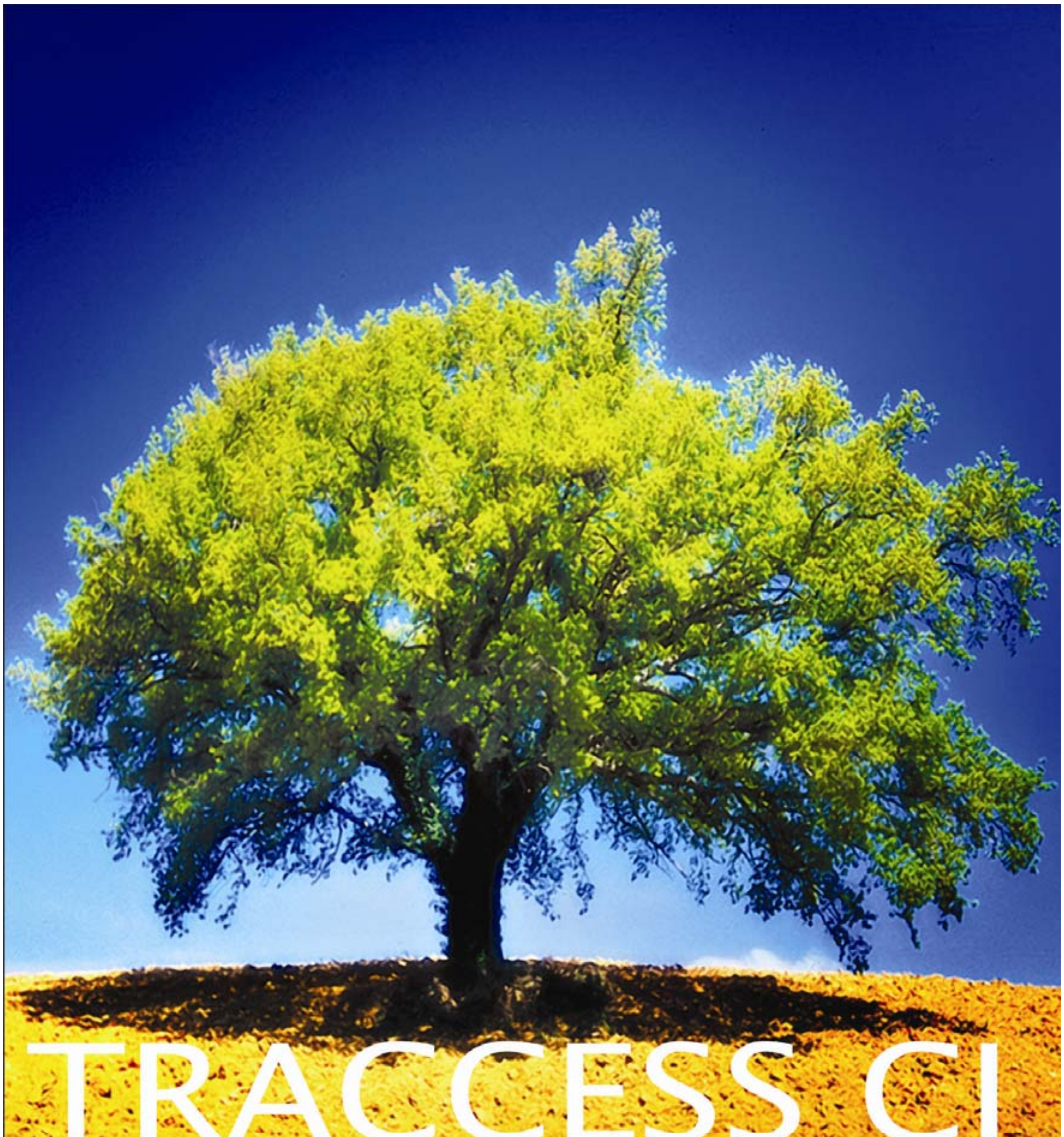


TRACCESS CI

Getting Started Guide

Version 3.0 February 2008

TTG Systems

The Competency Intelligence Leader

Contents

Introduction

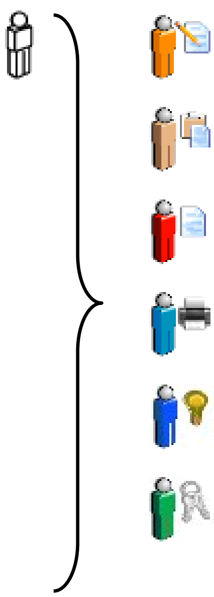
In any organization, to coordinate training, there must be a connection between people and the processes that must be completed. People have access to their Processes through the Organization Units that they belong to. People who access the TRACCESS System are called Employees of the system.

(TRACCESS Employee)

(TRACCESS Organization Unit)

(Processes)

Depending on the functions they must complete in the system, an Employee can have one of six roles:



Learner – accesses the system for the purpose of training only.

Supervisor – oversees a Learner's completion of Processes within the system.

Operational Administrator – manages the Organization structure within the system

Reporter – generates reports within the system.

Subject Matter Expert – manages the Process structure within the system.

System Owner – manages the entire system and exists separately from the overall Organization structure.

The role that a User has within the system dictates where they can be found. For example:

In the Organization Manager, Organization Units contain Learners and Management headings.

Learners – contains Learners only

Management – contains Supervisors, Operational Administrator and Reporters

In the Process Manager, Processes contain a Management heading.

Management – contains Subject Matter Experts

Processes are broken down into several objects.

Process Set

Process

Sub Process

Task – is used for those activities that are considered either complete or incomplete (with no concept of progression). For example: Comply with Dress Code.

Task with Levels – is used for those activities that have the concept of progression. For example: Operate Machinery may have a Basic, Skilled and Mastery level corresponding to Turning the machine on, Fixing the machine or Designing a more efficient way of running machine.

Competence Level – Basic, Skilled or Mastery

A Task, or individual Competence Level, can contain several components:

Task (or Competence Level)

Resources – can be in the form of a Course, URL, or TRACCable Resource.

Knowledge Assessment – a written assessment on the theoretical component of the Task

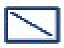
Capability Assessment – a hands-on demonstration to a Supervisor proving practical competence in the Task.

A Task icon can have a different appearance depending on the components it possesses.


Task without a Knowledge or Capability component (under construction)


Knowledge component only


Capability component only


Knowledge and Capability components

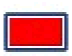

Knowledge and Capability components with durations – duration means that the component must be reviewed over time to remain competent. For example: Comply with Standard First Aid is a task that would contain a duration clock, since the course must be recertified every so often.

Once the master processes have been created which encompass all of the Tasks within the company, derived processes can be created following the concept of inheritance. The concept of inheritance allows administrators/ subject matter experts to design new processes based on existing processes. For example, a process called Comply with Health, Safety and Environmental contains all related Tasks. Certain groups within the system may not be required to complete some of these tasks, or some of the tasks may have to be customized for particular situations. A group that works primarily in the field may require the task Comply with H2S, whereas someone located in the Head Office would not. Two derived processes may be created to customize the learning of each group based on the initial process.

Once the Processes have been input in the system, a Learner's progress is visually displayed using icons and colors to indicate completion states.

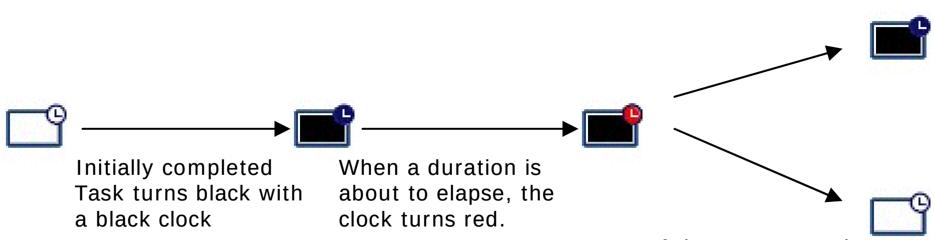

Incomplete


Complete


Revised


High Priority

If a component contains a duration, the sequence of events is as follows:



Initially completed Task turns black with a black clock

When a duration is about to elapse, the clock turns red.

Durations are set on a per task basis, but the warning period for about to elapse is the same for all Tasks. The default period is 30 days, but this can be changed for your installation.

If the component is completed again, the clock goes back to black.

If the component is not touched during the warning period, the entire icon appears turn white.

Configure TRACCESS CI

You have successfully installed the TRACCESS CD and are wondering what to do from here. The defaults in TRACCESS CI are designed so that once the installation is complete, and your network administrators have left the room, the database is ready to be populated. Certain System Options are available within the program to be configured with company preferences, but do not require attention immediately.

Create an Operational Administrator and a Subject Matter Expert

A brand new database has a single default System Owner. If you require that other individuals have the ability to create Organization Units and Processes, you must delegate these functions to an Operational Administrator and a Subject Matter Expert.

Login to TRACCESS as a System Owner

1. Enter your **Employee ID** and **Password** in to TRACCESS CI security screen.

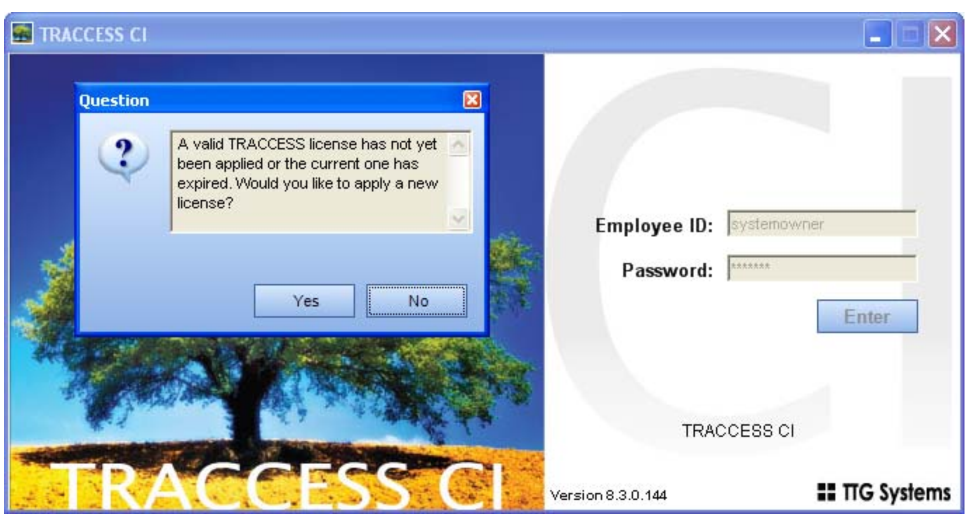
2. Click **Enter** to access the system.

   If it is the first time you access the system as this Employee, you may be prompted to Change Your Password.

Exercise

- Enter the system using the following Employee ID.
  - Employee ID: **SystemOwner**
  - Password: **welcome**

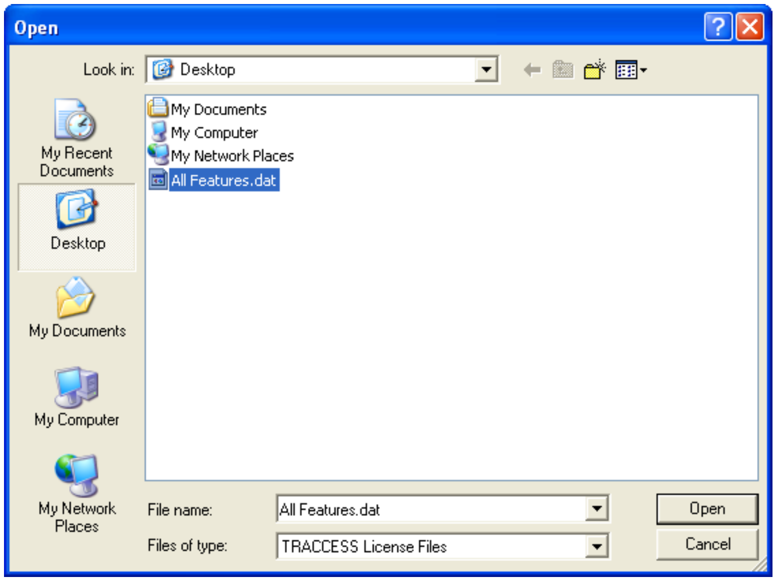
If this is the first time you access the system, or your license file has expired, you will receive the following message:



License File Required

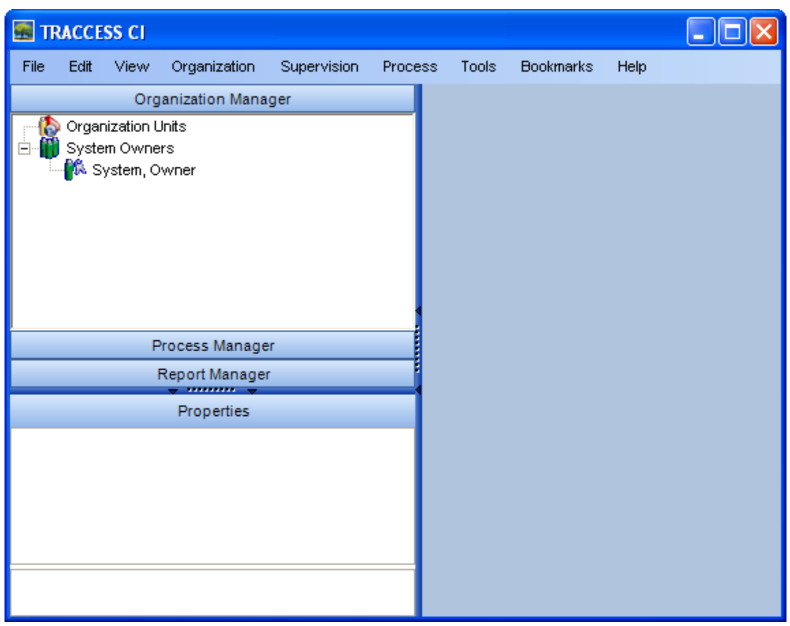
3. Click **Yes**.

   A standard Open dialog appears.



Standard Open dialog

4. Navigate to the *.dat file which has been provided by TTG Systems, and click **Open**.



System Owner's View of TRACCESS CI

As a System Owner, you are the only role that is able to see all trees and all menus/ menu options. All other employees are only able to see the areas that they have access to depending on their role assignments. For example, someone who is only a Subject Matter Expert may not be able to see the Organization Manager, and someone who is only an Operational Administrator may not be able to see the Process Manager.

The System Owner is the only role that sees the root nodes of the Organization Manager and Process Manager – and therefore the Organization Units heading and the Processes heading. An Operational Administrator sees an Assigned Organization Units heading in the Organization Manager, and a Subject Matter Expert sees an Assigned Processes heading in the Process Manager. Because of this, the System Owner must first create an Organization Unit for the future Operational Administrator to manage, and create a Process Set for the future Subject Matter Expert to manage.

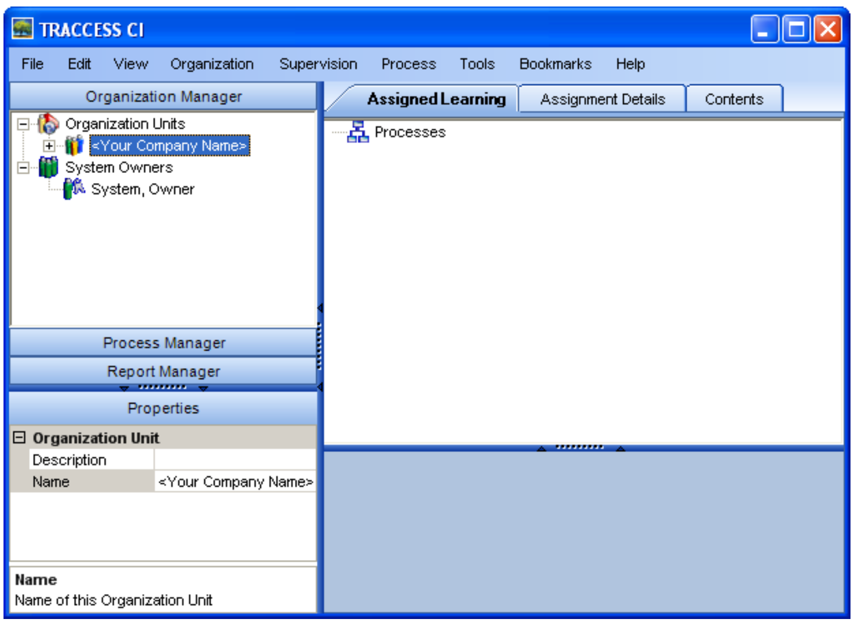
To create an Organization Unit

1. Open the Organization Manager.
2. Right-click on the Organization Units heading and select **New Organization Unit**.

   A new Organization Unit appears in edit mode.
3. Type the name of the new Organization Unit in the highlighted area.

Exercise

- Add an Organization Unit named **<Your Company Name>**



Create an Organization Unit

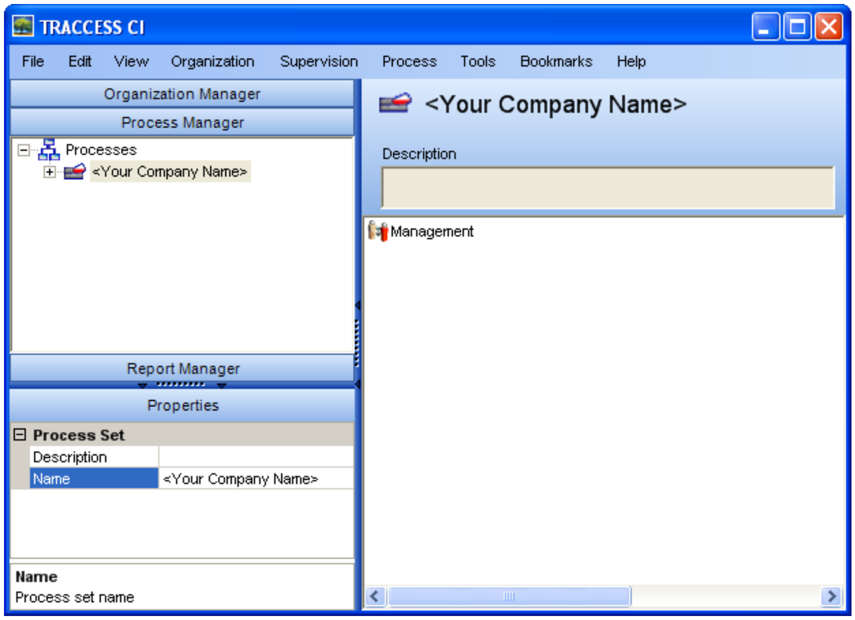
To create a Process Set

1. Open the Process Manager.
2. Right-click on the Processes heading and select **New Process Set**.

   A new Process Set appears in edit mode.
3. Type the name of the new Process Set in the highlighted area.

Exercise

- Create a Process Set named **<Your Company Name>**



Create a Process Set

Now that you have created the objects to be managed, you must now create the employees that manages them. All employees are created in the Organization Manager, in the context of a particular Organization Unit. Once an employee is created in the system, they can then be removed from all Organization Units and become Unassigned.

An Operational Administrator manages the Organization Units and Employees in the Organization Manager, and is therefore added to the Management heading under an Organization Unit.

A Subject Matter Expert manages the Process Sets, Processes, Subprocesses and Tasks in the Process Manager and is therefore added to the Management heading under a Process Set or Process. However, since all employees are created in the Organization Manager, the Subject Matter Expert must either be added to the Learners or Management heading under an Organization Unit. Subsequently, the Subject Matter Expert must be set to manage a particular Process.

To create an Operational Administrator

1. Open the Organization Manager.

2. Expand the desired Organization Unit to view the Management heading.

3. Right-click on Management and select **New Employee**.

   The New Employee dialog appears.

4. Enter the required information (First Name, Last Name, Employee ID), and click **OK**.

   The Add/Remove Roles dialog appears.

5. Select the **Operational Administrator** role and click **>>**.

6. Click **OK**.

   The new employee appears appear under the Management heading with the Operational Administrator icon.

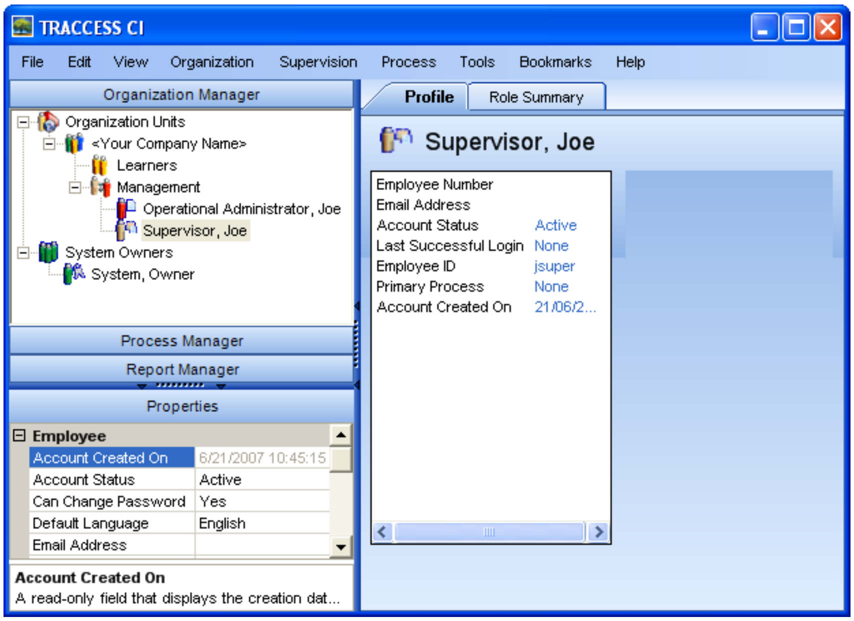
Exercise

- Create an Operational Administrator using the following information:
  - Name: **Joe Operational Administrator**
  - Employee ID: **jadmin**
- Create a Supervisor using the following information:

  Normally, a supervisor would be created by an Operational Administrator within the Organization Manager. However, for demonstration purposes a supervisor is required to be in the system for another section of this document.

  - Name: **Joe Supervisor**
  - Employee ID: **jsupervisor**

  Please note: In TRACCESS CI, an employee can have any number of roles in different Organization Unit contexts. The name "Joe Operational Administrator" is being used for demonstration purposes only, and this employee could also be a Learner, Supervisor, Reporter, and/ or Subject Matter Expert within the system. An employee can even have all three management roles within the same Organization Unit, in which case they would be represented with the multi-role icon.



Create an Operational Administrator

To create a Subject Matter Expert

1. Open the Organization Manager.
2. Expand the desired Organization Unit to view the Learners heading.
3. Right-click on Learners and select **New Employee**.

   The New Employee dialog appears.

4. Enter the required information (First Name, Last Name, Employee ID), and click **OK**.

   The new employee appears under the Learners heading with the corresponding icon.

5. Right-click on the employee and select **Remove**.

   The employee is now in the system, but is unassigned to any Organization Unit. If you had wanted this employee to be a Learner or play a Management role in a particular Organization Unit, removing the employee would not have been required. For demonstration purposes, this employee is being created with a Subject Matter Expert role only.

6. Open the Process Manager.

7. Expand the desired Process Set or Process to view the Management heading.

8. Right-click on the Management heading and select **Add/ Remove Employees**.

   The Add/ Remove Employees for Process dialog appears.

9. Select the Employee, and click **>>**.

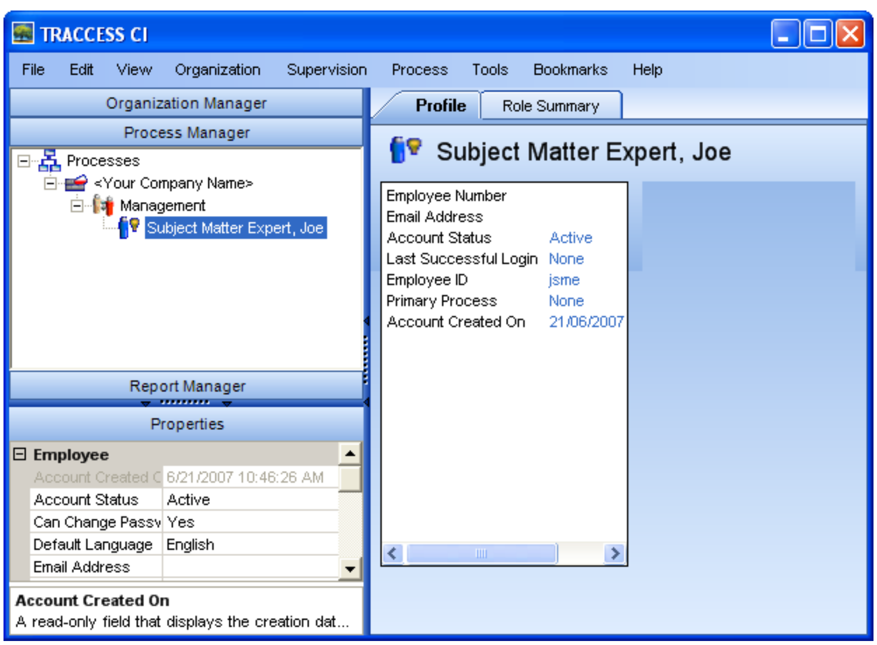
10. Click **OK**.

    The employee appears under the Management heading with the Subject Matter Expert role icon.

Exercise

- Create a Subject Matter Expert using the following information:
  - Name: **Joe Subject Matter Expert**
  - Employee ID: **jsme**

  Please note: In TRACCESS CI, an employee can have any number of roles in different Organization Unit contexts. The name "Joe Subject Matter Expert" is being used for demonstration purposes only, and this employee could also be a Learner, Supervisor, Reporter, and/ or Operational Administrator within the system. An employee can even have all three management roles within the same Organization Unit, in which case they would be represented with the multi-role icon.



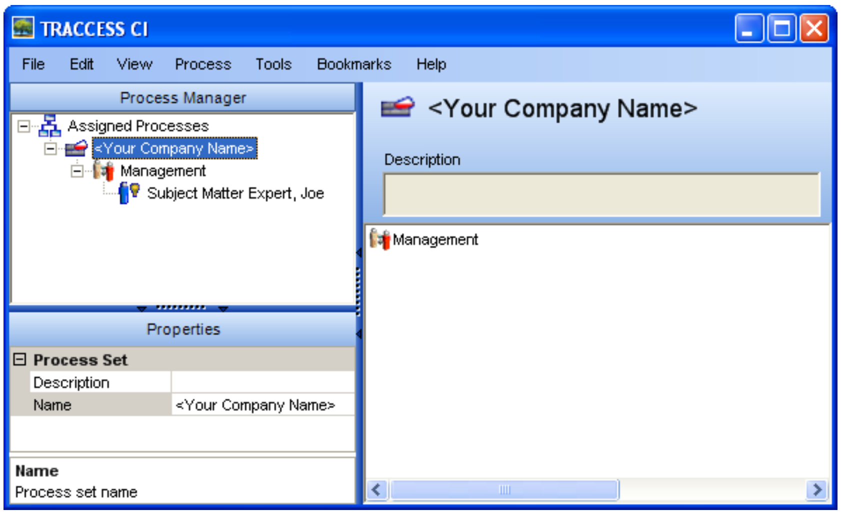
Create a Subject Matter Expert

Now that you have created a Subject Matter Expert and an Operational Administrator, you can instruct these individuals to represent your company's existing processes and tasks, and organization structure respectively within the system.

Use TRACCESS CI to Configure Learning

When a Subject Matter Expert initially logs into the system, they have access to one main tree: the Process Manager.

> **Exercise**
>
> Login to TRACCESS CI as an Subject Matter Expert using the following information:
>
> - Employee ID: jsme
> - Password: (no password required)



Subject Matter Expert's view of TRACCESS CI

There are several differences between the System Owner's view and the Subject Matter Expert's view. For example, several objects are not available in the Subject Matter Expert's view.

- Organization Manager
- Report Manager
- Organization and Supervision menus within the main menu
- Several options within the menus
- SME sees the Assigned Processes heading in the Process Manager (the System Owner saw all of the Processes, and therefore has the Processes heading).

Once the Subject Matter Expert has access to a Process Set or Process, they are allowed to manage everything within the Process (including Sub Processes, Tasks, Resources, Capability Assessments and Knowledge Assessments).

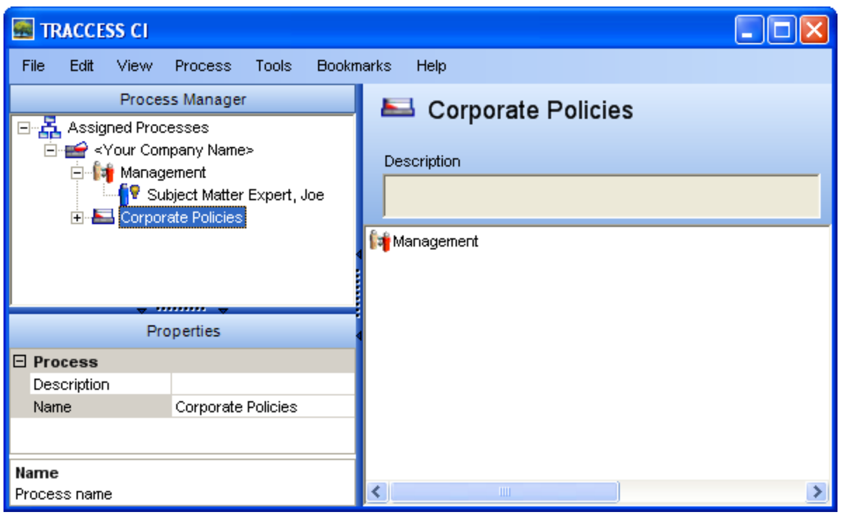
Create a Process, Sub Process, Task and Task with Levels

To create a Process

1. Open the Processs Manager.
2. Right-click on a Process Set and select **New Process**.

   A new Process appears in edit mode.
3. Type the name of the new Process in the highlighted area.

> **Exercise**
>
> - Create a Process named **Corporate Policies**



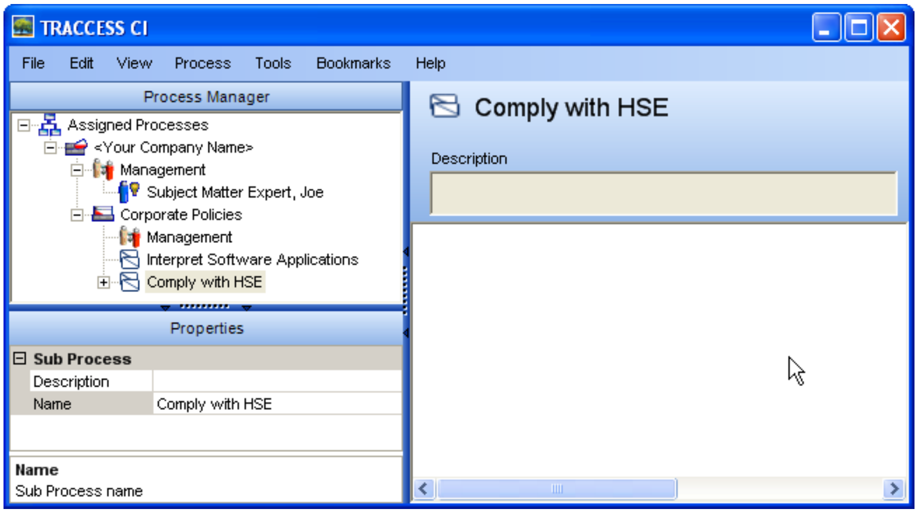
Create a Process

To create a Sub Process

1. Open the Processs Manager.
2. Right-click on a Process and select **New Sub Process**.

   A new Sub Process appears in edit mode.
3. Type the name of the new Sub Process in the highlighted area.

> **Exercise**
>
> - Create the following Sub Processes:
>   - **Interpret Software Applications**
>   - **Comply with HSE**



Create a Sub Process

To create a Task

1. Right-click on the previously-created Sub Process, and select **New Task**.

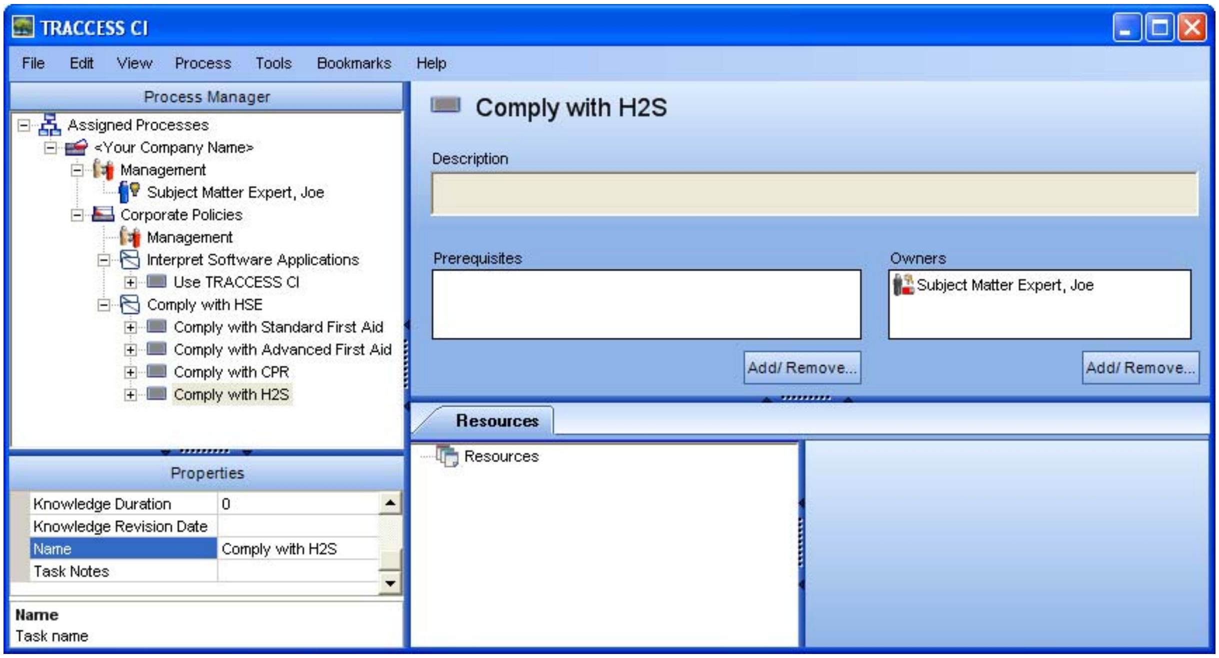
   A new Task appears in edit mode.

2. Type the name of the new Task in the highlighted area.

Exercise

Create the Tasks using the following structure:

- In **Interpret Software Applications** Sub Process:
  - **Use TRACCESS CI**
- In **Comply with HSE** Sub Process:
  - **Comply with Standard First Aid**
  - **Comply with Advanced First Aid**
  - **Comply with CPR**
  - **Comply with H2S**



Create a Task

Create Task Properties

To create a TRACCable Resource

1. Expand the Task to view the Resources heading.
2. Right-click on the Resources heading, and select **TRACCable**.

   A new TRACCable Resource appears in edit mode.

3. Type the name of the new Resource in the highlighted area.
4. In the Properties section, enter the address/ location of the TRACCable resource.

Exercise

Create the URL Resources using the following structure:

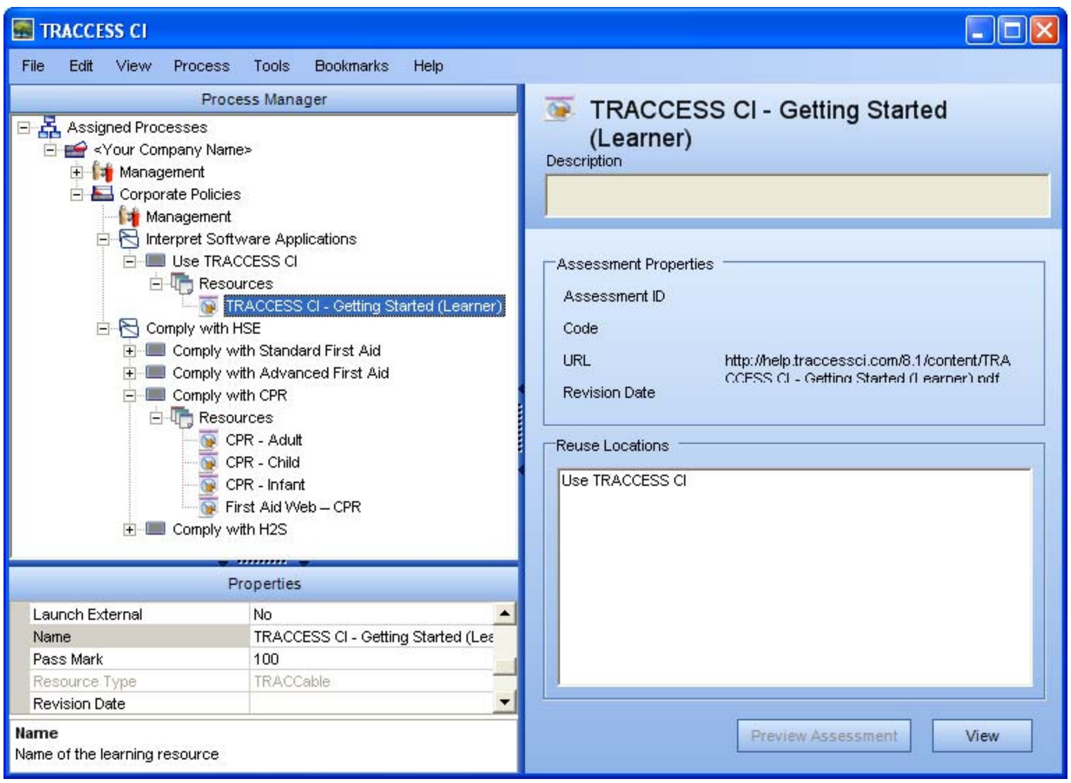
- In **Interpret Software Applications** Sub Process/ **Use TRACCESS CI** Task
  Name: TRACCESS CI Task
  URL: http://help.traccessci.com/8.1/TRACCESS_CI_Getting_Started_Learner.pdf

- In **Comply with HSE** Sub Process/ **Comply with CPR** Task
  Name: First Aid Web – CPR
  URL: http://www.firstaidweb.com/cpr.php

  Name: CPR – Adult
  URL: http://www.firstaidweb.com/adult.php

  Name: CPR – Child
  URL: http://www.firstaidweb.com/child.php

  Name: CPR – Infant
  URL: http://www.firstaidweb.com/infant.php



Add / Create a TRACCable Resource

To add/ create a Knowledge Assessment

1. Above the knowledge Assessment tree, check the **Use Question Filter.**

   To create more room to work with the Knowledge Assessment, double-click on the blue splitter bar which separates the trees with their context views. The context view expands to take the place of the trees.

2. Right-click on the Task and select **Add Knowledge Assessment**.

3. Enable the **Use Question Filter**.

4. Uncheck the **Requalifier** field.

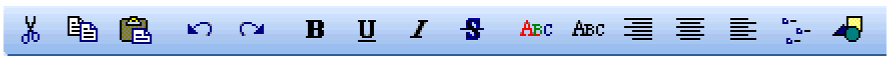
5. Right-click on the Knowledge Assessment heading and select **New Question** (or click the button).

   A generic New Question appears. This is actually the Question Description, which can be modified in the Knowledge Assessment context view.

   In the Knowledge Assessment, there is a Question Description and Question Text. These are not the same object. Since the Question Text can now be formatted, and can include images, this type of information cannot be stored in a tree view. Both fields are edited in the Knowledge Assessment context view.

6. In the Knowledge Assessment context view, type the question text and press **<Enter>**.

7. Using the toolbar, format the text as desired.

8. (*optional*) Click the button to insert an image into the Question Text.

9. In the Knowledge Assessment tree, expand the Question Description to view its answers.

10. Select each answer, and in the Knowledge Assessment context view, edit the answer text.

11. To change the correct answer, double-click the next to the correct answer.

    The changes to a .

12. (*optional*) To remove answers from a question, right-click on the answer and select **Delete**.

13. (*optional*) To add answers to a question, right-click on the question and select **New Answer**.

14. With the question selected, set the desired **Properties** for the question.

Create Knowledge Assessment using Imported Questions

1. Right-click on the Task and select **Add Knowledge Assessment**.

2. In the Knowledge Assessment context view, click **Import**.

   The Select Import File dialog appears.

3. Select the format (TRACCESS 7.x or TRACCESS CI) of the file you are importing.

4. Click **Browse**.

5. Navigate to the file path, select the file and click **Open**.

   The questions will import into the Knowledge Assessment editor.

6. Click **OK**.

To put the Knowledge Assessment online

1. Ensure that there is at least one Possible question for both Practice and Final Assessments.

   A Possible question means that it becomes part of the test bank and may be used in the test. A Mandatory question means that it becomes part of the test bank and must be used in the test. If you have a mandatory question-this "trumps" a Possible question – and your minimum requirements have been met for putting the test online.

2. Highlight the Task in the tree.
3. In the Properties section, set the **Has Knowledge Component** property to **Yes**.

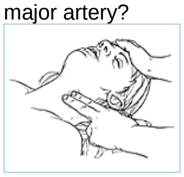
   The task icon changes from (indicating that there is neither a Knowledge nor a Capability component associated with the Task) to (indicating that there is a Knowledge component associated with the Task).

4. Select the Knowledge Assessment node.
5. In the Properties section, set the **Online** property to **Yes**.

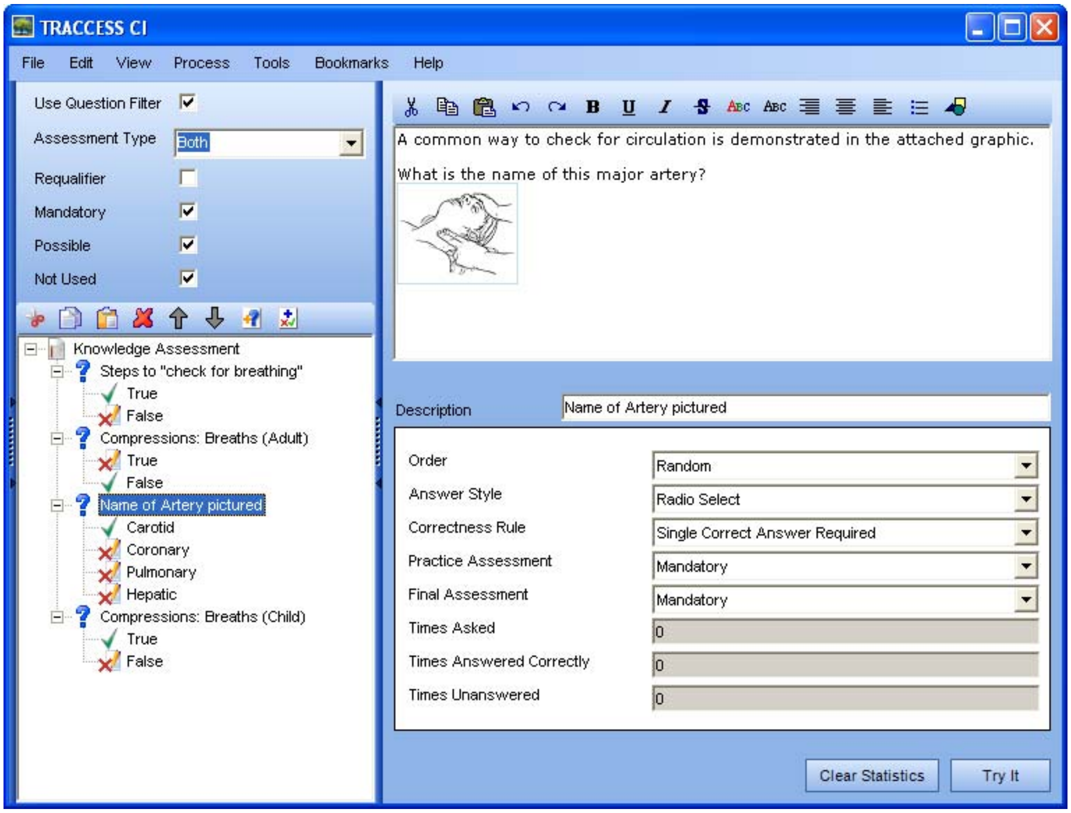
Exercise

Create the following Knowledge Assessment in the **Comply with CPR** task:

- The three steps to “check for breathing” are “Look, Listen and Feel”.
  - True (✓)
  - False
- The number of compressions to breaths for an adult is 20:2.
  - True
  - False (✓)
- The number of compressions to breaths for a child is 5:1.
  - True (✓)
  - False
- A common way to check for circulation is demonstrated in the attached graphic. What is the name of this major artery?

  (graphic can be found on the following page http://www.firstaidweb.com/child3.php)
  - Carotid (✓)
  - Coronary
  - Pulmonary
  - Hepatic
- Set at least one question as Mandatory for each the Practice Assessment and Final Assessment.
- Place the Knowledge Assessment online.



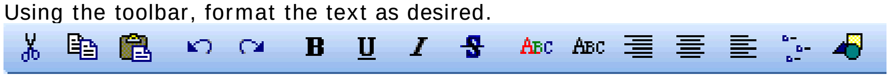
Add/ Create a Knowledge Assessment – Put the Knowledge Assessment Online

To add/ create a Capability Assessment

1. Right-click on the Task and select **Add Capability Assessment**.
2. In the context view, select the **Action Editor** tab.
3. Click **Add**.

   A generic New Action appears in edit mode.

4. Type the action text and click **<Enter>**.
5. In the Action Details section, enter the steps required to complete the selected action.
6. Using the toolbar, format the text as desired.



To add Experts

1. In the context view, click the Properties tab.
2. Click **Add/ Remove Experts**.

   The Add/ Remove Experts dialog appears.

3. Select the experts for this capability assessment, and click **>>**.
4. Click **OK**.

   The names of the selected employees appear in the Experts box in the context view.

To make the Capability Assessment accessible/ Put it "online"

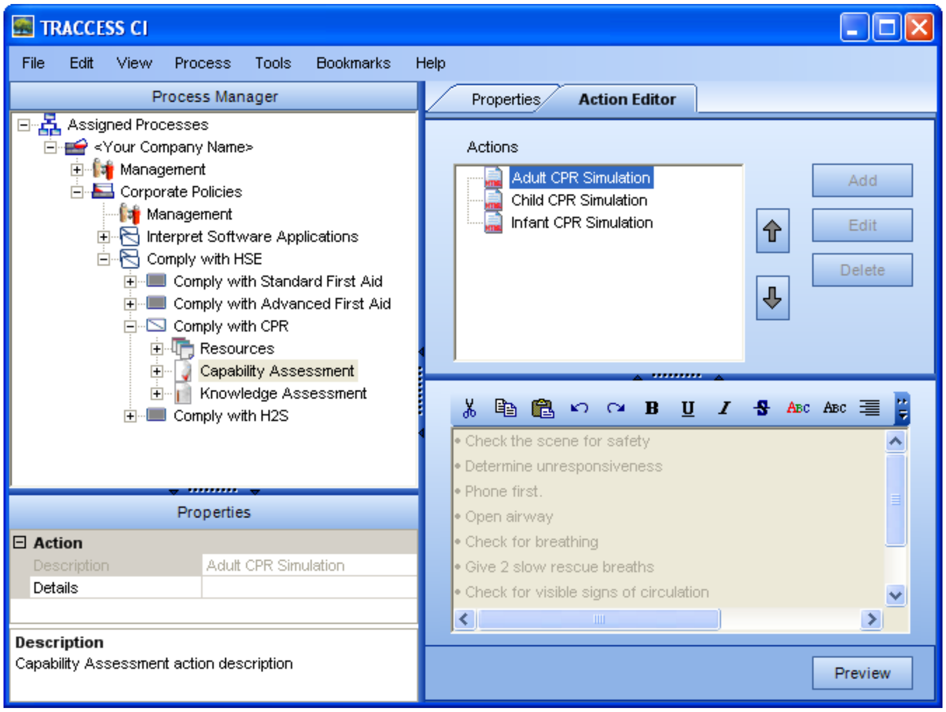
1. Highlight the Task in the tree.
2. In the Properties section, set the **Has Capability Component** property to **YES**.

   The task icon changes from (indicating that there is a Knowledge component only) to (indicating that there are both Knowledge and Capability components).

Exercise

Create the following Capability Assessment:

- Adult CPR Simulation
  - Check the scene for safety
  - Determine unresponsiveness
  - Phone first.
  - Open airway
  - Check for breathing
  - Give 2 slow rescue breaths
  - Check for visible signs of circulation
  - Give 15 chest compressions followed by 2 breaths
  - Check for visible signs of circulation after 4 sets (15:2)
  - Continue with sets of 15:2 until adult starts breathing or until medical help arrives
- Child CPR Simulation
  - Check the scene for safety
  - Determine unresponsiveness
  - Phone first.
  - Open airway
  - Check for breathing
  - Give 2 slow rescue breaths
  - Check for visible signs of circulation
  - Give 5 chest compressions followed by 1 breath
  - Check for visible signs of circulation after 20 sets (5:1)
  - Continue with sets of 5:1 until child starts breathing or until medical help arrives
- Infant CPR Simulation
  - Check the scene for safety
  - Determine unresponsiveness
  - Phone first.
  - Open airway
  - Check for breathing
  - Give 2 slow rescue breaths
  - Check for visible signs of circulation
  - Give 5 chest compressions followed by 1 breath
  - Check for visible signs of circulation after 20 sets (5:1)
  - Continue with sets of 5:1 until infant starts breathing or until medical help arrives.
- Assign **Joe Supervisor** as an Expert for this Capability Assessment
- Place the Capability Assessment **Online**.



Add / Create a Capability Assessment – Put the Capability Assessment Online

To create a Derived Process

1. Open the Process Manager.

2. Right-click on the Processes heading, or on a Process Set, and select **New Derived Process**.

   The Select Base Process dialog appears.

3. Highlight the Process you wish to use as a Base for your new Derived Process, and click **OK**.

   A new derived Process appears in edit mode. The Process name is Derived Process: Base Process.

4. Type the name of the new Derived Process in the highlighted area and press **<Enter>**.

To show/ hide Tasks

1. Expand the Process and Sub Process to view individual Tasks.

   Sub Processes and Tasks that are inherited by the Base Process appear in italics.

2. Right-click on a Task, and select **Hide Task** (*a hidden task appears in grey font*)
   – OR –
   Right-click on a previously-hidden Task, and select **Show Task**.

To create Tasks/ Tasks with Levels/ To add/ remove existing Tasks to the Derived Process

1. (*optional*) Right-click on the Process and select **New Sub Process**.

   To create a Sub Process in the Derived Process, that does not exist in the base Process. This Sub Process appears in normal font.

2. (optional) Right-click on the Sub Process and select **New Task** (or **New Task with Levels**).

To create a Task (or Task with Levels) in the Derived Process, that does not exist in the base Process. This task appears in normal font.

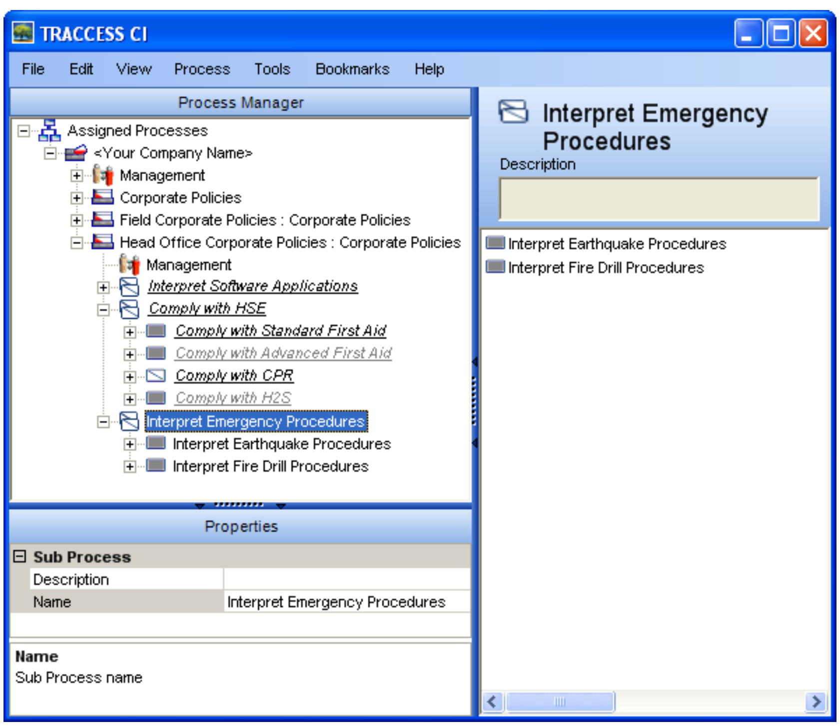
3. (*optional*) Right-click on the Sub Process and select **Add/ Remove Tasks** (or **Add/ Remove Tasks with Levels**). Select Tasks to add to the Sub Process, click >>, and click OK.

   The Add/ Remove Tasks (or Add/ Remove Tasks with Levels) dialog appears. The added Tasks appear in normal font.

Exercise

Create the Derived Processes using the following information:

- Create two Derived Processes, using **<Your Company Name> Corporate Policies** as your Base Process.
  - Derived Process 1:
    Name: **Field Company Policies**
  - Derived Process 2
    Name: **Head Office Company Policies**
- In **Head Office Company Policies** Derived Process
  - Hide the Tasks
    Comply with H2S
    Comply with Advanced First Aid
  - Create the Sub Process **Interpret Emergency Procedures** with the following tasks
    Interpret Earthquake Procedures
    Interpret Fire Drill Procedures



Create a Derived Process – Show/ Hide Sub Processes and Tasks – Add Tasks

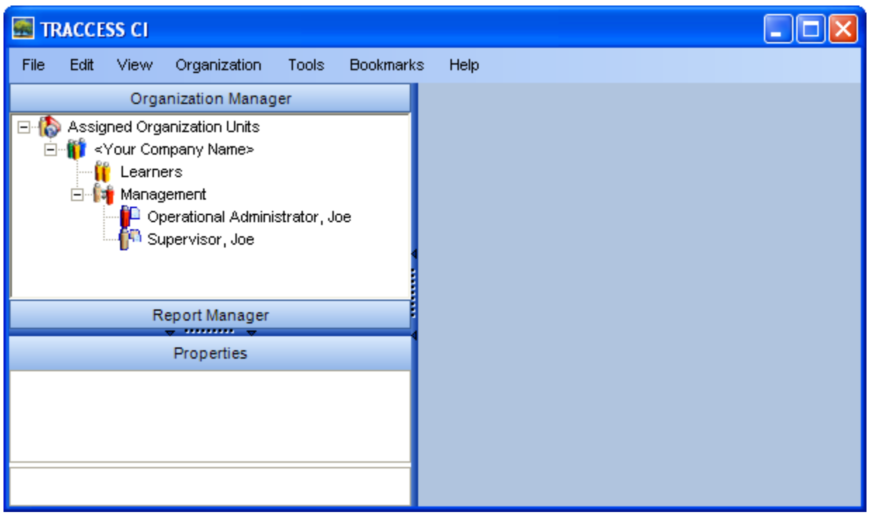
Use TRACCESS CI to Organize and Administrate Employees

When an Operational Administrator initially logs into the system, they have access to one main tree: the Organization Manager.

Exercise

Login to TRACCESS CI as an Operational Administrator using the following information:

- Employee ID: jadmin
- Password: (no password required)



Operational Administrator's view of TRACCESS CI

There are several differences between the System Owner's view and the Operational Administrator's view. For example, several objects are not available in the Operational Administrator's view.

- Process Manager
- Process menu within the main menu
- Several options within the menus
- Operational Administrator sees the Assigned Organization Units heading in the Organization Manager (the System Owner saw all of the Organization Units, and therefore has the Organization Units heading).

Once the Operational Administrator has access to a Organization Unit, they are allowed to manage everything within the Organization Unit (including creating nested Organization Units, creating Learners and creating Management employees).

Create Organization Units, Employees with Learner roles, and Employees with Management roles

To create an Organization Unit

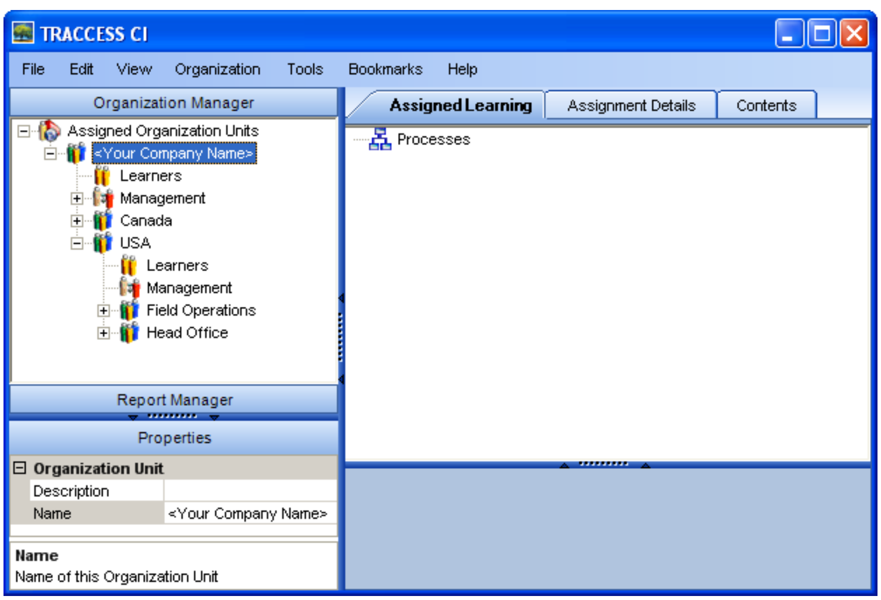
1. Open the Organization Manager.
2. Right-click on the Organization Unit, and select **New Organization Unit**.

   A new Organization Unit appears in edit mode.
3. Type the name of the new Organization Unit in the highlighted area and press **<Enter>**.
4. Follow the same steps to create another nested Organization Unit of the newly created Organization Unit.

Exercise

Under the **<Your Company Name>** Organization Unit, create the Organization Units with the following structure:

- Canada
  - Field Operations
  - Head Office
- USA
  - Field Operations
  - Head Office



Create Organization Units

Create Employees as Learners

1. Expand the Organization Unit to view the Learners heading.

2. Right-click on Learners, and select **New Employee**.

   The New Employee dialog appears.

3. Enter the appropriate information (i.e., **First Name**, **Last Name**, **Employee ID**), and click **OK**.

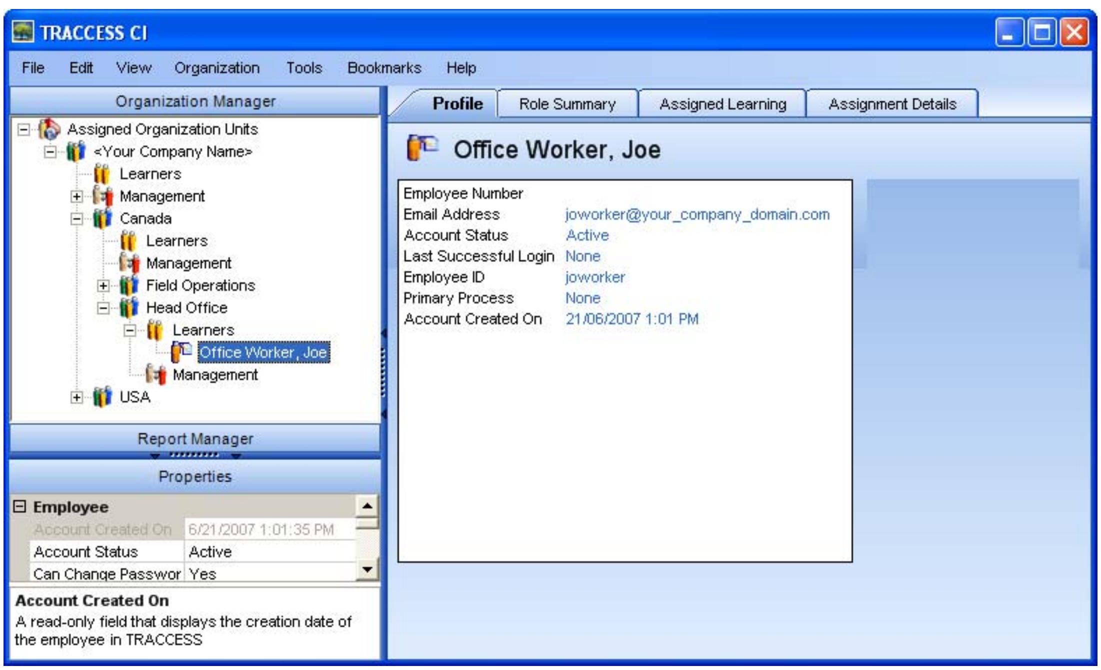
   If you wish to use the Messaging or Feedback features, ensure that a valid email is entered for each Employee.
   The new Employee appears under the Learners heading.

Exercise

Create Learners with the following properties:

- Name: **Joe Field Operator**
  - Employee ID: **jfoperator**
  - Email address: jfoperator@your_company_domain.com
  - Organization Unit: **Canada / Field**

- Name: **Joe Office Worker**
  - Employee ID: **joworker**
  - Email address: joworker@your_company_domain.com
  - Organization Unit: **Canada / Head Office**



Create Learners

To create Employees with Management roles

1. Expand the Organization Unit to view the Management heading.

2. Right-click on Management, and select **New Employee**.

   The New Employee dialog appears.

3. Enter the appropriate information (i.e., **First Name**, **Last Name**, **Employee ID**), and click **OK**.

   If you wish to use the Messaging or Feedback features, ensure that a valid email is entered for each Employee.
   The Role Selection dialog appears.

4. Highlight the desired role, click **>>** and click **OK**.

   The new Employee appears under the Management heading.

To modify an Employee's personal properties

1. Highlight the Employee.

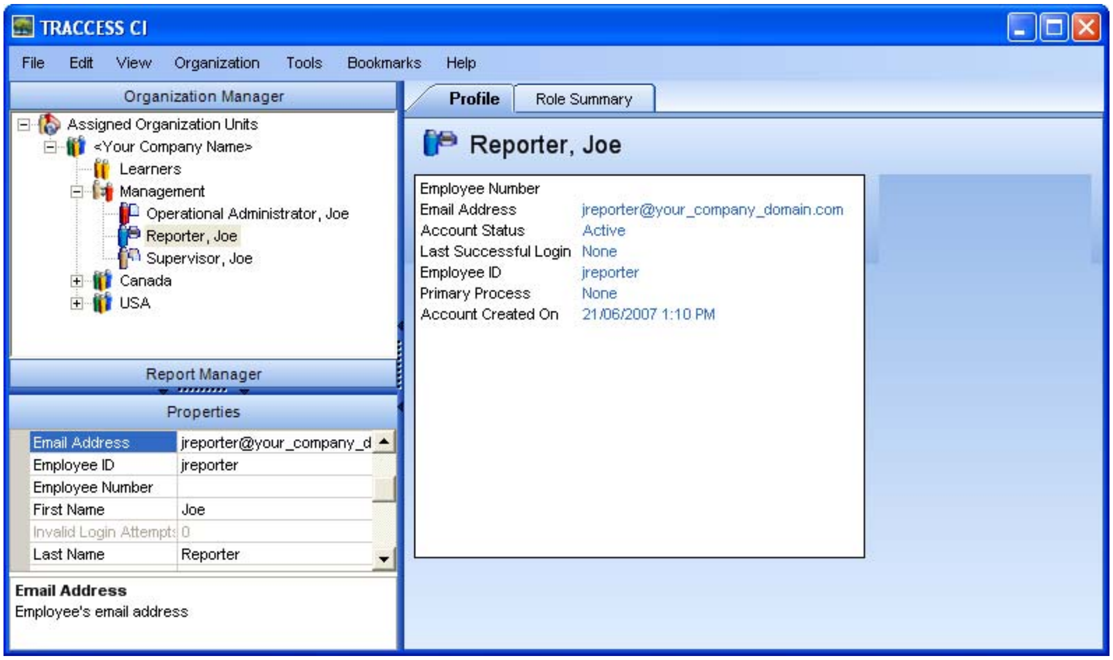
2. In the Properties section, highlight the field whose information you wish to modify.

3. Enter the new information in the space provided (i.e., certain information is modified directly next to the property name, other properties have a ... button to open an edit box).

Exercise

- Create the Employee with the following properties:
  - Name: **Joe Reporter**
  - Employee ID: **jreporter**
  - Email address: jreporter@your_company_domain.com
  - Organization Unit: **<Your Company Name>**

- Access the following Employee, and change his email address:
  - Name: **Joe Supervisor**
  - Email: change to **<your email address>**
    (Changing Joe Supervisor's email address to your email address allows you to receive a capability assessment request).



Create Management Employees

Assign Learning

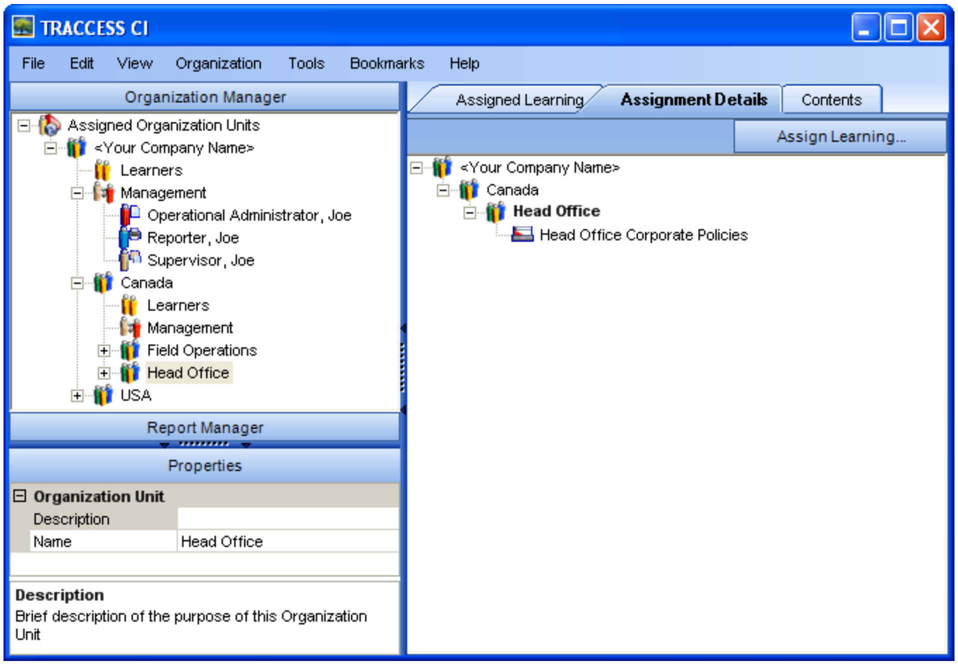
1. Highlight the Organization Unit in the tree control.
2. In the context view, click the **Assignment Details** tab.
3. Click the **Assign Learning** button.

   The Assign Learning dialog appears.
4. Check the checkbox next to the Process Set or Process you wish to assign to this Organization Unit.
5. Click **OK.**

Exercise

- Set learning assignments to Organization Units using the following parameters:
  - Organization Unit: **Canada / Field Operations**
  - Process: **Field Company Policies**

  - Organization Unit: **Canada / Head Office**
  - Process: **Head Office Company Policies**



Assign Learning to Organization Units

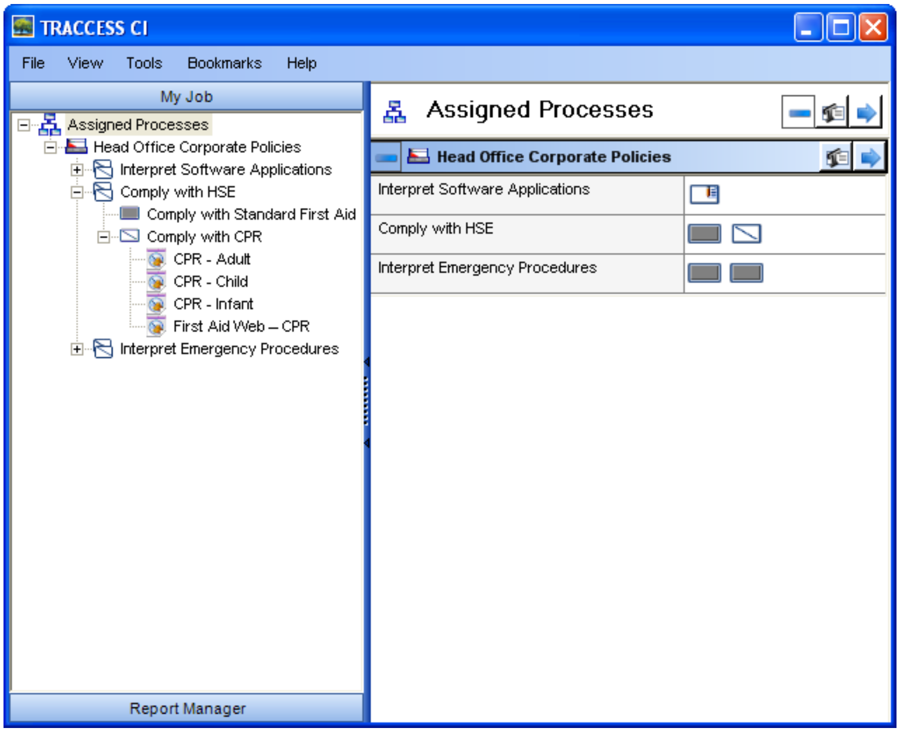
Use TRACCESS CI to Learn

When a Learner initially logs into the system, they have access to two main trees: My Job and the Report Manager.

Exercise

Login to TRACCESS CI as a Learner using the following information:

- Employee ID: joworker
- Password: (no password required)



Learner's view of TRACCESS CI

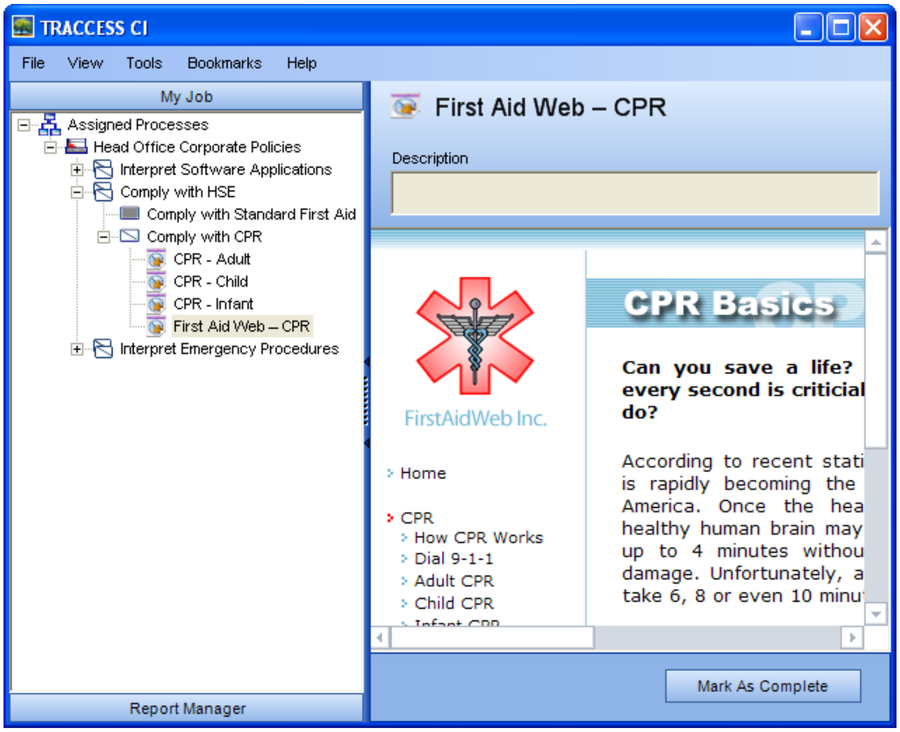
From here, the Learner can access certain functionality.

- View Assigned Learning
- View Task Resources
- Take Knowledge Assessments
- View/ Request Capability Assessments
- Generate Self Qualification Reports

View the Assigned Learning/ Resources/ Take Knowledge Assessment/ View/ Request Capability Assessment

View the Assigned Learning/ Resources

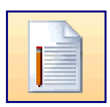
1. Open My Job.
2. Expand the Process Sets, Processes, Sub Processes and Tasks.
3. Click on a Task to view its properties in the context view.
4. Expand a Task to view its Resources.
5. Select a Resource to display it in the context view.



View Assigned Learning – View Task Resources

Take Knowledge Assessments

1. Select a Task in the tree to view the Task context view.

2. In the context view, click the  button.

   The Take Knowledge Assessment dialog appears.

3. Select either **Practice** or **Final**.

   The Knowledge Assessment presenter appears.

   *If you select **Practice**, you can take the assessment as many times as desired without the marks being recorded.*

   *If you select **Final**, once the Assessment is submitted, the mark is recorded, and it counts as an Assessment attempt. However, in TRACCESS CI, Learners can now save assessments and return to complete them at a later time.*

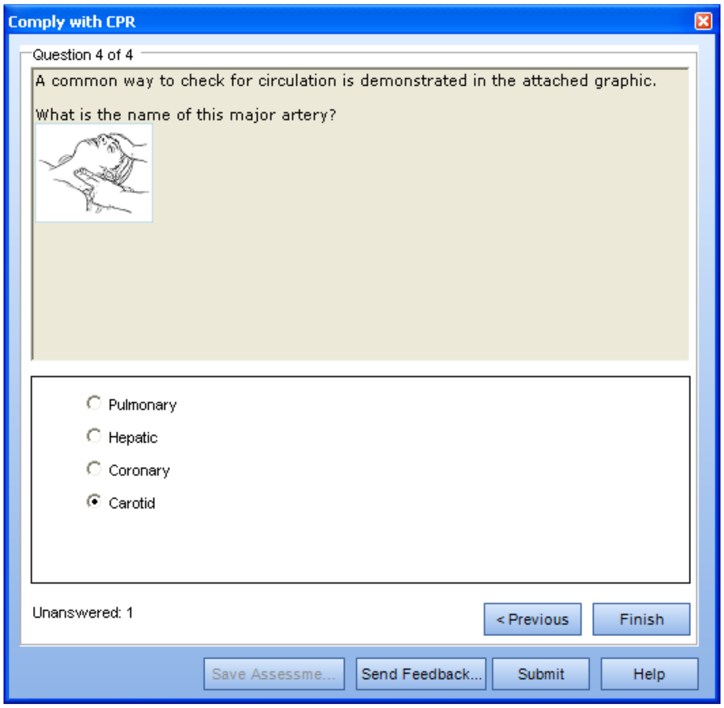
   If a Final Assessment is submitted, and the pass mark is attained, the Knowledge portion of the Task icon turns black.

4. Navigate through the assessment questions.

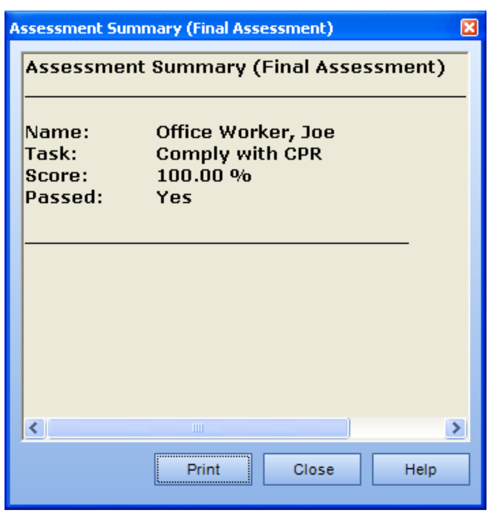
5. Click Submit when completed.

Exercise

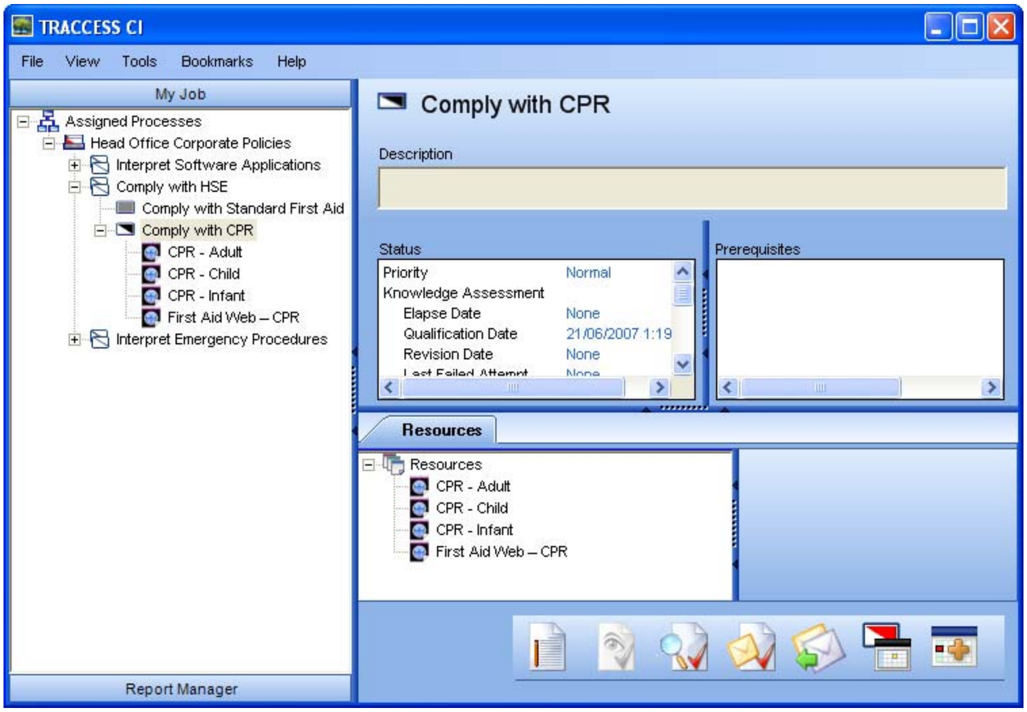
- For the **Use TRACCESS CI** Task:
  - View the TRACCable Resource and mark it as complete
- For the **Comply with CPR** task:
  - View the TRACCable Resources and mark them as complete
  - Take the **Final Assessment** (and pass it!)



Knowledge Assessment Presenter – Final Assessment



Final Assessment Summary



Knowledge Assessment Completed – Task Context View

View/ Request Capability Assessment

1. Select a Task in the tree to view the Task context view.
2. In the context view, click the  button, (or right-click on the Task and select **View Capability Assessment**).

   The Capability Assessment appears.

3. Once you are confident that you are able to complete the actions within the Capability Assessment, click the  button, (or right-click on the Task and select **Request Capability Assessment**).

   The Select Recipients dialog appears.

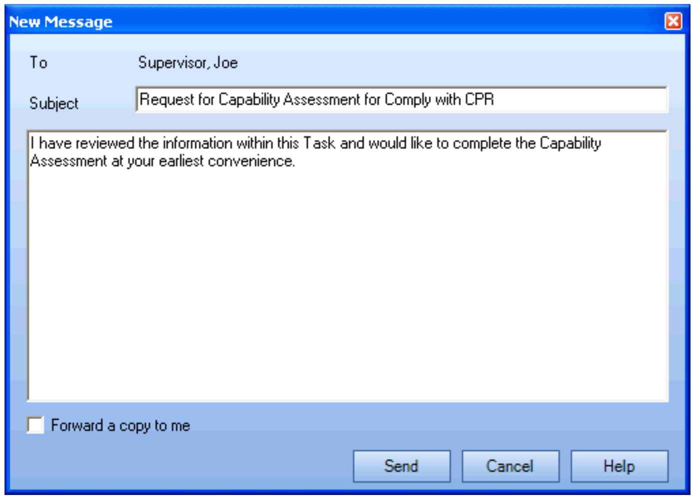
4. Select a person to supervise your Capability Assessment, and click **OK**.

   The New Message dialog appears.

5. Enter text in the Subject and Message body, indicating that you wish to complete a Capability Assessment.

Exercise

- For the **Comply with CPR** task, request a Capability Assessment from **Joe Supervisor**.

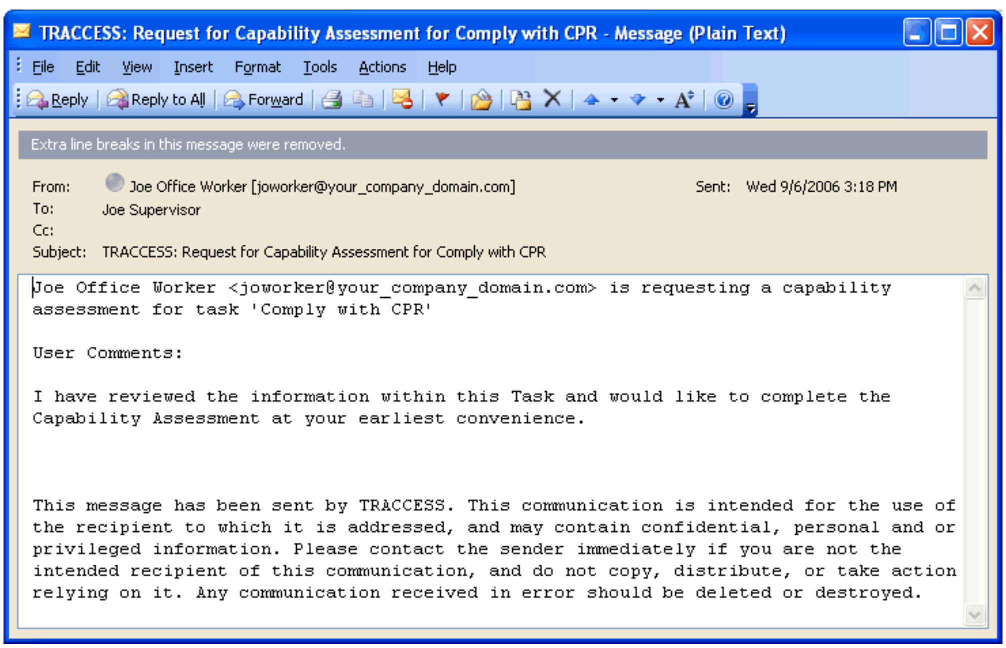


Request a Capability Assessment

Use TRACCESS CI to Supervise Learning

Retrieve Message from external mail server

1. Open your external mail server (email address that was used in TRACCESS).
2. Read the contents of the message from the TRACCESS Employee.



Retrieve a Capability Assessment Request via External Email

To complete a Capability Assessment for a Learner

1. Open TRACCESS CI using your Employee ID and Password.

   Please Note: You must be logged in as a Supervisor, Operational Administrator or System Owner to complete Capability Assessments

2. Open the Organization Manager.
3. Expand the Organization Unit and Learners heading in which the Employee is a member.
4. Select the Employee.
5. In the context view, click the Assigned Learning tab.
6. Select the Process in which the Task is located.

   The Sub Processes are displayed in the bottom of the context view.
7. Click the "+" next to the desired Sub Process.
8. Right-click on the Task, and select **Open Capability Assessment**.

   The Capability Assessment dialog appears.
9. Enter your name in the Expert field.
10. Click the **Date** button.

    A Calendar dialog appears.
11. Enter the date that the Capability Assessment was completed.
12. (*optional*) Enter any relevant Comments.
13. Click **Save**.
14. Repeat steps 9-14 for each Action.
15. Click **Submit Pass** or **Submit Fail** to complete the Capability Assessment.

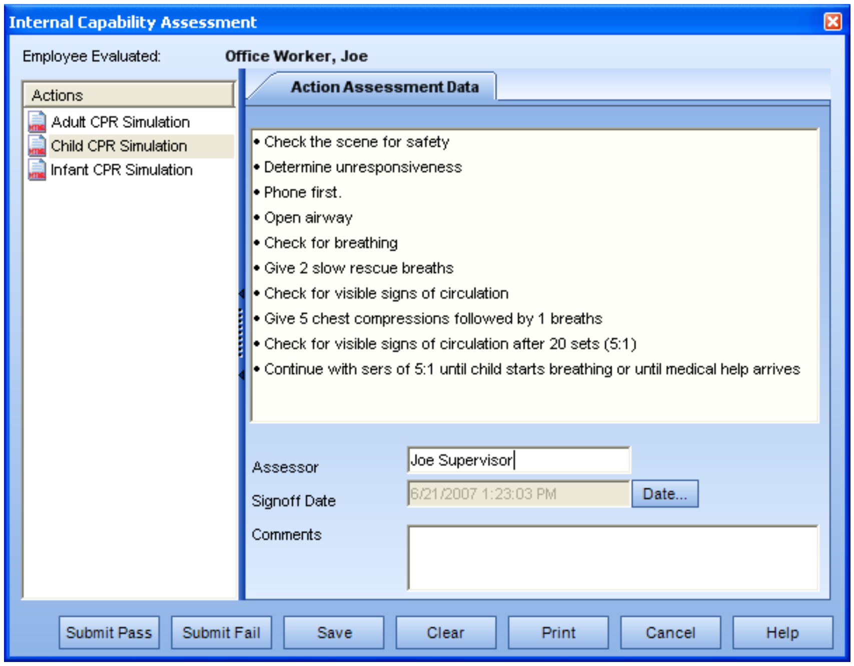
    The Capability Assessment can also be saved, if there is not enough time to complete the entire assessment at once, or if there is to be a different expert for different actions.

    The Submit Pass/ Submit Fail dialog appears.
16. Enter a date, your Employee ID, and password to save the Capability Assessment.

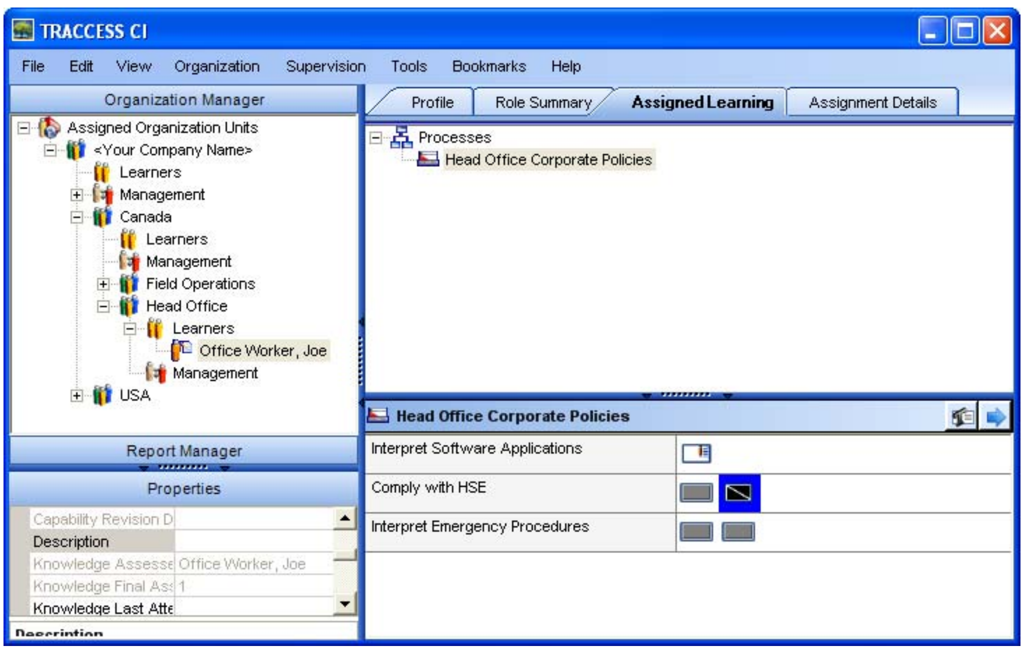
    If Submit Pass was selected, the capability portion of the Task turns black.

Exercise

- Login as Joe Supervisor using the following information:
  - Employee ID: jsuper
  - Password: (no password required)
- For **Joe Office Worker**, on the **Comply with CPR** task:
  - View the Capability Assessment
  - Complete a Capability Assessment (and **Submit Pass**!)



Capability Assessment Presenter



Capability Assessment Completed – Supervisor View

To create an Employee with multiple roles

Within an Organization structure, an employee may play the role of Learner in one Organization Unit, the role(s) of Reporter, Supervisor, Operational Administrator, and Subject Matter Expert in others (and any combination therein). For example, Eugene Campbell is the President of your company. He resides in Canada and works in the Marketing and Sales department, where he must be up to date with the newest sales procedures and marketing trends. As president, he not only wants to report on the learning progress of the Marketing and Sales department, but also the entire company. When in the field, he supervises Learners, as well as creating new Organization Units with company expansion. His knowledge of Sales makes him the Subject Matter Expert, although he defers creation of the Marketing materials to another employee on his team.

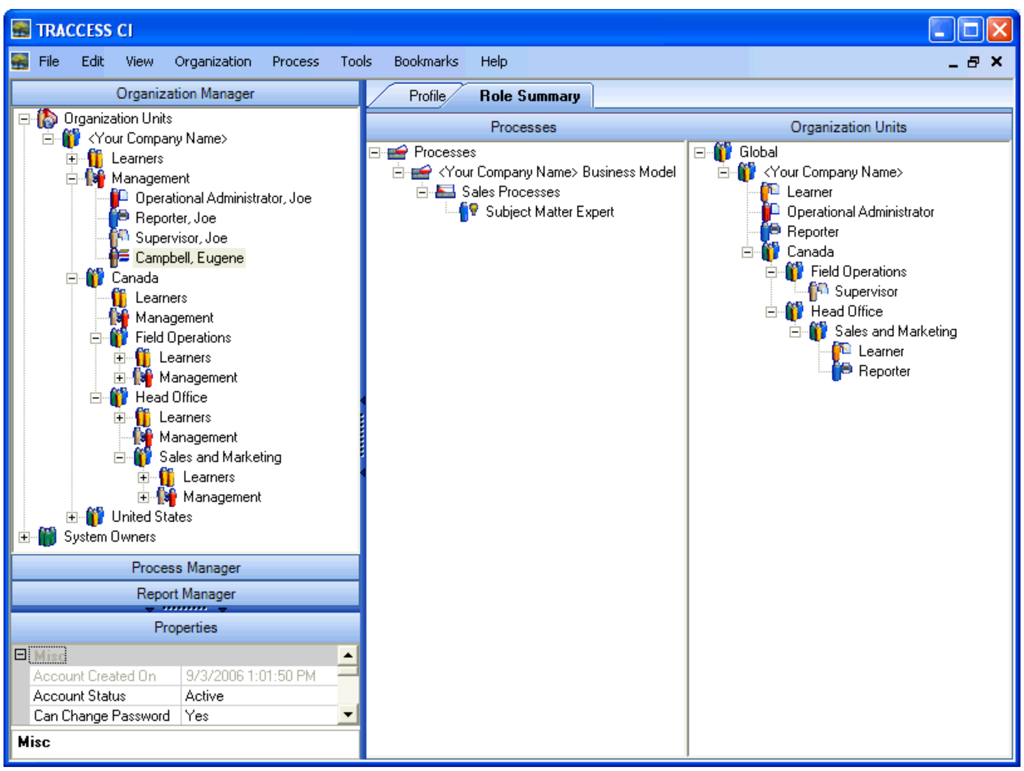
The following exercise inputs the above example in TRACCESS CI terms.

Exercise

Login to TRACCESS CI as a System Owner, in order to access all of the functionality at once.

- Employee ID: **SystemOwner**, Password: **welcome**
- Create an Organization Unit within **Canada/ Head Office** called **Sales and Marketing**.
- Create an Employee with **<Your Company Name>** Organization Unit
  - Name: **Eugene Campbell**
  - Employee ID: **ecampbell**
  - Organization Unit/ Role: **<Your Company Name>/ Reporter, Operational Administrator**
  - Organization Unit/ Role: **Sales and Marketing/ Reporter, Learner**
  - Organization Unit/ Role: **Field Operations/ Supervisor**
- Create two Processes: **Sales Procedures** and **Marketing Procedures**
  - Process/ Role: **Sales Procedures/ Subject Matter Expert**
- Assign the **Sales Procedures** and **Marketing Procedures** as Learning to the **Sales and Marketing** Organization Unit

Selecting the Employee with multiple roles displays the Employee context view. Clicking on the Role Summary tab shows the Processes and Organization Units the Employee is a member of, and the Employee's role within this particular context.

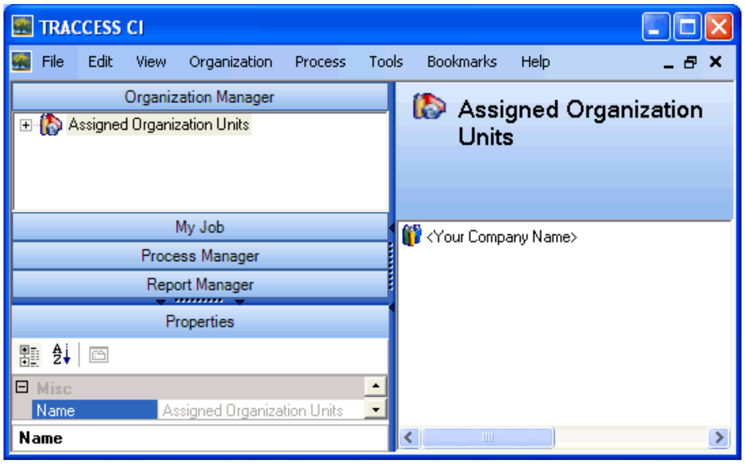


Employee with Multiple Roles – Role Summary

Exercise

Login to TRACCESS CI as an employee with multiple roles, to view the areas of TRACCESS in which the Employee has access.

- Employee ID: **ecampbell**
- Password: (no password required)



Employee with Multiple Roles' view of TRACCESS CI

- In the Organization Manager, Eugene has access to:
  - **<Your Company Name>** Organization Unit as an **Operational Administrator**
  - **Canada / Field Operations** Organization Unit as a **Supervisor**
- In My Job, Eugene has access to:
  - **Head Office Company Policies** from the **Head Office** Organization Unit (learning cascades down)
  - **Sales Processes** and **Marketing Processes** from the **Sales and Marketing** Organization Unit
- In the Process Manager, Eugene has access to:
  - **Sales Processes** as a **Subject Matter Expert**
- In the Report Manager, Eugene has access to:
  - All of the Learners in the **<Your Company Name>** and **Sales and Marketing** Organization Units
  - All of the Processes assigned to the above Organization Units

Contact TTG

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