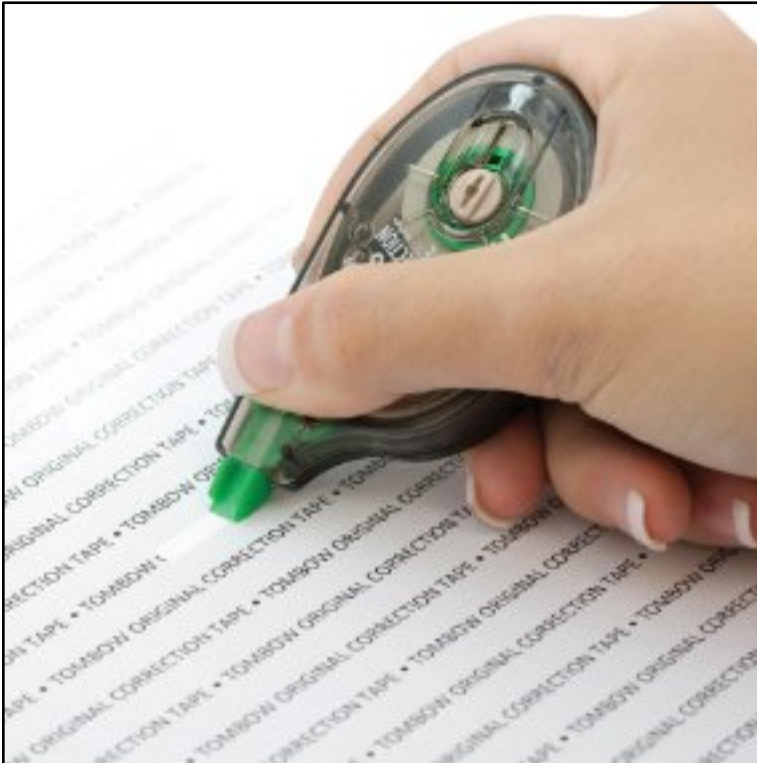
### Bachelor's Degrees

Bachelor of Science	B.S.
Bachelor of Arts	B.A. (some schools award A.B.)
Bachelor of Fine Arts	B.F.A.
Bachelor of Music	B.M.
Bachelor of Music Education	B.M.Ed.
Bachelor of Science in Business Administration	B.S.B.A.

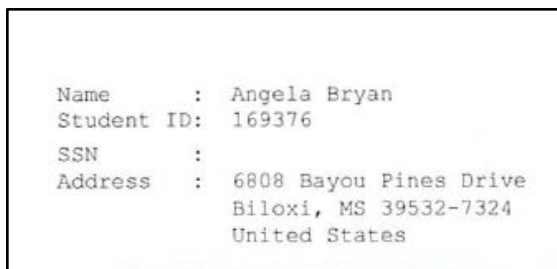


## Appendix B: Notes on Redaction

1. Print the transcript.
2. Using a white-out tape dispenser, cover the Social Security Number. Be sure to check all pages.



3. Scan the document with Personal Information redacted. The redacted information should be completely covered, and not at all visible.



4. Once the document is scanned, the file should be saved with the proper naming convention for that document. See **Appendix C** for more details.
5. Transcript file is ready to upload to faculty profile.

## Appendix C: Naming Convention for Files

### CV and Resume filename

Format: (last name\_firstname)\_CV or Resume\_(Date)

For CV's and Resumes, please use either YYYY, MMYYYY or MMDDYYYY when entering the date.

Examples:

Bryan\_Angela\_CV\_2018.pdf

Bryan\_Angela\_Resume\_07152019

### Transcript filename

Format: (last name\_firstname)\_Tran\_(B, M, or D)

B – Bachelor, M – Master, S – Specialist, or D – Doctorate

Your selection should indicate the highest degree awarded on the Transcript.

Examples:

Bryan\_Angela\_Tran\_D

Bryan\_Angela\_Tran\_M

Bryan\_Angela\_Tran\_B

### Evaluation filename

Format: (last name\_firstname)\_EVAL\_(Date)

For Evaluations, please use either YYYY, MMYYYY or MMDDYYYY when entering the date. Here it is also acceptable to use TermYYYY.

Examples:

Bryan\_Angela\_Eval\_20190305

Bryan\_Angela\_Eval\_Spring2019

### Job Description filename

Format: (last name\_firstname)\_(Job\_Title)

Examples:

Bryan\_Angela\_Director\_of\_Institutional\_Effectiveness