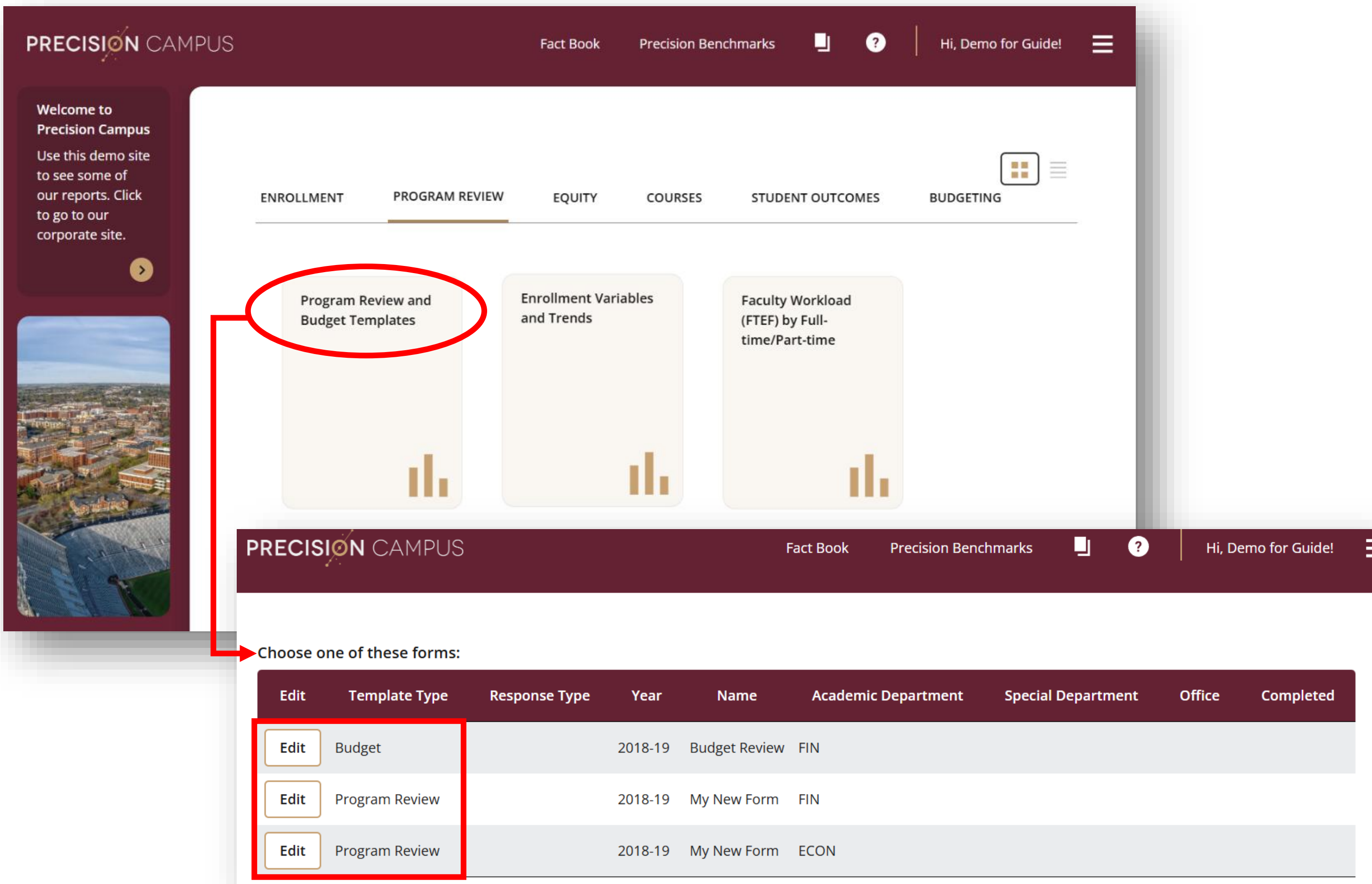
Precision Campus Program Review Guide

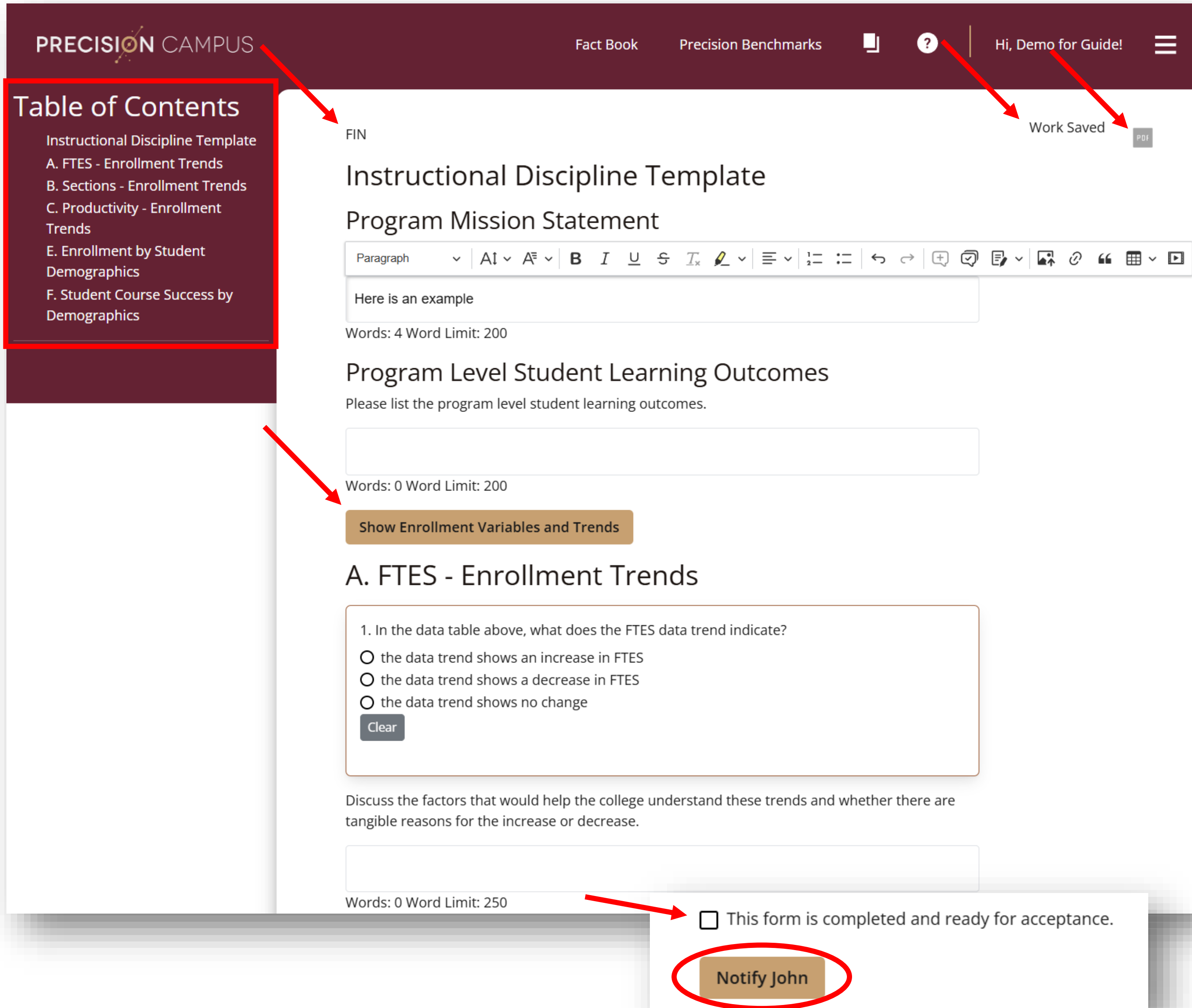
The program review tool automates the program review process so that users automatically view their unit's data and provide responses to program review questions in one location.

Completing a Program Review Form

Users who have been assigned to a program review template will see a Templates card in Precision Campus.

- If a user is assigned to only one template, clicking the Template card will open that template.
- If a user is assigned to more than one template, clicking the Template card will open a list for them to select which form they would like to access by selecting **Edit**. Details about the form are available in this table, including the academic department the user is assigned to.



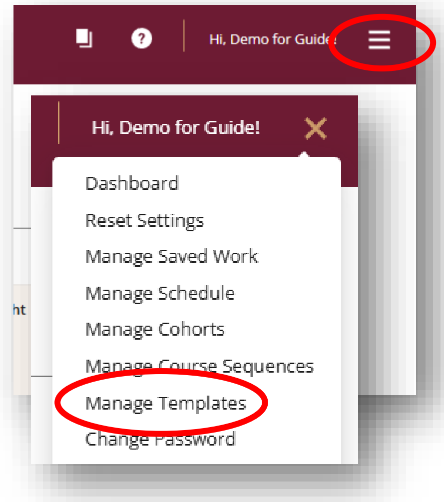


- The department that the user is reviewing and viewing data for is displayed at the top of the form.
- A Work Saved message appears to confirm responses are saved as they are entered.
- Use the Table of Contents to navigate to other sections of the form.
- Click the **Show** button to display the reports embedded in the form.
- Select the **PDF** icon at the top right to create a PDF copy of the form.
- When the form is complete, select the check box **This form is completed and read for acceptance** then click the **Notify** button to notify the program review administrator that the form is complete.

Managing Program Review

Template management allows users overseeing the program review process to create and configure new templates, edit/add users to templates, and view/export responses submitted in templates.

Administrators enable “Manage Templates” permission to allow users to manage templates and configure the program review tool.



1. Navigate to **Manage Templates** in top hamburger menu (contingent on “Manage Templates” permission).

2. Existing templates are displayed in the Template Management list. To create a new template, enter a name and select **Create**.

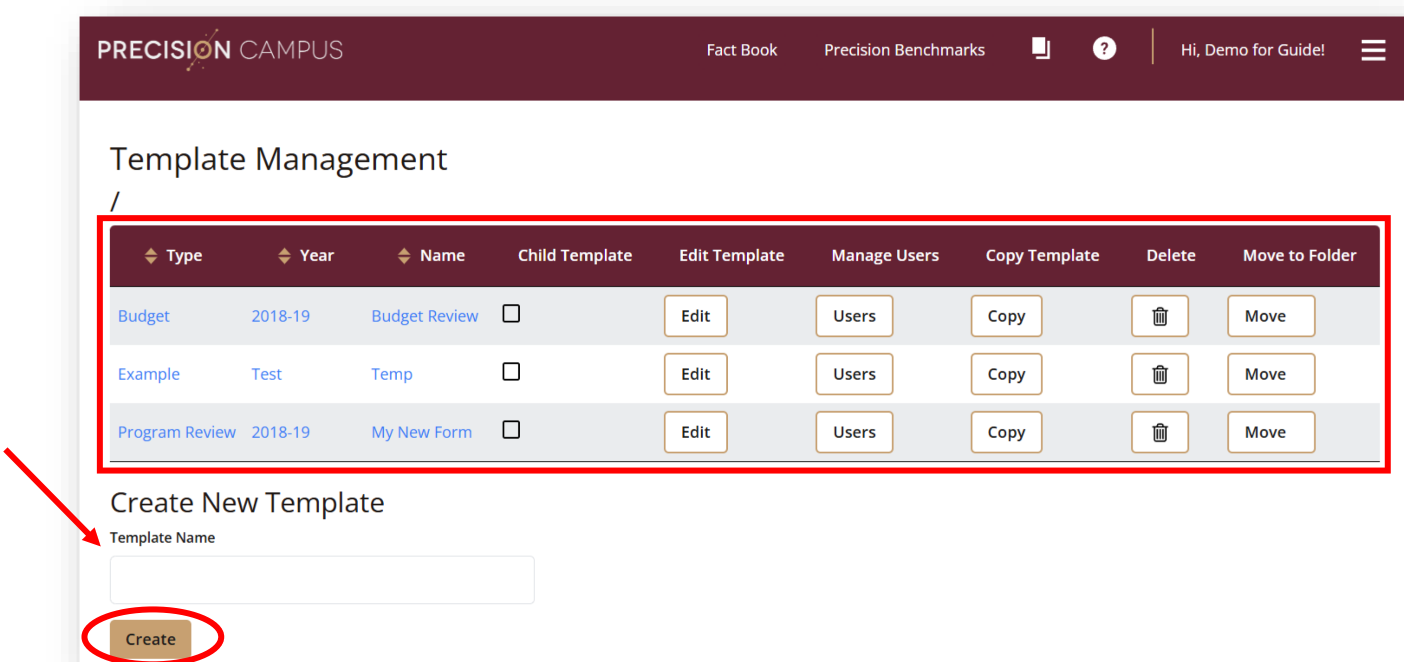
3. Click the blue text to edit template details Type, Year, and Name.

4. To use a template within another template, check the box to designate it as a **Child Template**.

5. To configure a template’s content, select **Edit**.

6. To edit/add users and assign them to departments, select **Users**.

7. Templates can be copied using the **Copy** button, deleted using the **trashcan** button, and organized in folders using the **Move** button.



Editing Templates

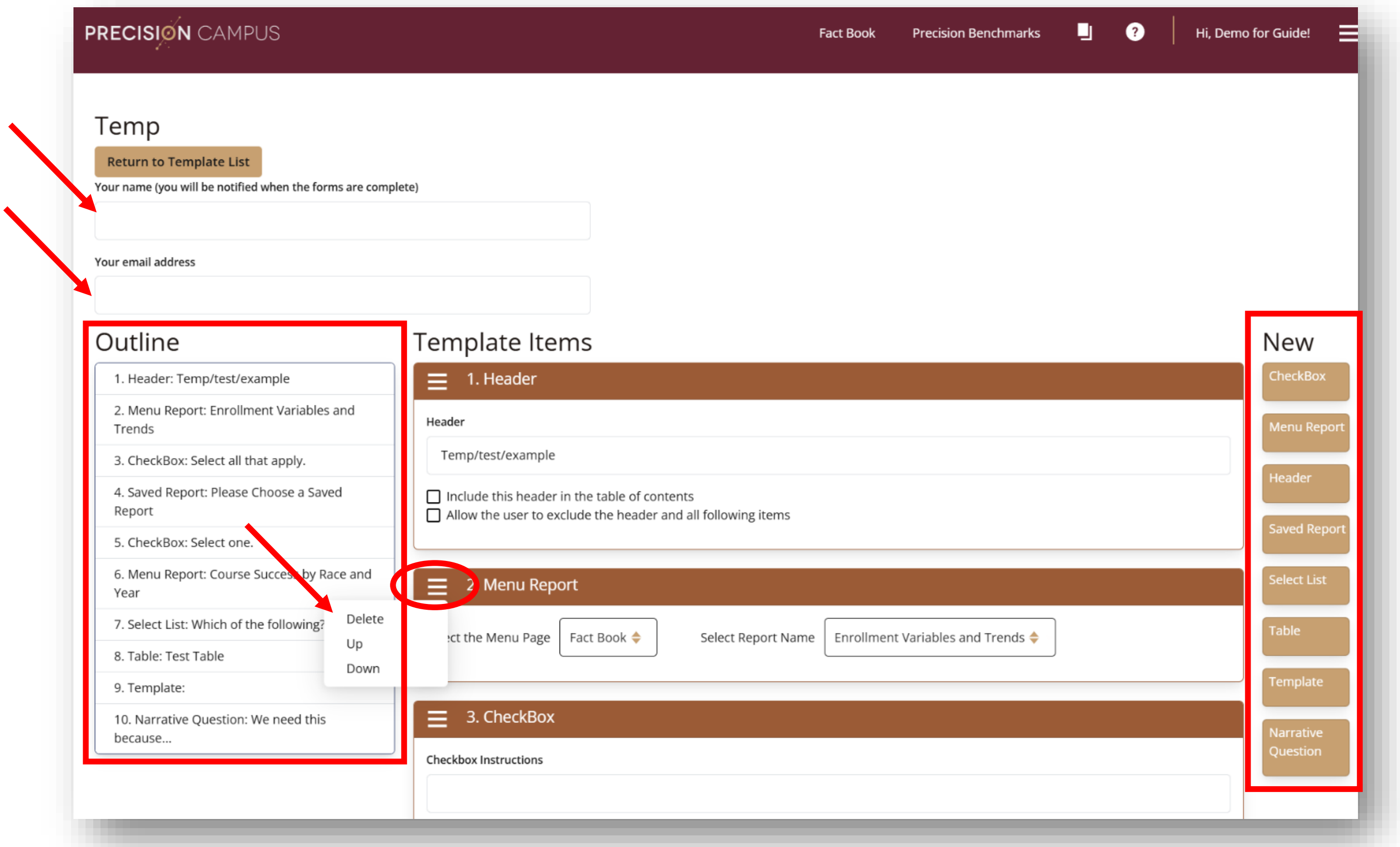
1. From the Template Management list, select **Edit**.

2. Add the name and email address of the user who should be notified when a form is completed.

3. Drag and drop new items from the right side onto the form body to add them.

4. To reorder items, either click and drag items in the **Outline** or move each item up or down the hamburger menu for each item.

5. Click **Return to Template List** to leave editing area. Changes are automatically saved.



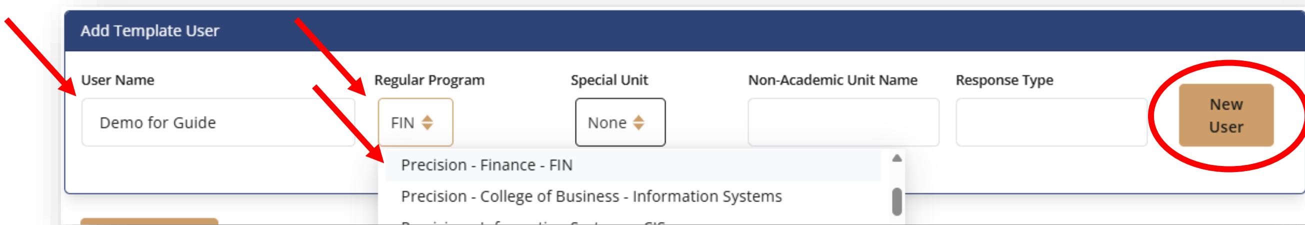
Types of Template Items:

- **Checkbox** – item with multiple response options (single or multi-select)
- **Menu Report** – a report from a menu
- **Header** – header text
- **Saved Report** – a saved report
- **Select List** – items with dropdown list with multiple response options
- **Table** – a table customized for collecting responses
- **Template** – a “child template”
- **Narrative Question** – descriptive text or text entry box

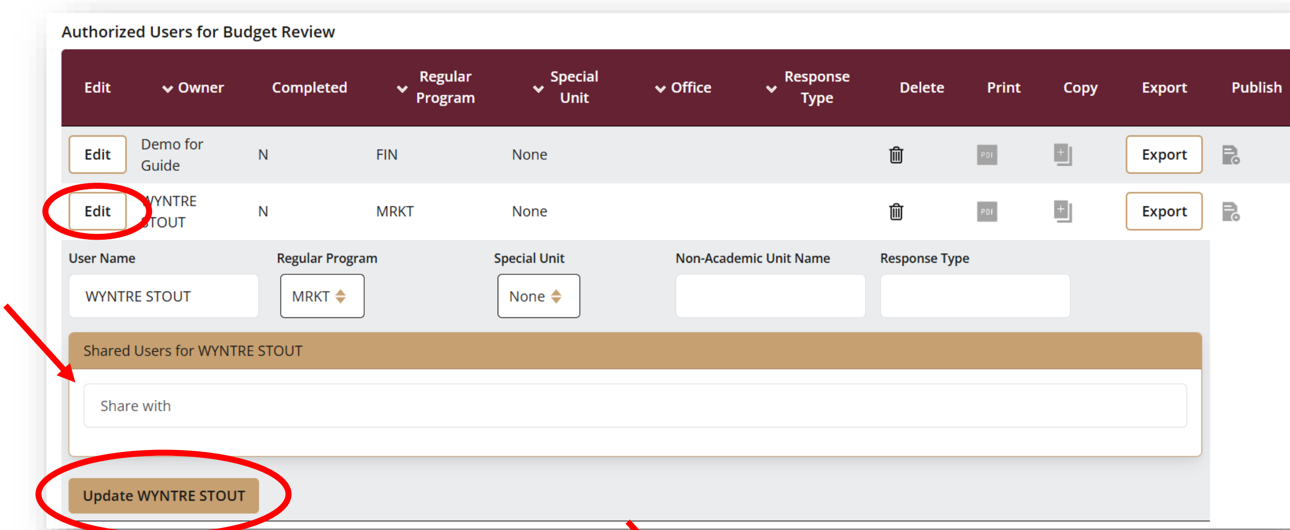
__Managing Users__

1. From the Template Management list, select **Users**.

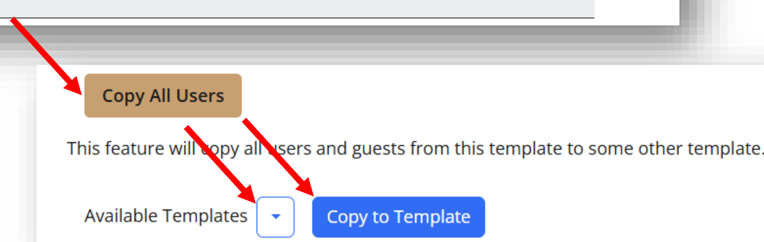
2. To create a new user, complete the **Add Template User** box:
    a. Select the intended user from the list that appears as you begin typing their Precision Campus username.
    b. Make a selection from the Regular Department dropdown to assign them to an academic department.
    c. Contact Precision Campus staff for additional information on other unit designations.
    d. Click the **New User** button to add user.



3. To edit existing users, select **Edit** beside their name.
    a. Update their information as needed.
    b. To add collaborators on the template that they are responsible for, add usernames under **Shared Users**.
    c. Click the **Update** button to save changes.



4. To copy all users and assign them to another template, click the **Copy All Users** button, select the new template, and click **Copy To Template**.



Managing & Exporting Responses

- Select the **trashcan** icon to delete individual responses.
- Select the **PDF** icon to print individual responses to PDF.
- Select the **Copy** icon to duplicate responses.
- Select **Export** to add individual responses to an export.
    - Select **Print Condensed Responses** to export a condensed view of responses to a PDF.
    - Select **Dump Selected Responses to Text File** to export a condensed view of responses to a HTML file.
- Select the **Publish** icon to publish responses to a website.
- Select Export **All Responses to Excel via Email** to export all responses as a batch.
- To export specific items as a batch, enter the desired items in the “**Limit exported or printed results to selected template items**” window.