

# PRPP Quick Start Guide

Lisa Davis  
SANTA ROSA JUNIOR COLLEGE



# PRPP Quick Start Guide

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[FAQs](#)



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## The PRPP Template

The PRPP Template is a budget and planning tool developed to facilitate the PRPP report writing process. The template contains three tool bars and several predefined sections, which reflect the different sections of your PRPP report.

### Login to the PRPP Template – Shortcut Procedure

1. If you would like to bypass the SharePoint site and log directly into the PRPP Template application, follow the steps below:

- 1.1. Go to the Santa Rosa Junior College Home page: <http://www.santarosa.edu>.
- 1.2. Click on **Administration > Information Technology** in the Main menu at the top of your screen. The **Information Technology** Home page should appear. (See **Figure 1** below.)



**Figure 1: SRJC Information Technology Home Page**

- 1.3. Click on **Citrix** under **Technology Portals** in the left Navigation panel on the **Information Technology Home** page. (See **Figure 1** above.)
- 1.4 Then, follow **Steps 2.5 - 2.10** below (skip **Steps 2.1 – 2.4**).



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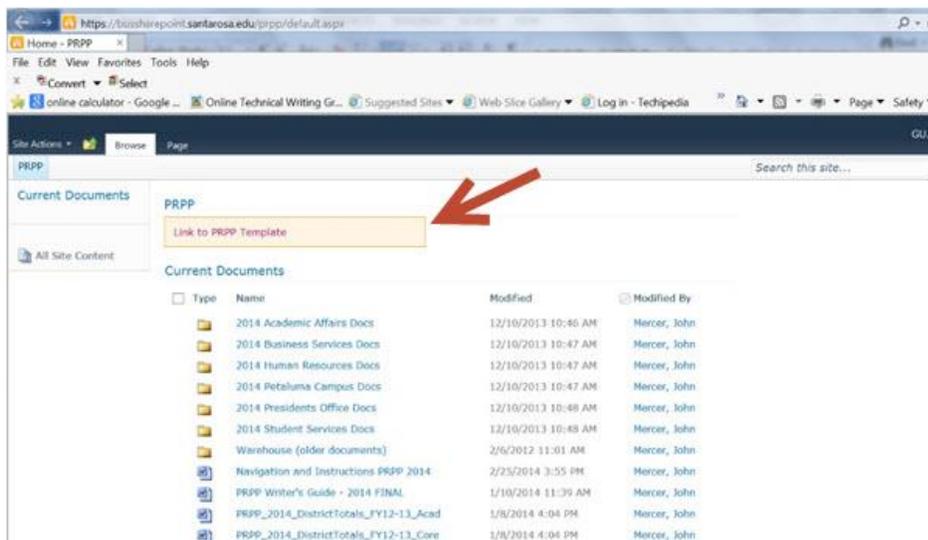
Login to the PRPP application – Standard Procedure

2. If you need to access your SharePoint documents before logging into the PRPP Template application, use the **Standard Login** procedure below.
  - 2.1. Go to the **PRPP Home** page: <http://www.santarosa.edu/PRPP> .
  - 2.2. The **Windows Security** dialog box should appear. Sign in using your network User Name and Password. (See **Figure 2** below.)



**Figure 2: Windows Security Dialog Box**

- 2.3 The **PRPP Home** page should appear. This page allows you to access your SharePoint documents and your PRPP Template via the **Link to Template** button located in the top left corner of the page. (See **Figure 3** below.)



**Figure 3: The Home – PRPP Page**



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- 2.4 After accessing your SharePoint document(s), click on the **Link to PRPP Template** button.
- 2.5 The **Internet Explorer Security Warning** dialog box should appear. Click on the **Allow** button to open the Citrix website. (See **Figure 4** below.)



**Figure 4: Internet Explorer Security Dialog Box**

- 2.6 The **Citrix XenApp** login dialog box should appear. Sign in using your network User name and Password. (See **Figure 5** below.)

NOTE

If you have trouble connecting to Citrix, please contact the Help Desk for assistance.



**Figure 5: Citrix XenApp Login Dialog Box**

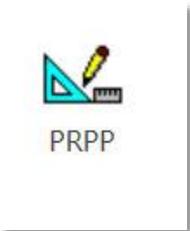


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- 2.7 The Citrix **Main** menu should appear. Click on the **PRPP** icon in the menu. (See **Figures 6 and 7** below.)



**Figure 6: Citrix Main Menu**



**Figure 7: PRPP Icon**

- 2.8 The **Citrix Receiver - Security Warning** dialog box should appear. Click on the **Permit use** button to allow the Citrix website to access information. (See **Figure 8** below.)



**Figure 8: Citrix Receiver – Security Warning**

- 2.9 The **Authenticate PRPP User Logon** dialog box should appear. Log onto the PRPP application using your network User Name and Password. (See **Figure 9** below.)



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Figure 9: Authenticate PRPP User Logon Dialog Box

2.10 The **Select PRPP Template** dialog box should appear. (See **Figure 10** below.) This dialog box allows you to select your template using two options. Click on the following link for instructions on how to [select your PRPP Template](#).

**NOTE**

In order to open a PRPP template which has an "In-Progress" status, you must be either an Administrator, Editor, or an Approver of that template.

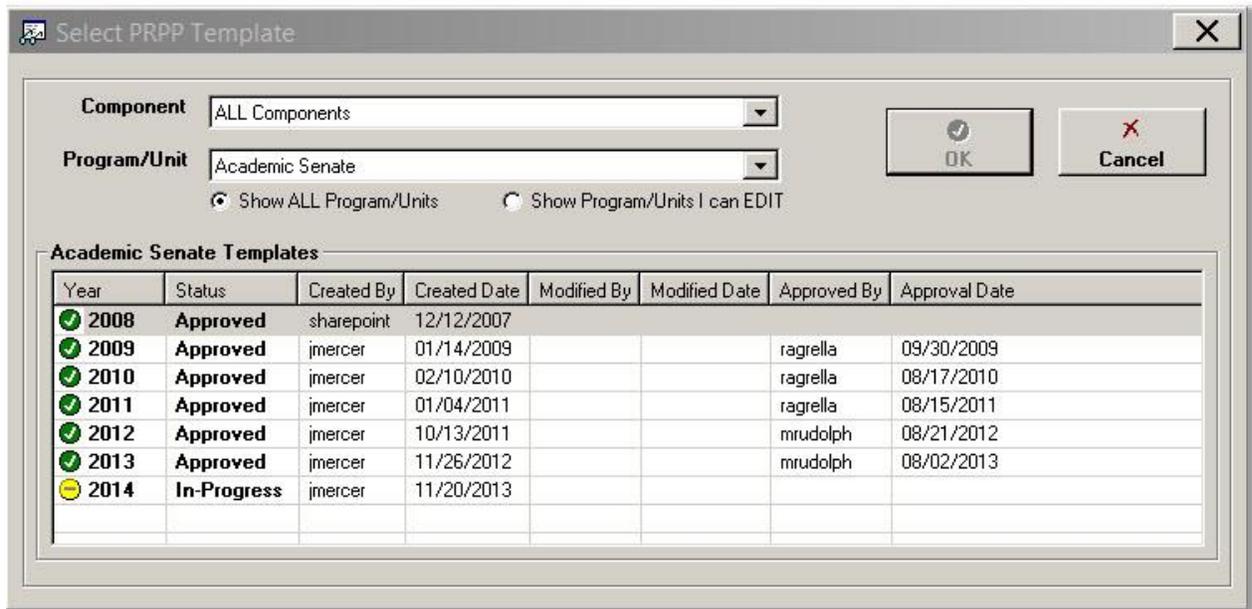


Figure 10: Select PRPP Template Dialog Box



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Select your PRPP Template

3. Follow either procedure below to search for and select your PRPP Template:
  - 3.1 You can narrow down the list of templates before making your selection by following the steps below:
    - 3.1.1. Click on the **Component** scrollbar arrow. Then, select your component from the displayed list. (See **Figure 11** below.)
    - 3.1.2. Select a radio button (either **Show ALL Programs/Units** or **Show Programs/Units I can EDIT**).
    - 3.1.3. Click on the **Program/Unit** scrollbar arrow. Then, select your program from the displayed list.
  - 3.2 Or you can select directly from the complete list of templates.
    - 3.2.1 Search for and then select your PRPP template from the list displayed at the bottom of the **Select PRPP** dialog box. (See **Figure 11** below.)

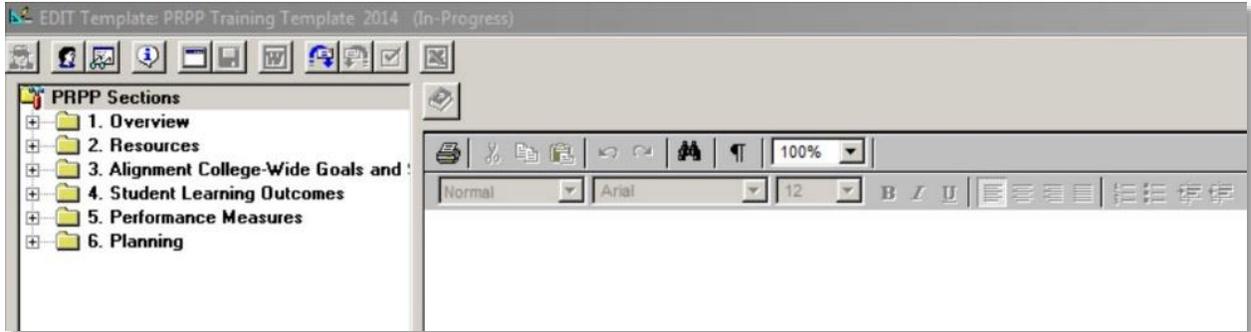
Year	Status	Created By	Created Date	Modified By	Modified Date	Approved By	Approval Date
2008	Approved	sharepoint	12/12/2007				
2009	Approved	jmercerc	01/14/2009			ragrella	09/30/2009
2010	Approved	jmercerc	02/10/2010			ragrella	08/17/2010
2011	Approved	jmercerc	01/04/2011			ragrella	08/15/2011
2012	Approved	jmercerc	10/13/2011			mrudolph	08/21/2012
2013	Approved	jmercerc	11/26/2012			mrudolph	08/02/2013
2014	In-Progress	jmercerc	11/20/2013				

Figure 11: Select PRPP Template Dialog Box



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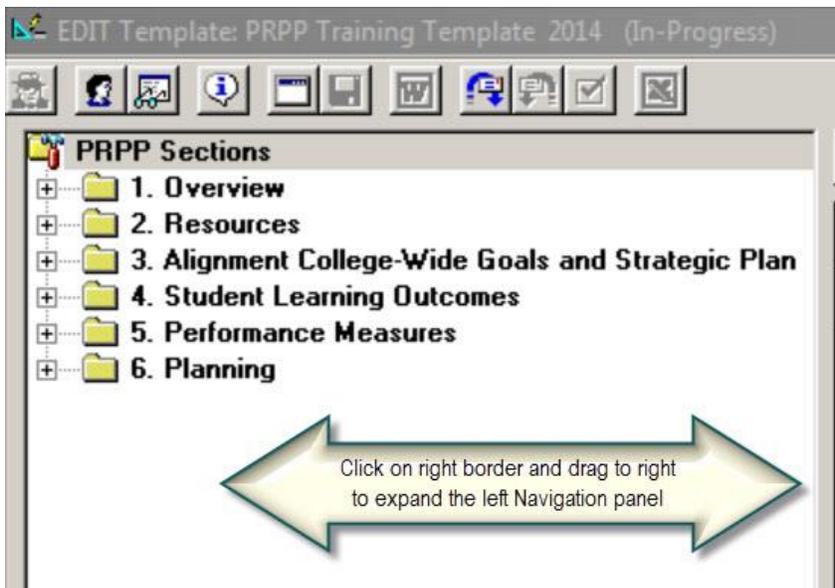
- 3.3 After selecting your PRPP template, click on the **OK** button. Your PRPP Template should appear. (See **Figure 12** below.)



**Figure 12: The PRPP Template**

### Accessing your PRPP Template

4. Follow the steps below to access your PRPP Template:
  - 4.1 Click on the right border of the left pane and drag to the right until you can view the complete names of all the PRPP sections. (See **Figure 13** below.)



**Figure 13: Left Navigation Pane**

- 4.2 To expand a folder and access all of the PRPP sections contained within it, click on the expand indicator to the left of the folder icon.



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- 4.3 Click on the name of the section that you want to open. The selected section should appear in the right pane of the PRPP Template.
- 4.4 Click in the **Text Editor** or **Edit Window** section in the right pane to begin developing/editing your report.
- 4.5 Follow the Writer's Guide to complete all sections of the PRPP Template for your program. (The current Writer's Guide can be accessed via the SharePoint PRPP site: <http://www.santarosa.edu/PRPP>).



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### The PRPP Main Tool Bar

The **PRPP Main Tool Bar** contains several buttons, which are used to access a variety of features for creating your PRPP report. (See **Figure 14** below.)



**Figure 14: PRPP Main Tool Bar**

#### NOTE

Your user access level and Home directory status will determine which buttons are active on your **PRPP Main Tool Bar**.

For instructions on how to determine which buttons should be active on your **PRPP Main Menu Tool Bar**, click on the following link: [Check your Access Level.](#)

### PRPP Main Tool Bar Buttons

#### *PRPP Administrator Tasks Button*



The PRPP Administrator uses the features accessed by this button to perform administrative tasks. This button will be deactivated (grayed out) for all other users.

#### *Logon as Another User Button*



Displays the **Authenticate PRPP User Logon** dialog box, which allows another user to log on. To reopen the PRPP Template application, the new user must first log on. (See **Figure 15** below.)

#### NOTE

Clicking on the **Logon as another user** button closes your current PRPP template without saving your changes. Before clicking on this button, click on the **Save Changes** button in the **PRPP Main Tool Bar** to save any changes that you have made to the **Text Editor** section.



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Figure 15: Authenticate PRPP User Logon

### Select PRPP Template Button



Displays the **Select PRPP Template** dialog box, which allows you to select another template without having to log out and back into the PRPP application. Click on the following link for instructions on how to [select your PRPP Template](#). (See **Figure 16** below.)

#### NOTE

In order to open a PRPP template which has an "In-Progress" status, you must be either an Administrator, Editor, or an Approver of that template.

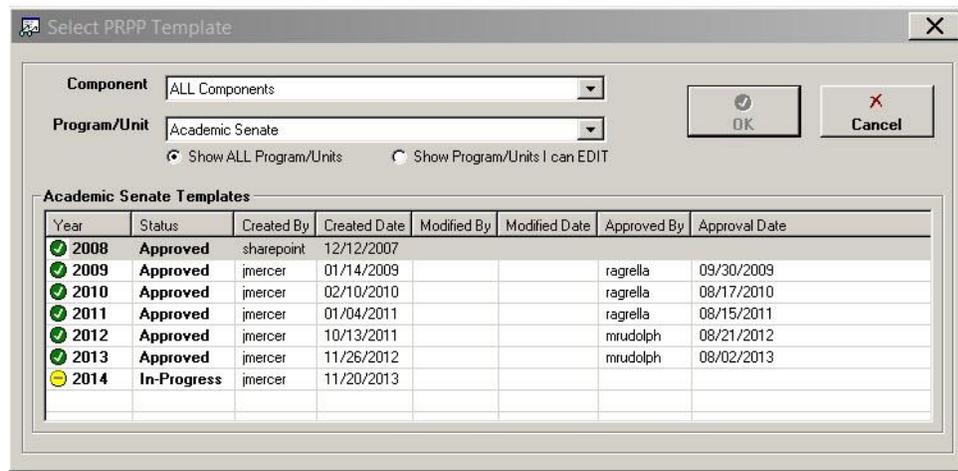


Figure 16: Select PRPP Template Dialog Box



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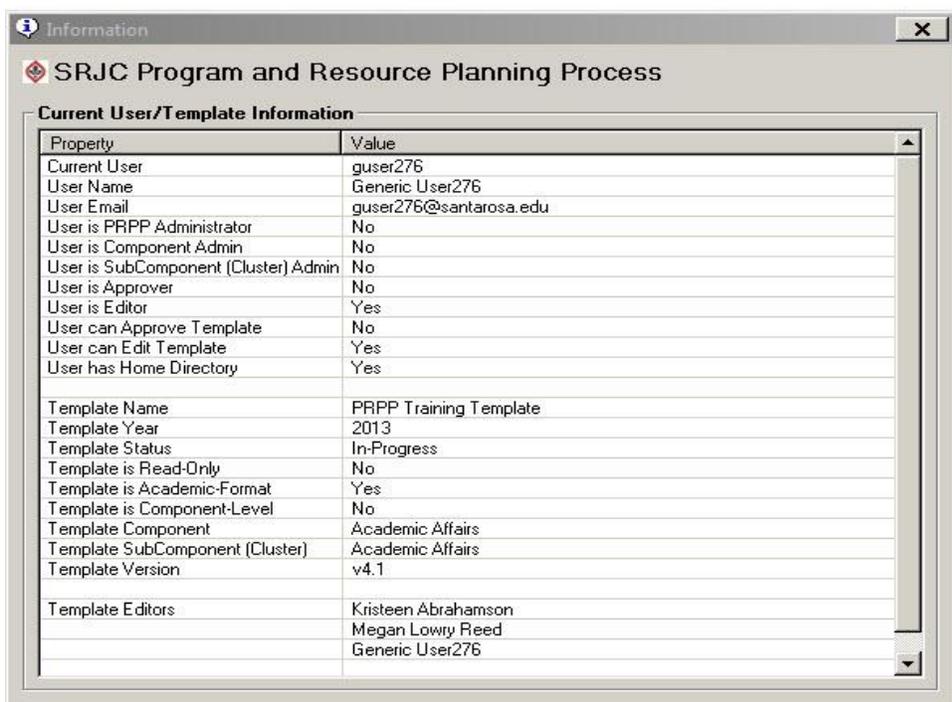
### NOTE

Selecting another template closes your current PRPP template without saving your changes. Before clicking on this button, click on the **Save Changes** button in the **PRPP Main Tool Bar** to save any changes that you have made to the current **Text Editor** section.

### Information Button



Displays the **Information** window, which contains a list of **Current User/Template Information**, such as your User Name, User Access Level, Home Directory status, Template Name, etc.... (See **Figure 17** below.)



**Figure 17: Information Window**

### Check your User Access Level

5. To check your user access level, follow the procedure below:

5.1



Click on the **Information** button on the **PRPP Main Tool Bar**. The **Information Window** should appear. (See **Figure 18** below.)

5.2

Confirm your user access level by checking the **Value** and **Property** columns in the **Information Window**. (See **Figure 18** below.)



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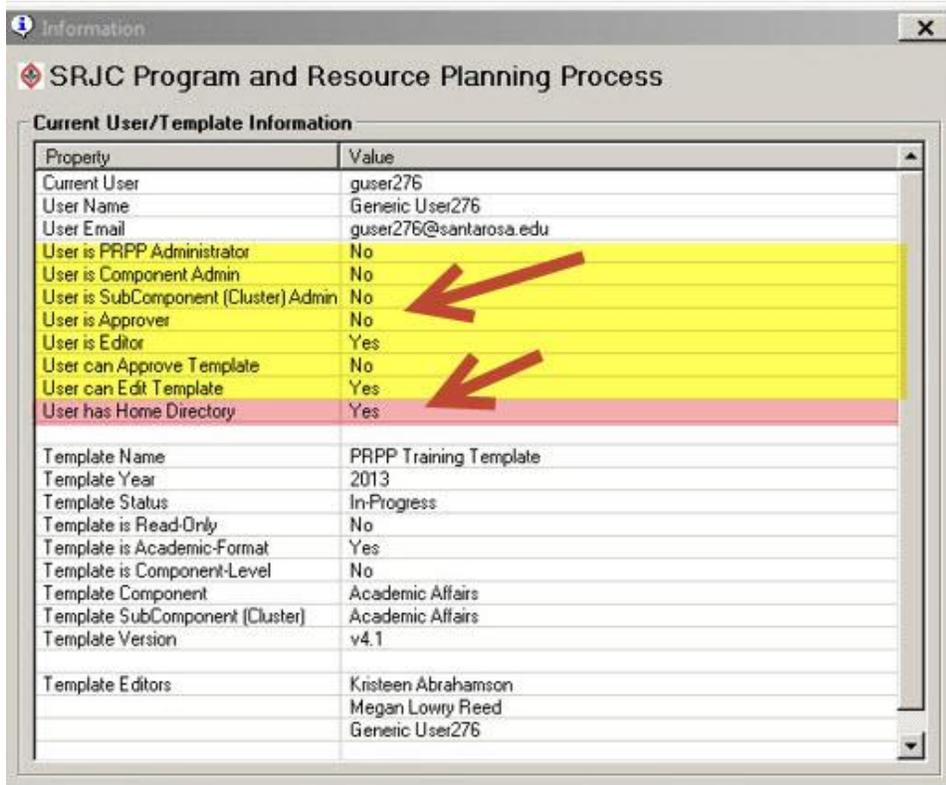


Figure 18: User Access Levels and Home Directory Setup

- 5.3 Confirm your **Home Directory** status by checking the value for the **User has Home Directory** property in the **Information Window**. (See **Figure 18** above.)

**NOTE**

Your **User Has Home Directory** property must have a value of “Yes” in order for the **Create Word Documents** and the **Create Spreadsheets** buttons to be activated.

- 5.4 If your **User has Home Directory** property is “No”, and the **Create Word Documents** and the **Create Spreadsheets** buttons are deactivated, please contact your supervising administrator for advice.
- 5.5 If the value of your User has Home Directory property is “Yes”, then the **Create Word Documents**  and the **Create Spreadsheets**  buttons on your **PRPP Main Tool Bar** should be active.
- 5.6 Go to **Table 1** below. Locate the **PRPP Main Tool Bar** screen shot in the **Active Buttons** column that corresponds to your user access level/Home directory status.



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5.7 Compare the screen shot corresponding to your user access level/Home directory status in **Table 1** with the active buttons on your **PRPP Main Tool Bar**.

**NOTE** The **Save Changes** button remains deactivated (grayed out) until you have clicked inside the **Text Editor** section of the PRPP Template to make changes.

Active PRPP Main Tool Bar Buttons			
Property	Value	Home Directory	Active Buttons
User is PRPP Administrator	Yes	Yes	All buttons
User is PRPP Administrator	Yes	No	All buttons except for the Create Word Documents and Create Spreadsheets buttons
User is Approver	Yes	Yes	
User is Approver	Yes	No	
User is Editor	Yes	Yes	
User is Editor	Yes	No	

**Table 1: User Access Levels for PRPP Main Tool Bar Buttons**

5.8 If you find any buttons on your **PRPP Main Tool Bar** that should be active and are not, please contact your supervising administrator for advice.

[Return to PRPP Main Tool Bar](#)

### Clear Textbox Button



Displays the **Clear Section** dialog box, which allows you to clear ALL text from the current section of your PRPP report. (See **Figure 19** below.) Clicking on the **No** button cancels the **Clear Text** function and closes the dialog box.

**NOTE** Clicking on the **Yes** button in the **Clear Section** dialog box clears ALL text from the current section, returning it to its default state. Only click on the **Clear Textbox** button when other methods of deleting text will not work.



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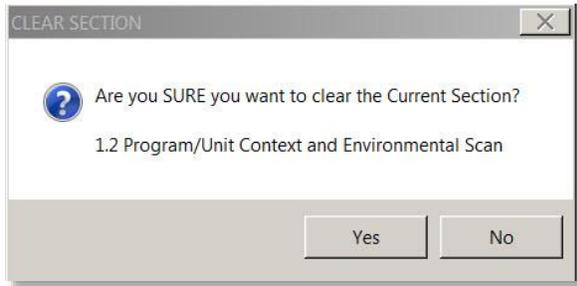


Figure 19: Clear Section Dialog Box

### Save Changes Button



Saves changes that you have made to the current **Text Editor** section you are working on in the PRPP Template application. (See **Figure 20** below.) This button remains deactivated until you click in the **Text Editor** section.

#### NOTE

Each time you click on the **Save Changes** button, your original text will be overwritten.

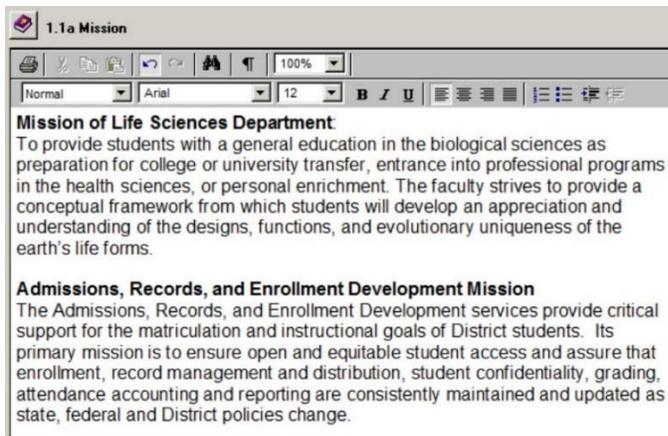


Figure 20: Current Section Displayed in the Text Editor

6. After working in the **Text Editor** section, click on the **Save Changes** button in the **PRPP Main Tool Bar** to save your changes.

#### NOTE

If you navigate away from the **Text Editor** section and try to open another section without saving your changes, a dialog box will appear prompting you to "Save any changes to current section?" You can select **Yes** or **No**.



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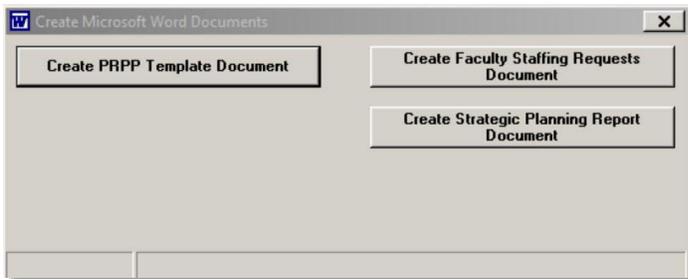
### Create Word Documents Button



Displays the **Create Microsoft Word Documents** dialog box where you can select from three options for creating your PRPP report. (See **Figure 21** below.)

#### NOTE

If your **Create Word Documents** button is not active (grayed out), please contact your supervising administrator for advice. This typically means that you do not have a Home directory set up on your computer system.



**Figure 21: Create Microsoft Word Documents Dialog Box**

### Create MS Word Documents

7. To create an MS Word Document, follow the procedure below:

7.1 Click on the button for the type of PRPP document that you would like to create. (See **Figure 22** below.)

**Create PRPP Template Document**

Creates a document from all of the sections in your PRPP report and saves it to your Home directory.

**Create Faculty Staffing Requests Document**

Creates a Faculty Staffing Requests document from all sections pertaining to staffing requests. Then, it saves it to your Home directory.

**Create Strategic Planning Report Document**

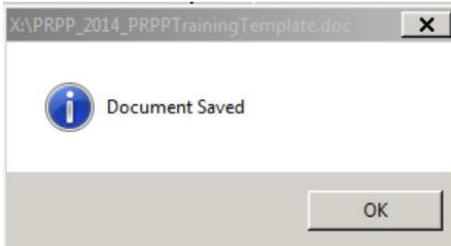
Creates a Strategic Planning report from all sections pertaining to strategic planning. Then, it saves it to your Home directory.

**Figure 22: Create Microsoft Word Document Buttons**



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- 7.2 The **Document Saved** dialog box should appear with the file name and directory location of your document displayed across the top of the dialog box. (See **Figure 23** below.)



**Figure 23: Document Saved Dialog Box**

### [Print Out your PRPP Report](#)

8. To print out your PRPP report, follow the procedure below:
- 8.1 Go to your Home directory where you saved your PRPP report and open the document.
  - 8.2 Confirm that your printer and MS Word print options are set correctly for printing out your report.
  - 8.3 Then, click on the **Print** button in the MS Word application to print out your report.

### [Request Approval of PRPP Template Button](#)



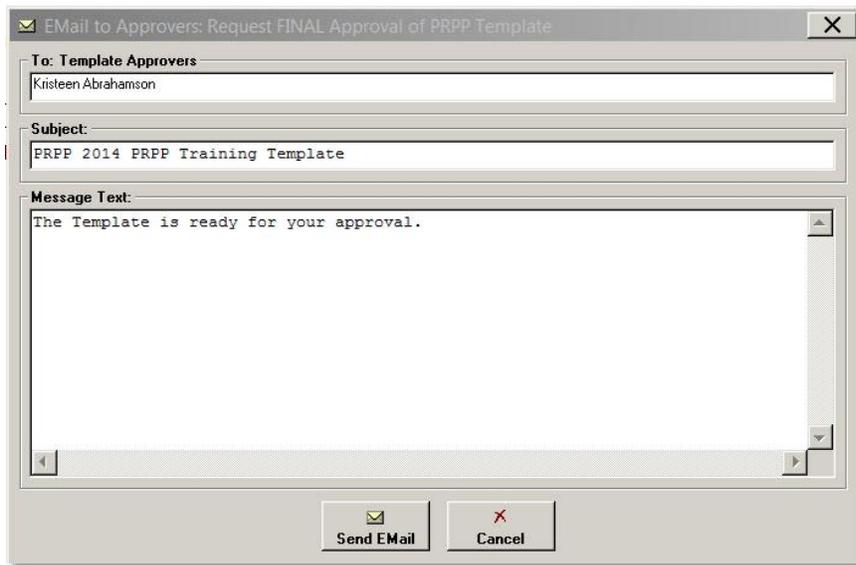
Displays the **Email to Approvers: Request FINAL Approval of PRPP Template** dialog box, which allows you to send a message to request FINAL approval of your PRPP report. (See **Figure 24** below.)

#### **NOTE**

Developing the PRPP report should be a collaborative process. Before clicking on the **Request Approval of PRPP Template** button, all editors in the group should reach a consensus that the report is complete and ready for FINAL approval.



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**Figure 24: Email to Approvers: Request FINAL Approval Dialog Box**

### Procedure for Requesting Approval of PRPP Template

9. To request final approval of your PRPP report, we recommend that you follow the procedure below:
  - 9.1 Assign a lead editor who will be responsible for ensuring that all members of the group have reached the following consensus: their PRPP report is ready for FINAL approval.
  - 9.2 When the PRPP report is ready for FINAL approval, the Lead Editor should click on the **Request Approval of PRPP Template** button. The **Email to Approvers: Request FINAL Approval of PRPP Template** dialog box should appear.
  - 9.3 Use the default text or create your own message for the approvers in the **Message Text** section of the dialog box.
  - 9.4 Then, click on the **Send Email** button to send your message to the approvers of your PRPP report.
  - 9.5 Or click on the **Cancel** button to close the dialog box without sending your email message.

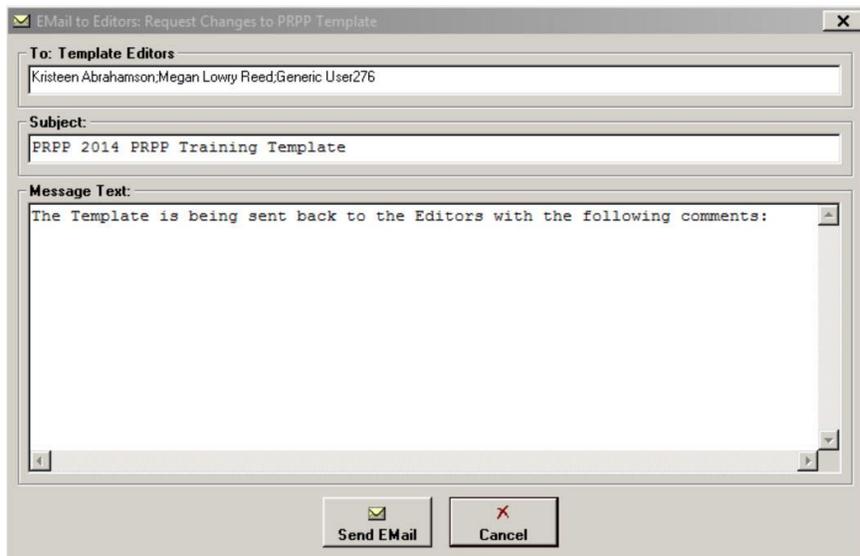


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### *Send PRPP Template Back to Editors Button*



Displays the **E-Mail to Editors: Request Changes to PRPP Template** dialog box, which is used exclusively by the PRPP approvers to send messages back to the editors. The message in the **Message Text** section should indicate the reason the PRPP report was denied and specify the changes required for FINAL approval. (See **Figure 25** below.)



**Figure 25: E-Mail to Editors: Request Changes to PRPP Template Dialog Box**

### *Send PRPP Template Back to Editors*

10. To request changes to a PRPP Template, follow the procedure below:
  - 10.1. Click on the **Send PRPP Template back to Editors** button.
  - 10.2. Create your message in the **Message Text** section of the **E-Mail to Editors: Request Changes to PRPP Template** dialog box.
  - 10.3. Then, click on the **Send EMail** button to send your email message to the editors of the PRPP report.
  - 10.4. Or click on the **Cancel** button to close the **E-Mail to Editors: Request Changes to PRPP Template** dialog box without sending an email message.

### *FINAL Approval of PRPP Template Button*



Displays the **E-Mail to Editors/Approvers FINAL Approval of PRPP Template** dialog box, which allows the approver to send a message informing the editors and approvers that the PRPP report has been approved. (See **Figure 26** below.)



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### NOTE

Once the template is approved, it can no longer be edited. Make sure that the PRPP report is complete and ready for FINAL approval before clicking on the **Final Approval of Template** button.

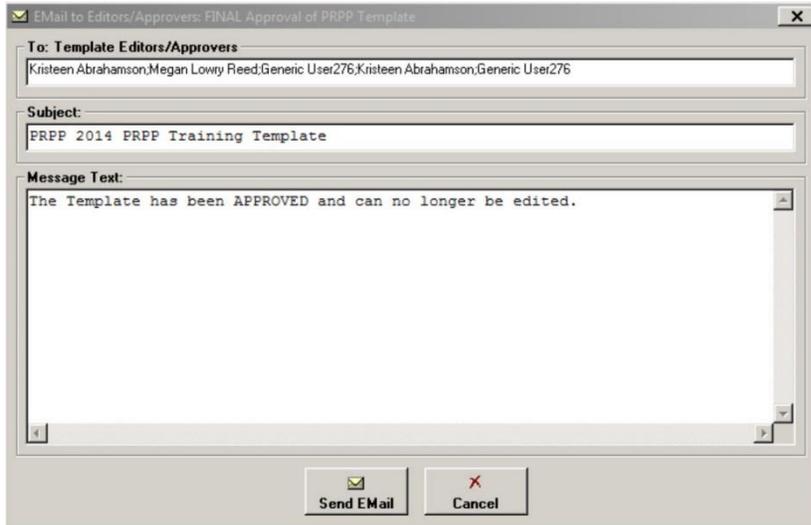


Figure 26: EMail to Editors/Approvers: FINAL Approval of PRPP Template Dialog Box

### Create Spreadsheets Button



Displays the **Export PRPP Spreadsheet Data Tool Bar**, which includes tools for selecting, exporting, and saving PRPP data. (See **Figure 27** below.)

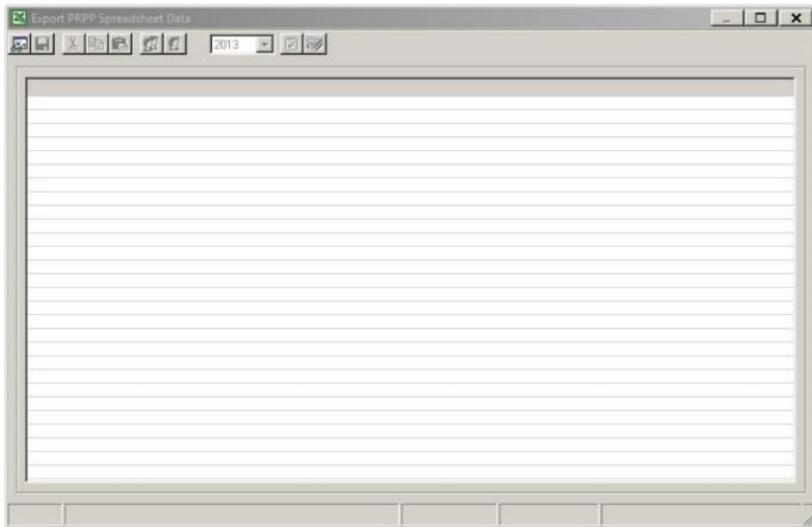


Figure 27: Export PRPP Spreadsheet Data Tool Bar and Window



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## Export PRPP Spreadsheet Data Tool Bar

The **Export PRPP Spreadsheet Data Tool Bar** provides tools that allow you to select and then export data from more than one section of your PRPP report to an MS Excel spreadsheet file located on your Home directory. (See **Figure 28** below.)

**NOTE** Most buttons on the **Export PRPP Spreadsheet Data Tool Bar** are for the Administrator's use only and are deactivated (grayed out) for all other users. To check your access level, click on the **Information** button in the **PRPP Main Tool Bar**.



**Figure 28: The Export PRPP Spreadsheet Data Tool Bar**

Activated Export PRPP Spreadsheet Data Tool Bar Buttons	
Access Level	Active PRPP Main Tool Bar Buttons
PRPP Administrator	All buttons
Approver	Select PRPP Records and Create CSV Export File Buttons
Editor	Select PRPP Records and Create CSV Export File Buttons

### Select PRPP Records Button



Displays the **Select PRPP Records to Export** dialog box, which allows you to search for records based on criteria you select from the dialog box. (See **Figure 29** below.)

**NOTE** Your user access level will determine which categories are active and available to you in the **Select PRPP Records to Export** dialog box. To check your user access level, click on the **Information** button in the **PRPP Main Tool Bar**.



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Figure 29: Select PRPP Records to Export Dialog Box

Select PRPP Records to Export

11. To select the PRPP records to export to an the MS Excel spreadsheet file on your Home directory, follow the procedure below:

11.1. Click on the arrow in the **PRPP Section** scroll box to display a list of sections. (See **Figure 30** below.)

Figure 30: PRPP Section Scroll Box

11.2. Select the section from which you want to export your records to the MS Excel spreadsheet.

11.3. Select from the remaining categories in the **Select PRPP Records to Export** dialog box to specify the criteria of the records that you want to export.

11.4. Click on the **Search** button to search for records that meet the criteria you specified in the **Select PRPP Records to Export** dialog box.





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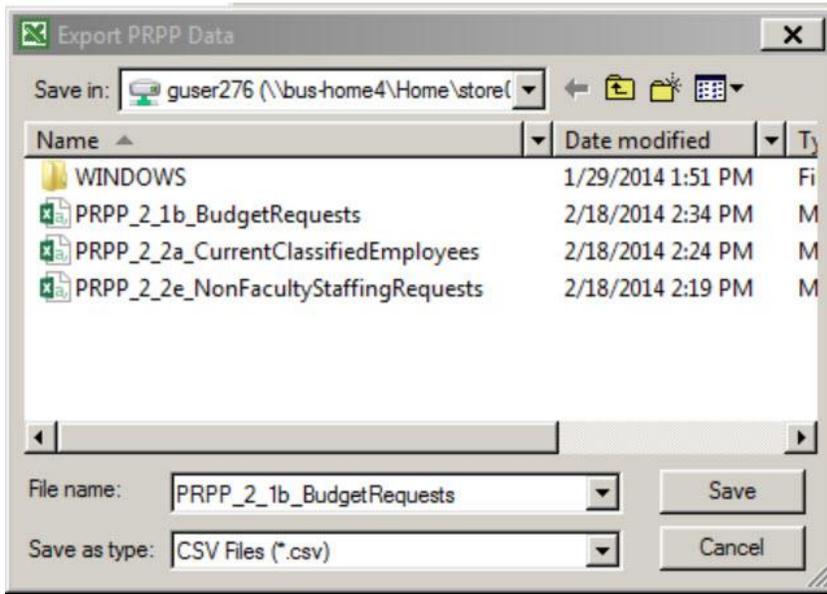


Figure 32: Export PRPP Data Dialog Box

Export PRPP Data

12. To export your spreadsheet data, follow the procedure below:

- 12.1. Click on the **Create CSV Export File** button. The **Export PRPP Data** dialog box should appear.
- 12.2. Click on the **Save** button at the bottom of the **Export PRPP Data** dialog box to save your data file to your Home directory. (See **Figure 32** above.)
- 12.3. A dialog box displaying the name and directory location of the file containing your exported PRPP data should appear. (See **Figure 33** below.)



Figure 33: Dialog Box with File Location of Stored PRPP Data



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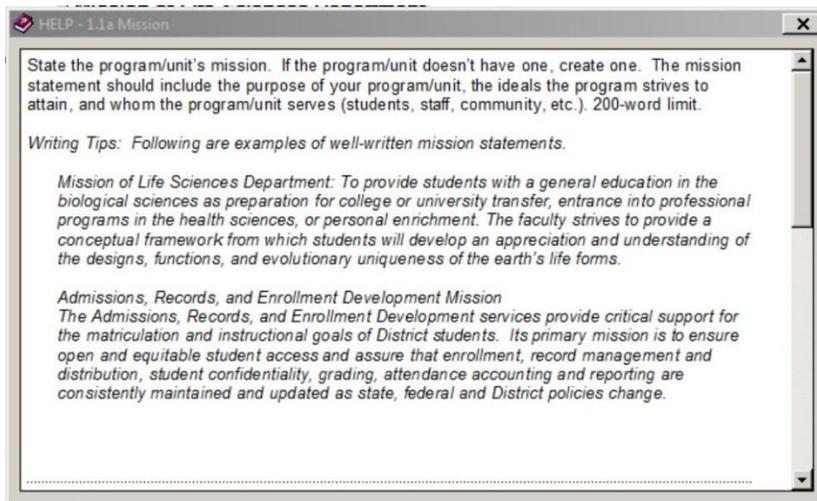
Print Out your PRPP Data Spreadsheet

13. To print out the spreadsheet containing your PRPP data, follow the procedure below:
  - 13.1 Go to the location on your Home directory where the spreadsheet containing your PRPP data was stored.
  - 13.2 Open the MS Excel file (spreadsheet) containing your PRPP exported data.
  - 13.3 Confirm that your printer and MS Excel print options are set correctly for printing out your PRPP spreadsheet data.
  - 13.4 Then, click on the **Print** button in the MS Excel application to print out your PRPP data.

### *Help/Instructions Button*



Displays a Help page from the Writer's Guide for the current section that you are working on in the PRPP Template application. (See **Figure 34** below.)



**Figure 34: Help on the Mission Section**



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### Text Editor Tool Bar

#### NOTE

The tools available in the **PRPP Text Editor Tool Bar** have limited functionality. For more features and options, we recommend that you use the text editor provided with your MS Word application. Then, copy the text from your Word document and paste it into your PRPP template.

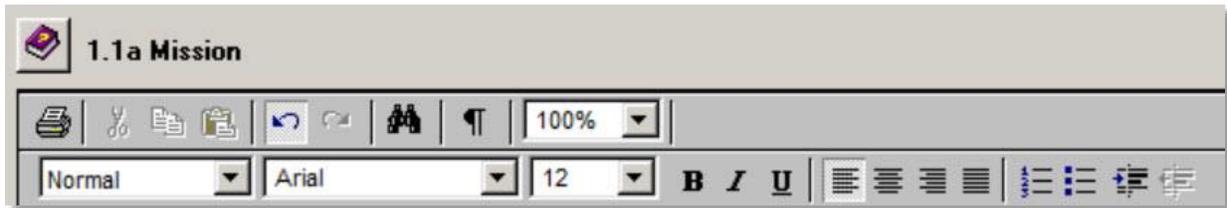


Figure 35: Text Editor Tool Bar

#### NOTE

The **Print** button in the **Text Editor Tool Bar** only prints the current section of the PRPP template that you are working on in the **Text Editor**. To print out your PRPP report, click on the **Create Word Documents** button in the **PRPP Main Tool Bar**. Then, follow **Steps 8.1 to 8.3** above.

[Print out your PRPP report](#)

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