

What's New in TRACCESS CI (8.2)?







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## What's New in TRACCESS CI (8.2)

At TTG Systems, we are constantly changing and updating our software to meet the needs of our clients. The main features of TRACCESS CI (8.2), as described below, were incorporated to do just that.

## **Fixed Date Durations**

In TRACCESS 7x, a Task could contain a single duration. This was measured in days. If the Task contained both Knowledge and Capability components, the duration always applied to both components. In TRACCESS CI, a Task could contain no durations, a Knowledge duration, a Capability duration or both - each with their own settings, measured in days. In TRACCESS CI (8.2), a Task duration can be set as a Fixed Date. This means that rather than someone's Task component elapsing based on the date that it was last completed, a Task component can be set to elapse on a particular date.

#### How Durations Work

The requirements for qualification on a Task differ on a Task-by-Task basis. For some Tasks, once you have completed the Task the first time, you will never have to review the information again. For other Tasks, it may be more important to review information on a regular basis - to ensure that the proper procedure is both known and is being followed.

A graphic illustration of a Task as it changes from incomplete to complete is as follows:



(For this change to occur, the Learner answers Knowledge Assessment questions or the Supervisor answers Capability Assessment questions on behalf of the Learner)

However, if you have a Task that requires review from time to time, you can introduce the concept of duration. TRACCESS CI (8.0) introduced a new property for a Task - that either component (Knowledge and/ or Capability) could have a duration, and that these could be different values. The possible resulting icons are:



In TRACCESS CI (8.2), not only can you set separate durations for the Knowledge and Capability components which are measured in days, but you can also set a fixed date duration on a Task. Although the resulting icons appear the same, their function is slightly different. Both types of duration are set using the Component Duration Settings dialog (that can be accessed in the Properties section, when a Task is selected in the Process Manager tree).

Duration Setting	×
None	
C Number of Days	
Every 1 🚽 Days	
C Fixed Date	
	Add Absolute Date
	Add Reoccuring Date
	Delete
	Edit
Allow re-qualification within	days of expiry.
j	
ок	Cancel Help

For example:

Task: Comply with CPR. CPR must be recertified every 3 years. This can be accomplished in a few ways:



- Using the number of days duration: Convert 3 years into 1095 days
- Using a fixed date: Enter January 1, 2004, January 1, 2007, January 1, 2010, etc.

#### Number of Days Duration Example

When an Employee completes the Task components for Comply with CPR, the program will begin to count down to the date when the Task will be required to be recertified. The following variables were used for this situation:

- Knowledge and Capability completed: March 1, 2004
- Duration: 1095 Days
- Knowledge and Capability elapse date: March 1, 2007
- Warning Period for About to Elapse (which is located in the Tools/ System Options): 30 days



#### **Fixed Date Duration Example**

Regardless of when an Employee completes the Task components for Comply with CPR, the Task is set to expire on a set date. The following variables were used for this situation:

- Knowledge and Capability completed: March 1, 2004
- Fixed Date Duration: January 1, 2004; January 1, 2007; January 1, 2010

At this point, two different options can be set. The SME may wish for the Task components to elapse on this date, and not allow requalification to occur before (likely because new information is to be implemented on this date). Conversely, the SME may wish for the Employee to be able to complete the Task components in a short time period before they elapse - resulting in qualification for the following period. If you wish for the first case to occur, you must set the Allow Re-qualification within \_\_\_\_\_ days of expiry to 0. If you wish for the second case to occur, you must set the number of days in this dialog.

Please note: the warning period for a Task that has a fixed date duration is set in the Duration Setting dialog, and has nothing to do with the option in the Tools/ System Options dialog.



#### Fixed Date Example (with no allowance for regualification)



#### Information about Number of Days vs Fixed Date durations

- Tasks that are migrated from the 7 series containing durations will be Number of Days durations
  - Tasks that were Practical Only with a duration will become Capability Only with a duration
  - Tasks that were Knowledge Test Only with a duration will become Knowledge Only with a duration
  - Tasks that contained both components with a single duration will become Knowledge and Capability, both with durations (this is due to the fact that the 7 series of TRACCESS only had one duration that applied to both components). If only one component requires a duration in TRACCESS CI, one of the durations will have to be removed. Conversely, if you would like to change the duration setting of one of the components, it will also have to be done manually.
- Warning period for expiry of Tasks is found in different places
  - Number of Days Duration warning this is set in the System Options, and is a global number for all of these types of durations
  - Fixed Date Duration warning this is set in the Duration Settings dialog, and can be a different value for each Task Component (including zero, which acts as a way to ensure that the Task component always expires)
- Scheduling of training may be simplified using the Fixed Date durations when using the Number of Days durations, Employees will have to requalify on their Tasks at different times. However, the Fixed Date Durations force Employees to have to requalify all at the same time. SMEs/ Supervisors/ Managers could attempt to coordinate schedules, in order to stagger the training that is to be received at different times throughout the year.

## **TRACCESS Reports**

Although being able to track information is important, the ability to report on that tracked information is the single biggest need of our clients. The reports introduced in TRACCESS CI (8.2) are the direct result of customer feedback on how our reporting capability could be improved. However, knowing the new reports is good, but having all of the reports together is better. The following is an explanation of all of the reports available in TRACCESS CI. The New reports are marked in the margin.

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Within TRACCESS, several types of reports are available in the Report Manager tree.

The ability to access these reports is dependant on your employee role, and what you are able to report on is dependant on where you are assigned in the system.

Employees with a Learner role have access to the My Job tree, and the following reports:

- Self Qualification Report the Learner is able to generate a report on their own learning progress. It is the same as a Qualification Report, with the exception that it is reporting on a single person.
- Self Qualification (Compact) Report this is the same information as in the Qualification Report (Compact), with the exception that it is reporting on a single person.

*Please note: The main difference between the Qualification and Self Qualification reports is that the Self Qualification Reports are for Learners, and the Qualification Reports are for Supervisors reporting on Learners. The rest of the information is essentially the same.* 

Also, the Self Qualification Reports are the only reports that a System Owner does not have access to. Since they do not have access to a My Job, they do not have any personal learning to report on.

Employees with a Supervisor, Reporter, Operational Administrator or System Owner role have access to the Organization Manager, and the following reports:

- **Organization Report** this report is to obtain profile information on the employees within the system. If a Supervisor or Operational Administrator would like to know the names of all the Learners/ Management in their Organization Units, this would be the report to generate.
- Qualification Report otherwise known as the 'anything and everything' status report. This
  report allows you to select the learning, employees, knowledge/capability/both, learning for
  specific dates, learning for specific Tasks statuses, and more.
- Qualification (Compact) Report rather than reporting on Task components, as with the Qualification Report, this report focuses on a rolled-up Task status. As a result, the exact same parameters run in the Qualification and Qualification (Compact) reports differed in size by 91 pages to 36 pages respectively, since the individual components are not shown in the Qualification (Compact) Report. The largest change can be seen in the summary sections.
- Requalification Report for those people who are responsible for scheduling training, this is the report for you. This report concentrates on Employee's whose Tasks are either about to elapse or elapsed.
  - Summary Report rather than showing all of the detail of the Qualification Report, this
    report shows the percent completion of an entire process by each employee. Please note:
    Someone who has completed all of their Knowledge Assessments, but who has not been
    signed off on Capability Assessments will appear as having 0% complete on this report.
- Task Completion Report this report shows whether a Task Component is completed and is presented in a compact, grid format. This report will display Complete or Incomplete, but will not display dates.
  - Task Summary Report if you want to report on the completion of a Task, but do not know where that Task appears in the system, select this report. It allows you to select the Task (regardless of where it is assigned), and then select the Organization Units of Employees to report on. You then have the option to report on those who have completed the Task, or those who haven't.

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Employees with an Operational Administrator, Reporter, or System Owner role have access to the following additional report. (By default, the Reporter role does not have access to this report, but can be given this right within the Role Permission Set Editor).

• Activity Report - allows the Operational Administrator to report on system usage. Generally, the activities reported on here are when the database is read, or an action is initiated - but not when a database object is modified. For example, successful logins to the system are recorded here - renaming a Task is recorded in the Data Change report.

Employees with an Operational Administrator or System Owner role have access to the following additional reports. (By default, the Operational Administrator role does not have access to these reports, but can be given this right within the Role Permission Set Editor).

- Data Change History Report modifications to the main TRACCESS objects are reported here. These objects include: Organization Units, Employees, Process Sets, Processes, Sub Processes, Tasks and Tasks with Levels.
- Export Report this report is reserved for specific functionality. Its purpose is to aid in transferring summarized learning from TRACCESS to an Enterprise Resource Planning (ERP) Software program.

Each report type has two main steps:

- 1. Create a report template this sets the report criteria or options. A template will appear below the report type in the tree. (Once the template has been created, you also have the option to edit the selections made).
- 2. Generate the report runs the report template, and creates a report instance in the Generated Reports box. This step can be completed immediately after the template is created, or at any time in the future.

#### **General Information on Generated Reports**

As indicated above, for each report you must first create a report template. Once this has been completed, you can generate the report results. This is done by accessing the Generate Report dialog.

#### Generate Report dialog

Title	All Activity
Subtitle	Jan 1, 2007 to present
Description	Jan 1, 2007 to present
Layout	8 1/2×11

In most cases (with exception to the Export Report), the Generate Report dialog contains the same fields:

• **Title** - Before generating a report, you must provide a name for the report. The Title field is populated with the name of the Report Template. The Report Template name and the Generated Report name can be the same - or you can choose to enter a different name.

Please note: Indicating the Report Type in your Generated Report Title is unnecessary. All Generated Reports will be listed under their corresponding Report Type in the Report Manager and the My Reports dialog. Also, you cannot leave the Title field blank. The program will not allow you to generate the report without a Title.

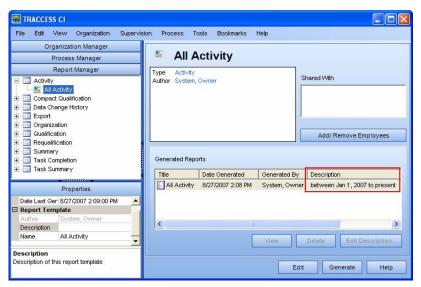
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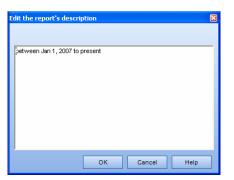
• Sub Title - text in this field will appear in the Header of the generated report, below the Report Type - Report Title line. Other than this location, this information will not be seen in the context view of the Report Manager (see Description). This field can be left blank if you wish. Below is an example of what would be seen in an Activity Report, using the information provided in the Generate Report graphic above.

<b>TTG</b> Systems	Activity Report - All Activity between Jan 1, 2007 to present	TRACCESS CI
	between Jan 1, 2007 to present	- HERBERT AND A STATE OF A STATE

• **Description** - text in this field will appear in the context view of the report manager, when the report template is selected in the tree view.



Contrary to the Subtitle, the Description can be changed after the report has been generated. To do so, right-click on the generated report in the context view, and select Edit.



• Layout - What is set for the currently-logged in Employee will determine which paper type layout will default as shown first. For example, anyone who has "Letter" as their preferred paper type will get the "8 1/2x11" formatted reports. Anyone who has "A4" as their preferred paper type will get the "A4" formatted reports. The preferred paper type setting can be viewed in an Employee's Properties. The default setting is Letter, however if you reside in an area that uses A4 paper, you can change the default (Tools/ Object Definitions/ Employee/ Preferred Paper Type) so that you will not need to reset this option for each Employee that is entered into the system.

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*Please note: Changing the default setting will affect each new employee that is entered into the system. All existing employees' properties will have to be changed manually* 

#### **Generated Report Custom Graphic**

By default, the graphic that appears in the top left corner of all reports is a TTG Systems graphic.



However, using the Modify Image Lists function (**Tools/ Language/ Modify Image Lists/ General Images** tab), this image can be changed to an image that better suits your company (i.e., a company logo). For example:



Since the image must be 191x41 pixels in size, and the background of the header is black, if your logo does not fit these dimensions, simply add black to make up the size (as shown above).

#### **Generated Report Footer**

7/10/2007 11:52:23 GMT -06:00	C - Complete	A - About to Elapse I - Incomplete	E - Elapsed R - Revised N/A - Not Applicable	Generated By System, Owner
M/d/yyyy	Process	Employee	Organization	Page 1 of 3

The report footers are made up of 3 sections of information:

- **Date/ Time** the bottom line indicates the format of the date that appears above it.
- Legend this is made up of 0, 1, or 2 lines, depending on the report
  - Report Status Letters
  - Colors indicating summary type
- Generated By/ Pages
  - Lists the name of the employee who generated the report and is displayed as Last Name, First Name
  - Displays Page x of x

#### Activity Report

The Activity Report allows the Operational Administrator or System Owner to report on system usage. Generally, the activities reported include when the database is read, or an action is initiated - but not when a database object is modified. For example, successful logins to the system are recorded here - renaming a Task is recorded in the Data Change report.

A generated Activity Report appears as follows:

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stems		<b>ty Report - All Activity</b> n Jan 1, 2007 to present			TRACCESS CI
Activity				Host	Details
Session Logout	Lippiatt-Long, Mike	mllong		192.168.100.110	SessionTime 00:00:41
Successful Login	Lippiatt-Long, Mike	milong		192.168.100.110	00:00:41
Session Logout	Lippiatt-Long, Mike	mllong		192.168.100.110	SessionTime
Successful Login	Lippiatt-Long, Mike	mllong		192.168.100.110	00:00:15
Export Summarized Learning Records	System, Owner	systemowner			LogFilePath 8_sites\Documentation\Engine \k MPEX_\systemovner_1\ExportLo
Successful Login	System, Owner	systemowner		192.168.100.101	gs\OHS Export .log
Session Logout	System, Owner	systemowner		192.168.100.110	SessionTime 00:02:41
Successful Login	System, Owner	systemowner		192.168.100.110	00.02.41
Session Logout	System, Owner	systemowner			SessionTime 01:03:45
Successful Logh	System, Owner	systemowner		192.168.100.110	01:03:45
Session Logout	System, Owner	systemowner		192.168.100.110	SessionTime 00:02:14
Successful Login	System, Owner	systemowner		192.168.100.110	00.02.14
Session Logout	System, Owner	systemowner		192.168.100.110	SessionTime 00:00:57
Successful Login	System, Owner	systemowner		192.168.100.110	
MT -06:00					Generated By System, Owner Page 5 of 5
	Activity Session Logout Successful Login Successful Login Export Summarized Learning Records Successful Login Session Logout Successful Login Session Logout Successful Login Session Logout Successful Login	Activity         Employee Name           Session Logout         Lipplatt-Long, Mike           Successful Login         Lipplatt-Long, Mike           Successful Login         Lipplatt-Long, Mike           Successful Login         Lipplatt-Long, Mike           Export Summarized Learning Records         System, Owner           Successful Login         System, Owner	Activity         Employee Name         Employee D           Session Logout         Lippiatt-Long, Mike         milong           Successful Login         Lippiatt-Long, Mike         milong           Export Summarized         System, Owner         systemowner           Successful Login         System, Owner         systemowner	Activity         Employee Name         Employee D         Identity           Session Logout         Lippiatt-Long, Mike         milong	ActivityEmployee NameEmployee DIdentityHostSession LogoutLippiett-Long, Milemilong192:168.100.110Successful LoginLippiett-Long, Milemilong192:168.100.110Successful LoginLippiett-Long, Milemilong192:168.100.110Successful LoginLippiett-Long, Milemilong192:168.100.110Export SummarizedSystem, Ownersystemowner192:168.100.110Export SummarizedSystem, Ownersystemowner192:168.100.110Successful LoginSystem, Ownersystemowner192:168.100.110Successful LoginSyst

The following columns are displayed in the Activity Report:

- Date/ Time
- Activity this can include any of the Activities selected in the Activity Report
- Employee Name displays Last Name, First Name
- Employee ID
- Identity is the domain identity that the webserver received as authentication. The TRACCESS application forces the use of the ID of the currently-logged in Employee. This field is particularly useful if an Employee is logging in from somewhere other than within the network. Otherwise, if your Employees are always logging into TRACCESS from within your network, this field will always be blank.
- **Host** the Internet Protocol (IP) address of the system running the client that generated the activity. This IP address is the TCP IP address that the webserver sees when it received the request. This may be the client machine, a Router, a Proxy, or a spoof.

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A page such as the following is designed to return what this webserver sees as your IP address.

#### http://whatismyipaddress.com/

**Details** - depending on the Activity, this field provides more specific information.

*For example: If the Activity is Open Resource, this field displays the Resource Name. If the Activity is Session Logout, this field displays the amount of time that you were logged in.* 

## Data Change History Report

The Data Change History Report displays modifications to the main TRACCESS objects. These objects include: Organization Units, Employees, Process Sets, Processes, Sub Processes, Tasks and Tasks with Levels. A detailed list of the information that is captured for each object is provided on the Interpret Data Change History page.

Examples of uses of this report are:

- For Subject Matter Experts- to provide a "timeline" for the development of an object specifically Tasks. This report will show who initially created a Task, what the original name
  was, when Knowledge and/ or Capability components were added, etc. When several SMEs
  are using the database, some Tasks may be repurposed by someone other than the creator of
  the Task, and you may wish to track these changes in order to establish a "protocol or
  procedure" for creating your learning.
- For Supervisors to show when particular changes were made to Employee profile information, and by whom.
- For Operational Administrators to view the changes made for both Organization Units and Employees.

Since this report does not filter the objects that a particular SME, Supervisor or Operational Administrator has access to, this is reserved as a System Owner Report. If any of the above Roles require information from this report, they can make a request of the System Owner to generate the report. It is the System Owner's responsibility to "weed out" the information that is not required by that individual.

Please note: This report is new to TRACCESS CI (8.2). Because of this, any object that existed in the database prior to using this version will not have its Data Change History information tracked. Attempting to generate report results as soon as you upgrade to TRACCESS CI (8.2) will result in a report that contains no data.

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	G Systems				pry Report - Task Changes TRACCESS CI
	1000 400 W100	7520 40 7555	2000 20 9/22 202		nized by Object
Date/Time Task	Employee Name	Employee D	Employee Number	Action	Description
	with Confined Space	Awareness			
8/31/2007 10:21:48AM	System, Owner	systemowner	1	Update	The property value 'Has Knowledge Component' has changed from 'No' to 'Yes'.
8/31/2007 10:21:04AM	System, Owner	systemowner	1	Update	The property value 'Has Capability Component' has changed from 'No'to 'Yes'.
8/31/2007 10:18:14AM	System, Owner	systemowner	1	Update	The property value 'Knowledge Duration Setting' has changed from 'None' to 'Duration: 1095 days'.
8/31/2007 10:17:59AM	System, Owner	systemowner	1	Update	The property value 'Capability Duration Setting' has changed from 'None' to 'Duration: 1095 days'.
8/31/2007 10:16:55AM	System, Owner	systemowner	1	Update	The property value 'Name' has changed from 'Task 340' to'Comply with Confined Space Awareness2' for language English.
8/31/2007 10:16:34AM	System, Owner	systemowner	1	Update	The property value 'Name' has changed from NULL to 'Task 340' for language English.
8/31/2007 10:16:33AM	System, Owner	systemowner	1	Update	The property value 'Capability Duration Setting' has changed from NULL to 'None'.
8/31/2007 10:16:33AM	System, Owner	systemowner	1	Update	The property value 'Knowledge Duration Setting' has changed from NULL to 'None'.
8/31/2007 10:16:33AM	System, Owner	systemowner	1	Update	The property value 'Task Notes' has changed.
8/31/2007 10:16:33AM	System, Owner	systemowner	1	Update	The property value 'Has Capability Component' has changed from NULL to 'No'.
8/31/2007 10:16:33AM	System, Owner	systemowner	1	Update	The property value 'Has Knowledge Component' has changed from NULL to 'No'.
8/31/2007	System, Owner	systemowner	1	Create	The object was created.

In TRACCESS CI (8.2), the types of modifications that are tracked are shown in the tables below.

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Object Creation	1
Property Changes	1
Delete	-
Object Movement	-
Archive	N/A
Purge	N/A
Restore	N/A
UNDO - Delete	1
UNDO – Property Change	-
UNDO – Create	-
UNDO - Move	-
REDO - Delete	-
REDO – Property Change	-
REDO - Create	-
REDO - Move	-

Employee	
Object Creation	<ul><li>✓</li></ul>
Property Changes	<ul><li>✓</li></ul>
Delete	-
Archive	<ul> <li>✓</li> </ul>
Purge	-
Restore	-
Object Movement	N/A
UNDO - Delete	N/A
UNDO - Property Change	-
UNDO - Create	<ul> <li>✓</li> </ul>
UNDO - Move	N/A
REDO - Delete	N/A
REDO - Property Change	$\checkmark$
REDO - Create	$\checkmark$
REDO - Move	N/A

Process Set	]
Object Creation	× -
Property Changes	<b>1</b>
Delete	<b>_</b>
Object Movement	<b>1</b>
Archive	N/A
Purge	N/A
Restore	N/A
UNDO - Delete	<b>_</b>
UNDO – Property Change	<b>1</b>
UNDO – Create	<b>_</b>
UNDO - Move	<b>1</b>
REDO - Delete	<b>1</b>
REDO – Property Change	<b>1</b>
REDO – Create	<b>_</b>
REDO - Move	<b>1</b>

	1
Process	
Object Creation	<b>1</b>
Property Changes	<b>1</b>
Delete	<b>~</b>
Object Movement	<b>1</b>
Archive	N/A
Purge	N/A
Restore	N/A
UNDO - Delete	<b>1</b>
UNDO - Property Change	<b>~</b>
UNDO - Create	<ul> <li>Image: A second s</li></ul>
UNDO - Move	<ul> <li>Image: A second s</li></ul>
REDO - Delete	<b>√</b>
REDO - Property Change	<b>V</b>
REDO - Create	×
REDO - Move	<b>1</b>

Sub Process	
Object Creation	<b>1</b>
Property Changes	<b>~</b>
Delete	<b>√</b>
Object Movement	<b>1</b>
Archive	N/A
Purge	N/A
Restore	N/A
UNDO - Delete	<b>~</b>
UNDO - Property Change	<b>1</b>
UNDO - Create	<b>_</b>
UNDO - Move	<b>√</b>
REDO - Delete	<b>1</b>
REDO - Property Change	<b>_</b>
REDO - Create	-
REDO - Move	<b>_</b>

Task/ Competence Level	
Object Creation	-
Property Changes	-
Delete	-
Archive	-
Purge	-
Restore	-
Object Movement	N/A
UNDO - Delete	N/A
UNDO – Property Change	-
UNDO - Create	-
UNDO - Move	N/A
REDO - Delete	N/A
REDO – Property Change	-
REDO - Create	-
REDO - Move	N/A

	1
Task with Levels	
Object Creation	<ul> <li>Image: A second s</li></ul>
Property Changes	<
Delete	<b>~</b>
Archive	<
Purge	<
Restore	<b>~</b>
Object Movement	N/A
UNDO - Delete	N/A
UNDO - Property Change	<b>~</b>
UNDO - Create	<b>~</b>
UNDO - Move	N/A
REDO - Delete	N/A
REDO - Property Change	<ul> <li>Image: A second s</li></ul>
REDO - Create	<ul> <li>Image: A second s</li></ul>
REDO - Move	N/A

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## **Export Report**

The Export Report is to aid in transferring summarized learning from TRACCESS to an Enterprise Resource Planning (ERP) Software program.

Learning records within TRACCESS are held at a Task level that is not required in an ERP. That information can be summarized and exported for import into the ERP system.

Records are summarized based on "Export Categories". All of the Tasks within the Export Category must be complete to display the Category as complete. If even a single Task is incomplete, the Category will be incomplete.

The export is a flat text file with the relevant information that has changed since the last export.

This text file will act as the log for the export.

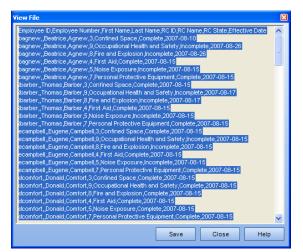
In order to export summarized learning records, a few steps must be carried out:

Create Task Export Categories

To export summarized Learning Records, Tasks must be organized into categories. Categories can be as large or as small as desired. For example, you may wish to sort all Sub Processes into Categories, or you may wish to sort all Processes into Categories. Keep in mind that the Export returns only two states: Complete and Incomplete.

• Create an Export Report

Once Task Export Categories have been created, the export report simply involves selecting which employees and export categories to report on.



Once the report has been generated, you can save the report in the form of a text (\*.txt file). This text file can subsequently be imported into your ERP or HRIS application.

When an export report is generated, the time of this action is recorded. You may notice in the above graphic, each line of the report ends with a date (the date that the employee became complete or incomplete on a particular export category). When a future export report is generated, there are a few things that can dictate from when the information is generated.

• In the Options page of the template wizard, there is a "Only include records that have changed since the last export". This option can be disabled to show all records.





F		 Output File Name	مردر ورکند و اور ایک	
	Options			
2		C Overwrite existing file	Increment ex	isting file name
1		Only include records that have changed	since last export.	

In the Properties section when the Export Report Template is selected in the tree, there is a property called Date Last Generated. Clicking on the date in this field brings up a Calendar dialog. If you would like to clear the date, the report will be generated the following time using all of the status information for Export Categories.

TRACCESS CI					
File Edit View Or	ganization Supervision Pr	rocess Tools	Bookmarks Help		
Organiz	ation Manager				
Proc	ess Manager	- i o	HS Export		
Rep	ort Manager	Type Exp	- port		
Activity     Compact Qualifica     Compact Qualifica     Data Change Histo     Compact Qualification     Comparization     Qualification     Gouganization     Gualification     Summary     Task Completion		Author Ew	anuk, Michelle Reports	I L	d/ Remove Employees
		Title	Date Generated	Generated By	Description
		OHS E	xport 8/27/2007 2:37 PM	System, Owner	to be imported into ERP
	roperties				
Date Last Generated	8/27/2007 2:37:53 PM				
Report Template		<			>
Author	Ewanuk, Michelle				
Description			Vie	w Delete	Edit Description
Name	OHS Export	<b>-</b>			
Description Description of this report t	emplate			Edit	Generate Help

If either of these remain unchanged (the above option "Only include records that have changed since the last export" remains enabled, and the Date Last Generated is not cleared), the following Export report will only show information that has changed since the last export.

## **Organization Report**

The Organization Report could also be thought of as a Roster Report or a Personnel Report. This is the only report that does not display Employee Task Statuses, but displays the personal properties of an Employee.

Examples of uses of this report are:

- For Supervisors to provide a list of the members of his Organization Unit, and their information
- For TRACCESS Operational Administrators
  - to ensure that all required information has been entered for their personnel
  - to check that the information that is entered for employees is valid for example, since the email functionality is important for TRACCESS CI to function properly, the Administrator may wish to check if each employee has a valid email address. Also, if a company has experienced a merger or take-over by another company, the email addresses of some may have changed, and others have yet to change. This report will display the current information without having to look at each person's properties.

If your purpose in creating an Organization Report is to display all Employees within a particular Organization Unit, you will not need to create a filter. However, if you wish to show only employees from particular Organization Units that fit particular criteria, you will need to create a report filter.

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For example, in the email example listed above, filters could be added to the Organization Report template. Without adding a filter, you would select the Org Unit to report on, as well as enabling the email property. This would list all employees of the Organization Unit. However, you could add any of the following filters to shorten your list of results:

- Employees whose Email Address Equals <blank>.
- Employees whose Email Address contains <old company name>.

Report - TRACCESS CI			
🗿 🍊   🚼   н. ч. э. э.	1 /84 🕅 🔐 🕶		BusinessObjects
Main Report			
II TTO Suchase		Organization Report - UE - All	and the
TTG System	S		TRACCESS CI
	2200	All Employees - All Properties	
Summary			
Total Learners	137		
Total Management	4		
Total Employees	137		
		Organized by Organization Unit	-
Universal Enterprises			
Agnew, Beatrice			
Roles:	Learner		
Account Created On	14/11/2006 11:36 AM		
Account Status	Active		
Can Change Password	Yes		
Email Address	bagnew@universal_enterprises.com		
Employee ID	bagnew		
Employee Number			
First Name	Beatrice		
Invalid Login Attempts Last Name	0		
[10] M.	Agnew		
Last Successful Login	0		
Maximum Reports Override Must Change Password	No		
Password Changed Date	NO		
Password Duration	0		
Preferred Paper Type	Letter		
Primary Process	Undefined		
Barber, Thomas	- Shachilda		
Roles:	Learner		
Account Created On	14/11/2006 11:37 AM		
Account Status	Active		
Can Change Password	Yes		
Email Address	tbarber@universal_enterprises.com		
Employee ID	tbarber		
8/27/2007 1:00:37 PM GMT -06:00			Generated By System, Owner
M/d/yyyy h:mm:sstt		Organization	Page 1 of 84
urrent Dage No. 1	Trusto.	e No.: 84	Zoom Factor: 100%
iurrent Page No.: 1	Total Pag	e NU.: 04	200m Factor: 100%
			Close Help

The results of the Organization Report will change depending on the fields that were selected, and filters created, in the Template Wizard.

## **Qualification Report**

The Qualification Report, in simple terms could be known as the "anything and everything report". All qualification statuses for all Employees on all process information can be reported on.



II TTG Sys	ems		fication Repo ed by Organiza						Carl In	RACCESS
				Summary						
	<u>Knowledge</u>	<u>% of Total</u> Assignments	<u>Capability</u>	<u>% of Total</u> Assignments				Combined Stat		<u>% of Total</u> ssignments
Complete	142	27.4%	240	46.2%		omplete		178		53.0%
About to Elapse	44	8.5%	28	5.4%		icomplete		158		47.0%
Incomplete	14	2.7%	14	2.7%		otal Assignments	1.11	336		
Elapsed Revised	136 0	26.2% 0.0%	54 0	10.4% 0.0%		otal Unique Employee otal Unique Tasks	న	24 336		
Total Assignments	336	64.7%	336	64.7%		our ornque rasks		330		
			Organize	d by Organizati	on					
				Knowle	dge	Capabil	ity		Task Status	
				Date	Status	Date	Status	Date	Elapse	Status
Comply with Sit Comply with Ad Comply with Ad Comply with Ha Comply with Ha Comply with Ha Comply with Fir Comply with Fir Comply with Fir Universal Enterpy	vanced First Aid R E zardous Storage Requirem cardous Exposure Respon- ises/UE Corporate/USEU and Explosion Awareness e and Explosion Awareness e and Explosion Emergency ises/UE Corporate/USEU	Chemical, Biological, a ents se Fire and Explosion s 7 Response		10/25/2004 10/25/2004 8/26/2004 8/26/2004	C C C C E E C	10/12/2004 10/12/2004 10/12/2004 11/9/2004 9/1/2004 9/1/2004	C C C C C A A	10/12/2004 10/12/2004 10/12/2004 11/9/2004 11/9/2004 9/1/2004 9/1/2004	10/12/2007 10/12/2007 10/12/2007 10/25/2007  	Complete Complete Complete Complete Incomplete Incomplete
	neral PPE Requirements E Maintenance and Repair			11/9/2004 11/9/2004	C C	11/9/2004 11/9/2004	c c	11/9/2004 11/9/2004	11/9/2007 11/9/2007	Complete Complete
	ises\UE Corporate\HSE\	Noise Exposure								
	ise Exposure Control idiometric Testing Requirem	-		8/11/2004 8/11/2004	E	8/11/2004 8/11/2004	E	8/11/2004 8/11/2004		Incomplete Incomplete

#### Knowledge/ Capability/ Task Status

Know	ledge	Capabi	lity		Task Status			
Date	Status	Date	Status	Date	Elapse	Status		
7/6/2007	с			7/02007		la secondada		
7/6/2007	c		····	7/6/2007 7/6/2007		Incomplete Incomplete		
11012001				110/2007		momplete		
		7/6/2007	с	7/6/2007		Incomplete		
	1	7/6/2007	с	7/6/2007		Incomplete		
7/26/2007	с	7/26/2007	с	7/26/2007		Complete		
7/6/2007	с		I	7/6/2007		Incomplete		
7/26/2007	R	7/26/2007	с	7/26/2007		Incomplete		
	1	7/6/2007	с	7/6/2007		Incomplete		

Both components (Knowledge and Capability) contain two columns:

• **Date** - The date formats are all represented the same way on a report. This format is indicated in the bottom left section of the report footer.



• **Status** - The status is represented by a letter, whose legend is found in the center section of the report footer.

If a particular component is not chosen to be reported on (in the Options page), the date will appear as --- and the status will be listed as N/A.

The Task Status contains three columns:

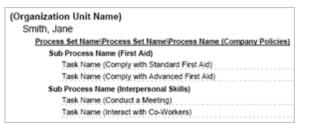
- Date same as above
- **Elapse** is the date that the first component (Knowledge or Capability) will elapse.
- Status is a roll-up of both components, and can be either Complete or Incomplete.

For example:

```
Knowledge = Complete, Capability = Incomplete, Task Status = Incomplete
Knowledge = Complete, Capability = Does not exist, Task Status = Complete
Knowledge = About to elapse, Capability = Complete, Task Status = Complete
Knowledge = Revised, Capability = Complete, Task Status = Incomplete
Knowledge = Revised, Capability = Incomplete, Task Status = Incomplete
```

Depending on how the report is organized, the detail lines will be listed in different orders.

Organization Unit



Employee



Process

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# **TTG** Systems

The Competency Intelligence Leader



Process Set Name\Process Set Name\Process Name (Company Policies)
Sub Process Name (First Aid)
Task Name (Comply with Standard First Aid)
Smith, Jane
Smith, John
Task Name (Comply with Advanced First Aid)
Smith, Jane
Smith, John
Sub Process Name (Interpersonal Skills)
Task Name (Conduct a Meeting)
Smith, Jane
Smith, John
Task Name (Interact with Co-Workers)
Smith, Jane
Smith, John

Task

Task Name (Comply with Advanced First Aid)
Smith, Jane
Smith, John
Task Name (Comply with Standard First Aid)
Smith, Jane
Smith, John
Task Name (Conduct a Meeting)
Smith, Jane
Smith, John
Task Name (Interact with Co-Workers)
Smith, Jane
Smith, John

#### **Objects appearing in Detail Lines**

Organization Unit Structure and Name

The entire Organization structure above the selected Organization Unit is listed, separated by forward slashes (/).

If you are a reporter who only has access to an Organization Unit named Operators, but this Organization Unit is nested within other Organization Units, the first line will not show Operators, it will show Organization Unit/ Organization Unit/ Operators. This was designed to distinguish between Organization Units with the same name. There may be two groups called Operators and therefore the two reports on these separate groups may appear as follows:

< Your Company Name>/Operations/Shift A/Operators < Your Company Name>/Operations/Shift B/Operators

Employee Name

The name is listed as Last Name, First Name

Process Structure and Name

The entire Process structure above the selected Process is listed, separated by forward slashes (/). This includes all of the Process Set Names, ending with the Process Name.

- Sub Process Name
- Task Name

## **Qualification (Compact) Report**

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The Qualification (Compact) Report concentrates on a Task as a whole, rather than its components. With less information to be presented (i.e., the statuses of the components and the elapse date for the Task), the report information was able to fit in a portrait layout as opposed to a landscape layout, allowing more lines to a page, resulting in less pages.

Complete         About Dapse         Incomplete         Expend         Revised         Ordal         Sol Status           Incomplete         Sin Status         Complete Sin Status         Complete Sints           Incomplete         Sints         Complete           Sints         Complete           Sints         Complete           Sints         Complete           Sints         Complete           Sints         Complete         Complete           One of the Sints         Complete         Sints         Complete           Complete         Sints         Sints         Complete	🖿 TTG Sys	tems		i <b>tion Repor</b> ed bγ Organ	t - UE - HSE ization Unit		TRAC	CCESS CI
178         39         158         144         0         336         63.0 %           Organization           Nonvisida         Carability         Task Status           Status         Carability         Task Status           Status         Carability         Task Status           Organization           Inversion Status         Carability         Task Status           Comptivity Status         Comptivity         A         Comptivity           Comptivity Status         Comptivity         A         Comptivity         A         Comptivity           Comptivity Status         0/10/2004         10/8/2004         A         Comptivity           Comptivity Status         0/10/2004         10/12/2004         C         Comptivity         C <td< th=""><th>Summary</th><th>- 1</th><th></th><th></th><th>-</th><th></th><th></th><th></th></td<>	Summary	- 1			-			
Hnowledze         Carability Name         Task Status         Complet Complet           niversal Enterprise         Enterprise         Complet         Complet           Universal Enterprise         Universal Enterprise         Complet         Complet           Comply with Confind Space Aurones         9/10/2004         10/8/2004         A         Complet           Comply with Confind Space Resu         9/10/2004         10/8/2004         A         Complet           Comply with Confind Space Resu         9/10/2004         10/8/2004         A         Complet           Comply with Confind Space Resu         9/10/2004         10/8/2004         A         Complet           Comply with Admandel Resu         10/12/2004         10/12/2004         C         Complet           Comply with Admandel Resu         10/12/2004         10/12/2004         C         Complet           Comply with Admandel Result         10/12/2004         10/12/2004         C         Complet           Comply with Admandel Result         10/12/2004         10/12/2004         C         Complet           Comply with Admandel Result         Enterprise         Complet         Incomplet         Incomplet           Comply with Admandel Result         Enterprise         Enterprise         Incomplet								
Status         Complet Inversal Enterprises VIE Corporate/VISE Use Comply with Confined Space Aureness:         9/10/2004         10/9/2004         A         Comply with Confined Space Aureness:         9/10/2004         10/9/2004         Comply with Advanced First Ad         Comply with Advance			Organ	nized by Orga	nization			
gnew, Beatrice           Inversal Entreprise/UE Corportabl/SE Diversal En					Knowledge	<u>Capability</u>		<u>k Status</u> Completi
Inversel Enterprises/UE Corporate/HSE         0/10/2004         10/8/2004         A         Comply with Confined Space Aueroses         9/10/2004         10/8/2004         A         Comply with Confined Space Aueroses         9/10/2004         10/8/2004         A         Comply with Confined Space Reve         0/10/2004         10/8/2004         A         Comply with Advanced Reve         Reve         Comply with Advanced Reve         Comply with Adv	Iniversal Enterpr	ses						
Universal Enterprises/UE Corporate/HSEChemical, Bological, and Hacedoad Subatives. Comply with Confined Space Bitry 80/10/2004 108/2004 A Compl Comply with Advanced Fist Ad Compl Comply with Advanced Fist Ad 10/12/2004 108/2004 C Compl Comply with Advanced Fist Ad 10/12/2004 00/12/2004 C Compl Universal Enterprises VUE Corporate/HSENChemical, Biological, and Hacedoad Subatives Comply with Acadous Spopus Reparts 80/26/2004 9/1/2004 E Incomp Comply with Acadous Paperson Papersone 82/26/2004 9/1/2004 E Incomp Comply with Acadous Papersone 10/26/2004 11/9/2004 C Compl Universal Enterprises VUE Corporate/HSENE Mosteve Equipment 11/9/2004 11/9/2004 C Compl Universal Enterprises VUE Corporate/HSENE Mosteve Equipment 11/9/2004 11/9/2004 C Compl Universal Enterprises VUE Corporate/HSENE Mosteve Explored 8/11/2004 8/11/2004 E Incomp Comply with Advanced Fist Ad Enterprises VUE Corporate/HSE VECOP 11/9/2004 C Compl Comply with Advanced Fist Ad 10/16/2004 0/14/2004 E Incomp Comply with Advanced Fist Ad Enterprises VUE Corporate/HSE VECOP 11/9/2004 C Compl Comply with Advanced Fist Ad 10/16/2004 0/14/2004 A Compl Comply with Advanced Fist Ad 10/16/2004 0/10/2004 A Compl Comply with Advanced Fist Ad 10/16/2004 0/10/2004 A Compl Comply with Confined Space Resource 9/14/2004 0/10/2004 A Compl Comply with Confined Space Resource 9/14/2004 0/10/2004 C Compl Comply with Confined Space Resource 9/14/2004 0/10/2004 C Compl Comply with Confined Space Resource 9/14/2004 0/10/2004 C C	Agnew, Beatrice							
Comply with Confined Space Auroness         9/10/2004         108/2004         A         Comply with Confined Space Resu         9/10/2004         108/2004         A         Comply with Confined Space Resu         9/10/2004         108/2004         A         Comply with Confined Space Resu         9/10/2004         108/2004         A         Comply with Standard Fise Ad         Comply with Advanced Fise Advances         Comply with Advances <t< td=""><td>Universal Enterprises/U Universal Enterprise</td><td>E Corporate\HSE s\UE Corporate\HS</td><td>SEConfined Space</td><td></td><td></td><td></td><td></td><td></td></t<>	Universal Enterprises/U Universal Enterprise	E Corporate\HSE s\UE Corporate\HS	SEConfined Space					
Comply with Confined Space Reace         9/10/2004         A         Comply with Standard Fise At           Universal Enterprises UE Corporate/HSER Ad         00/12/2004         C         Comply with Standard Fise At           Comply with Advanced Fise At         10/12/2004         00/12/2004         C         Comply with Advanced Fise At           Comply with Advanced Fise At         10/12/2004         10/12/2004         C         Comply with Advanced Fise At           Universal Enterprises VE Corporate/HSER model Explored         10/02/2004         11/0/2004         C         Comply with Advanced Fise At           Universal Enterprises VE Corporate/HSER model Explored         10/02/2004         9/12/2004         E         Incomply with Fise and Explosion Advances         9/16/2004         9/12/2004         E         Incomply with Fise and Explosion Advances         9/16/2004         0/12/2004         E         Incomply with Fise and Explosion Advances         9/16/2004         0/12/2004         E         Incomply with Advanced Fise At         E         Incomply with Advancet At         E         Incomplet         Advancet At         E         Incomplet         E         Incomplet         Advancet At         Total	Comply with Confin	ed Space Awareness						Complet
Universal Enterprises/UE Corporate/HSE/Ent Ad Comply with Advanced First Ad Comply with First and Esplosion Entregrancy Reportse Comply with Advanced First Ad Comply with Advanced First Ad Comply with First and Esplosion Entregrancy Reportse Comply with Neire Advanced Report Comply with Neire Advanced Report Comply with Neire Exposure Advanced Report Comply with Neire Exposure Advanced Report Comply with Neire Exposure Correl Comply with Neire Exposure Advanced Report Comply with Neire Exposure Advanced Report Comply with Advanced Report Comply with Advanced Report Complete Adv								Comple
Comply with Standard File Ad Comply with Advanced File Ad Comply with Advanced File			DEnt (Ed		9/10/2004	10/8/2004	A	Comple
Comply with Advanced Fitz Ad     10/12/2004     10/12/2004     C     Comply with Advanced Fitz Ad       Comply with Advanced Fitz Ad     10/12/2004     10/12/2004     C     Comply with Advanced Fitz	Comply with Standa	nd First Aid	CAUX NO		10/12/2004	10/12/2004	С	Comple
Universal Enterprises/UE Corporate/VESE/Chemical, Biological, and Hazardous Substrates Complywith Hazardous Storage Requerements 10/25/2004 11/9/2004 Complywith Hazardous Exposure Regioner Complywith Fire and Explosion Free and Explosion Complywith Fire and Explosion Avaiances Complywith Fire and Explosion Preterior Regioner Complywith Fire and Explosion Chemical Historican Complywith Fire and Explosion Chemical Historican Complywith Fire and Explosion Chemical Historican Complywith Remain PEE Requirements Complywith Relies Exposure Control Complywith Relies Exposure Reported Complywith Relies Exposure Reported Complywith Relies Exposure Reported Complywith Relies Exposure Reported Complywith Audiometric Testing Requirements 4 4 0 14 71.415 Total Complete Relies VIE Corporate/HSE Complete Relies VIE Component Report Complete Relies VIE Component Report Complete Relies VIE Component Relies VIE Complete Relies VIE Component Relies VIE Component Relies VIE Complete Relies VIE Complete Relies 1 4 4 0 14 71.415 Total Complete Relies VIE Component Relies VIE Complete Relies VIE Component/VIE Complete Relies VIE Complete Relies VIE Complete Relies VIE Component/VIE Complete Relies VIE Component/VIE Complete Relies VIE Component/VIE Complete Relies VIE Complete Relies	Comply with Advan				10/12/2004			Comple
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rocess Summary - Universal Enterprises UE Corporate/HSE           Complete         About Dapse         Incomplete         Bapsed         Total         Complete MM           10         3         4         4         0         14         71.4%           mployce Summary - Agnew, Beatrice         Complete         14         71.4%         71.4%           Complete         About to Bapse         Incomplete         Bapsed         Total         Complete MM           Total         Complete         A         0         14         71.4%           arbor, Thomas         4         4         0         14         71.4%           universal Enterprises/UE Corporate/HSE         Comply Universal Enterprises/UE Corpor			rements					Incomple
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Comply with CPR         10/16/2004         10/12/2004         C         Comply           Universal Enterprises/UE Corporate/HSENChemical, Biological, and Hazardous Substances         10/26/2004         10/25/2004         C         Comply           Comply with Hazardous Storage Requirements         10/29/2004         10/25/2004         C         Comply           Universal Enterprises/UE Corporate/HSERFire and Explosion         C         Comply with Fire and Explosion Autainees         6/17/2004         8/13/2004         E         Incomp           Universal Enterprises/UE Corporate/HSERFire and Explosion         0/17/2004         8/13/2004         E         Incomp           Universal Enterprises/UE Corporate/HSERFires/and Explosion         0/17/2004         8/13/2004         E         Incomp           Universal Enterprises/UE Corporate/HSERFires/and Protective Explorement         0/17/2004         8/13/2004         E         Incomp           Universal Enterprises/UE Corporate/HSERFires/and Protective Explorement         7/2007         8/13/2004         E         Incomp	Comply with Standa	rd First Aid						Comple
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Complywith Fire and Explosion Awareness         8/17/2004         8/13/2004         E         Incomp Complywith Fire and Explosion Emergency Response         8/17/2004         8/13/2004         E         Incomp           Universal Enterprises UPE Corporate/W1SE/Personal Protective Equipment         1/17/2004         8/13/2004         E         Incomp           V01versal Enterprises UPE Corporate/W1SE/Personal Protective Equipment         1/17/2004         8/13/2004         E         Incomp           V1/1versal Enterprises UPE Corporate/W1SE/Personal Protective Equipment         1/17/2004         8/13/2004         E         Incomp					10/29/2004	10/25/2004	C	Comple
Complywith Fire and Explosion: Energency Reporce 8/17/2004 E Incomp Universal Enterprises/UE Corporate/HSEVPersonal Protective Equipment ///200712.07.23 PM GMTGM Complete A-Aboutto Elapse I-Incomplete E-Bapsed R-Revised N/A-Not Applicable Page 1 or					9/17/2004	0/12/2004	F	Incomet
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	277200712:07:23 PM GMI /d/yyyyyhmm:sstt							
	1977 - 2018 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 -		9494 C 102 (93) (94)	an a second of				

The Qualification Report has long been known to be the most useful, and most widely used, report. However, with all of its summaries, it is also one of the largest reports to generate (in number of pages).

Another difference between the Qualification and Qualification (Compact) Reports is seen in its summaries. Compared to a regular Qualification Report, with each summary section taking up 10 lines of space on a page, the Qualification (Compact) Report summaries have been reduced to 3 lines each. The end result of this compaction is that a report that is normally comprised of 29 pages (Qualification Report) becomes 14 pages (Qualification - Compact Report).



#### **Detail Lines**

	Knowledge	Capability	Tasl	<ul> <li>Status</li> </ul>
			Status	Completio
niversal Enterprises				
gnew, Beatrice				
niversal Enterprises/UE Corporate/HSE Universal Enterprises/UE Corporate/HSE/Confined Space	0402004	1000001		
Comply with Confined Space Awareness	9/10/2004	10/8/2004	Α	Complet
Comply with Confined Space Entry	9/10/2004	10/8/2004	A	Complet
Comply with Confined Space Rescue	9/10/2004	10/8/2004	A	Complet
Universal Enterprises\UE Corporate\HSEFirst Aid				
Comply with Standard First Aid	10/12/2004	10/12/2004	с	Complet
Comply with Advanced First Aid	10/12/2004	10/12/2004	с	Complet
Comply with CPR	10/12/2004	10/12/2004	с	Complet
Universal Enterprises \UE Corporate \HSE\Chemical, Biological, and Ha		44,02004	с	Countral
Comply with Hazardous Storage Requirements	10/25/2004	11/9/2004		Complet
Comply with Hazardous Exposure Response	10/25/2004	11/9/2004	С	Complete
Universal Enterprises\UE Corporate\HSE\Fire and Explosion				
Comply with Fire and Explosion Awareness	8/26/2004	9/1/2004	E	Incomple
Comply with Fire and Explosion Emergency Response	8/26/2004	9/1/2004	E	Incomple

If the Knowledge/ Capability components have been completed, their respective columns will indicate the date of completion. However, what appears in the Task Status columns warrant explanation.

- **Completion** this can be either Complete or Incomplete.
- **Status** this follows an order of precedence
  - I (Incomplete) Either half of the task is incomplete without having elapsed or been revised
  - **E (Elapsed)** At least one half of the task has elapsed and the other half is complete, revised, non-existent or also elapsed
  - **R (Revised)** At least one half of the task is revised and the other half is complete, nonexistent, or also revised
  - A (About to Elapse) At least one half of the task is about to elapse and the rest of the task is complete, non-existent, or also about to elapse
  - C (Complete) The entire task is complete without either half being about to elapse

#### **Totals Summary**

Summary								
Complete	About to Elapse	Incomplete	Elapsed	Revised	Total	Complete (%)		
178	39	158	144	0	336	53.0%		

The summaries for the compact layout include the following data:

- Complete The number of complete tasks
- Incomplete The number of incomplete tasks
- About to Elapse The number of tasks that were given a status of About to Elapse according to the rules of status precedence.
- Elapsed The number of tasks that were given a status of Elapsed according to the rules of status precedence.
- Revised The number of tasks that were given a status of Revised according to the rules of status precedence.
- **Total** The total number of tasks being reported on.
- **Complete (%)** the percentage of complete tasks out of the total number of tasks.



The following screen capture is an example of the same Total Summary that would appear in the Qualification Report when using the same information to generate results.

				Summary			
	Knowledge	<u>% of Total</u> Assignments	<u>Capability</u>	<u>% of Total</u> Assignments		Combined Status	<u>% of Total</u> Assignments
Complete	142	27.4%	240	46.2%	Complete	178	53.0%
About to Elapse	44	8.5%	28	5.4%	Incomplete	158	47.0%
Incomplete	14	2.7%	14	2.7%	Total Assignments	336	
Elapsed	136	26.2%	54	10.4%	Total Unique Employees	24	
Revised	0	0.0%	0	0.0%	Total Unique Tasks	336	
Total Assignments	336	64.7%	336	64.7%			

## **Requalification Report**

The main purpose of a Requalification Report is to obtain information on which Tasks are going to reach a status of About to Elapse or Elapsed by a certain date. This would likely be used by Training Coordinators as a tool in the planning of future courses.



This report is unique in that it does not show page breaks the same way as the other reports. Rather than simply scrolling down through a report, you may have to scroll both across and down this report. This is determined by the

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number of Org Units/ Employees are selected, and how many Tasks are selected for those Employees. In the above example, only one Organization Unit was selected (containing 24 Employees), and 15 Tasks were selected (each containing both Knowledge and Capability Components). Using a letter-sized report layout, the maximum number of components that can be displayed across is approximately 15. Therefore, this report ends up being 2 pages wide. Had this report comprised of more than one Organization Unit of the same approximate size (24x2), and the same Tasks, this report would be 2 pages high by 2 pages wide.

#### **Detail Lines**

	С	к	С	к	С	
	Comply with Confined Space Entry	Comply with Confined Space Entry	Comply with Confined Space Rescue	Comply with Confined Space Rescue	Comply with Hazardous Storage Requirements	Complete Ht. Doppederg
Laughlin, Nathan	11/18/2007	E	11/18/2007	E	1/2/2008	Г
Nicholson, Ernest	10/8/2007	10/8/2007	10/8/2007	10/8/2007	10/25/2007	1
Jameson, Rodney	11/18/2007	E	11/18/2007	E	1/2/2008	E
verson, Wayne	2/11/2010	1/30/2010	2/11/2010	1/30/2010	3/28/2010	R
Henninger, Andrew	E	E	E	E	E	1
Moffit, Terry	10/8/2007	10/2/2007	10/8/2007	10/2/2007	10/25/2007	1
Pernell, Robert	11/18/2007	E	11/18/2007	E	1/2/2008	Ŀ
Gilbreath, Roy	10/8/2007	9/16/2007	10/8/2007	9/16/2007	10/25/2007	ŀ

#### **Task Names/ Components**

Along the top axis, the Task names and their components appear. The components that actually appear is determined by three factors:

 what is selected in the options page of the Template Wizard. If the Knowledge Only component is selected, only the Knowledge will appear, regardless of if the Task contains a Capability or not.

Page 3 of 3	Select Requalification Repo	rt options.	
Organization Units	Report On C Knowledge Only	C Capability Only End Date 12/31/2007 11:59:59 PM	Both     Date
Learning Options		End Date  1231/2007 1133.35 PM	Date

- whether or not the Task contains the component at all. For example, if the Both option is selected, as in the above graphic, and the Task does not contain one of the components, only one component will appear for that Task.
- whether the Task component contains a duration Those Tasks that contain a particular component but that do not contain a duration will not appear in the Requalification Report. Seeing as the main purpose of this report is requalification status, and seeing as a Task component without a duration never requires requalification, it would be deemed as useless information.

#### Legend for grid

- **Date appearing in Orange** The report was generated based on an End Date in the future. This qualification is not currently elapsed, but will be by the End Date specified.
- **Date appearing in White** This qualification is considered complete, and will elapse on the date listed which occurs in the future (but further in the future than the specified End Date)
- E Elapsed This qualification for this Task Component is already elapsed.
- I Incomplete There is no qualification date for this Task Component.



#### **Possible Outcomes**

Contrary to the majority of the other reports, the Layout for the Requalification Report is not determined when creating the Report Template. Rather, it is selected in the Generate Report dialog, in the Layout field.

• Labels on every page - This format should be selected if you wish to export your results to an Adobe Acrobat PDF format. In this case, the names of the Employees are repeated on subsequent pages, making the document easier to understand and read.

TTG Syst	ems			Requ			rt - 2 Or ng Label		- HSE				4	TRAC	CCESS CI	TTG Syst	ems	
Universal Enterprise	s															14 Y C		
	С	К	С	к	С	к	С	К	С	к	C	к	С	к	С		к	
	Comply with Confined Space Entry	Comply with Confined Space Entry	Comply with Confined Space Rescue	Comply with Confined Space Rescue	Comply with Hazardous Storage Requirements	Comply with Hazardous Storage Requirements	Comply with Hazardous Exposure Response	Comply with Hazardous Exposure Response	Comply with Standard FirstAid	Comply with Standard FirstAid	Comply with Advanced FirstAid	Comply with Advanced First Aid	Complywith CPR	Complywith CPR	Comply with General PPE Requir ements		Comply with General PPE Requirements	Comply with PPE Maintenance and Repair
Laughlin, Nathan	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	Laughlin, Nathan	E	1/17.
Nicholson, Ernest	10/8/2007	10/8/2007	10/8/2007	10/8/2007	10/25/2007	11/22/2007	10/25/2007	11/22/2007	10/12/2007	11/9/2007	10/12/2007	11/9/2007	10/12/2007	11/9/2007	11/9/2007	Nicholson, Ernest	12/7/2007	11/9
Jameson, Rodney Iverson, Wayne	2/11/2010	E 1/30/2010	2/11/2010	E 1/30/2010	1/2/2008	E 3/16/2010	1/2/2008	E 3/16/2010	12/20/2007	E 3/3/2010	12/20/2007 3/15/2010	E 3/3/2010	12/20/2007	E 3/3/2010	1/17/2008	Jameson, Rodney verson, Wayne	E 3/31/2010	4/12
Henninger, Andrew	E	E	E	E	5/20/2010 E	5/10/2010 E	5/20/2010 E	E	E	5/5/2010 E	5/13/2010 E	5/5/2010 E	5/13/2010 E	5/5/2010 E	#/12/2010 E	Henninger, Andrew	5/51/2010 E	4/12
Moffit, Terry	10/8/2007	10/2/2007	10/8/2007	10/2/2007	10/25/2007	11/16/2007	10/25/2007	11/16/2007	10/12/2007		10/12/2007	11/3/2007	10/12/2007	11/3/2007	11/9/2007	Moffit, Terry	12/1/2007	11/9
Pernell Robert	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	Pernell Robert	E	1/17.
Gilbreath, Roy	10/8/2007	9/16/2007	10/8/2007	9/16/2007	10/25/2007	10/31/2007	10/25/2007	10/31/2007	10/12/2007	10/18/2007	10/12/2007	10/18/2007	10/12/2007	10/18/2007	11/9/2007	Gilbreath, Roy	11/15/2007	11/9
Quach, Mike	9/10/2007	10/3/2007	9/10/2007	10/3/2007	10/25/2007	11/17/2007	10/25/2007	11/17/2007	10/12/2007	11/4/2007	10/12/2007	11/4/2007	10/12/2007	11/4/2007	11/9/2007	Quach, Mike	12/2/2007	11/9
Yount, Jimmy	10/8/2007	E	10/8/2007	E	10/25/2007	9/28/2007	10/25/2007	9/28/2007	10/12/2007	9/15/2007	10/12/2007	9/15/2007	10/12/2007	9/15/2007	11/9/2007	Yount, Jimmy	10/13/2007	11/9
Comfort, Donald	11/18/2007	10/12/2007	11/18/2007	10/12/2007	1/2/2008	11/26/2007	1/2/2008	11/26/2007	12/20/2007	11/13/2007	12/20/2007	11/13/2007		11/13/2007	1/17/2008	Comfort, Donald	12/11/2007	1/17/
Dishman, Victor	10/9/2008					10/26/2008							11/10/2008			Dishman, Victor	11/10/2008	
Barber, Thomas	9/10/2007	9/14/2007	9/10/2007	9/14/2007	10/25/2007	10/29/2007 10/27/2008	10/25/2007	10/29/2007	10/12/2007	10/16/2007	10/12/2007	10/16/2007	10/12/2007	10/16/2007 10/14/2008	11/9/2007	Barber, Thomas	11/13/2007	11/9
Frank, Benjamin Oneill, Ryan	11/18/2007 E	9/12/2008 E	11/18/2007 E	9/12/2008 E	1/2/2008 E	10/2//2008 E	1/2/2008 E	10/2//2008 E	12/20/2007 E	10/14/2008 E	12/20/2007 E	10/14/2008 E	12/20/2007 E	10/14/2008 E	1/17/2008 E	Frank, Benjamin Oneill, Ryan	11/11/2008 E	1/1/1
Waddle, Johnny	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E.	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	Waddle, Johnny	E	1/17
Campbell, Eugene	10/8/2007	9/1/2007	10/8/2007	9/1/2007	10/25/2007	10/16/2007	10/25/2007	10/16/2007	10/12/2007	10/3/2007	10/12/2007	10/3/2007	10/12/2007	10/3/2007	11/9/2007	Campbell, Eugene	10/31/2007	11/9
Thorton, Keith	10/8/2007	E	10/8/2007	E	10/25/2007	10/12/2007	10/25/2007	10/12/2007	10/12/2007	9/29/2007	10/12/2007	9/29/2007	10/12/2007	9/29/2007	11/9/2007	Thorton, Keith	10/27/2007	11/9/
		E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	Sevigny, Peter	E	1/17/

• Labels on first page only - This format should be selected if you wish to export your results to a Microsoft Excel spreadsheet format. In this case, the names of the Employees are not repeated on subsequent pages, making the document easier to manipulate, without having to remove an extra column of information.

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TTG Sys	toms			Req	ualificat	ion Rep	ort - 2 (	Org Unit	s - HSE				A	TR	CCESS	a 🔡 11(	G SV	tem	9
III IIG Sys					N	lon-Repe	eating La	abels					2	TRA	ICCESS (		9 3ys		3
niversal Enterprises																1-31-			
	С	к	С	к	С	к	С	к	С	к	С	к	с	к	С	к	С	к	C
	Comply with Confined Space Entry	Comply with Confined Space Entry	Comply with Confined Space Rescue	Comply with Confined Space Rescue	Comply with Hazardous Storage Requirements	Comply with Hazardous Storage Requiements	Comply with Hazardous Exposure Response	Comply with Hazardous Exposure Response	Comply with Standard FirstAid	Comply with Standard FirstAid	Comply with Advanced FirstAid	Comply with Advanced First Aid	Comply with CPR	Comply with CPR	Complywith General PPE Requirements	Comply with General PPE Requirements	Comply with PPE Maintenance and Repair	Comply with PPE Maintenance and Repair	Comply with Fire & Explosion Awareness
aughlin, Nathan	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	E	1/17/2008	E	10/21/2
icholson, Ernest ameson, Rodney	10/8/2007	10/8/2007 E	10/8/2007	10/8/2007 E	10/25/2007	11/22/2007 E	10/25/2007	11/22/2007 E	10/12/2007	11/9/2007 E	10/12/2007	11/9/2007 E	10/12/2007	11/9/2007 E	11/9/2007	12/7/2007 E	11/9/2007	12/7/2007 E	9/1/20 10/21/2
verson, Wayne	2/11/2010	1/30/2010	And the second	1/30/2010	3/28/2010	3/16/2010	3/28/2010	-	3/15/2010	3/3/2010	3/15/2010	3/3/2010	3/15/2010	3/3/2010	4/12/2010	3/31/2010	4/12/2010	3/31/2010	1/14/2
enninger, Andrew	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E
loffit, Terry	10/8/2007	10/2/2007	10/8/2007	10/2/2007	10/25/2007	11/16/2007	10/25/2007	11/16/2007	10/12/2007	11/3/2007	10/12/2007	11/3/2007	10/12/2007	11/3/2007	11/9/2007	12/1/2007	11/9/2007	12/1/2007	9/1/20
ernell, Robert	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	E	1/17/2008	Ē	10/21/3
ilbreath, Roy	10/8/2007	9/16/2007	10/8/2007	9/16/2007	10/25/2007	10/31/2007	10/25/2007	10/31/2007	10/12/2007	10/18/2007	10/12/2007	10/18/2007	10/12/2007	10/18/2007	11/9/2007	11/15/2007	11/9/2007	11/15/2007	9/1/20
uach, Mike	9/10/2007	10/3/2007	9/10/2007	10/3/2007	10/25/2007	11/17/2007	10/25/2007	11/17/2007	10/12/2007	11/4/2007	10/12/2007	11/4/2007	10/12/2007	11/4/2007	11/9/2007	12/2/2007	11/9/2007	12/2/2007	9/1/20
ount, Jimmy	10/8/2007	E	10/8/2007	E	10/25/2007	9/28/2007	10/25/2007	9/28/2007	10/12/2007	9/15/2007	10/12/2007		and the second se	9/15/2007	11/9/2007	10/13/2007	11/9/2007	10/13/2007	9/1/20
omfort, Donald ishman, Victor	11/18/2007 10/9/2008	10/12/2007 9/11/2008	11/18/2007	10/12/2007 9/11/2008	1/2/2008	11/26/2007	1/2/2008	11/26/2007	12/20/2007	11/13/2007	12/20/2007	11/13/2007	12/20/2007	11/13/2007	1/17/2008	12/11/2007 11/10/2008	1/17/2008	12/11/2007	10/21/2
arber, Thomas	9/10/2007	9/14/2008	9/10/2007	9/14/2007	10/25/2008	10/29/2008	10/25/2007		10/12/2007	10/15/2008			10/12/2008	10/13/2008	11/9/2007	11/13/2007	12/8/2008	11/13/2008	9/11/2 F
rank, Benjamin	11/18/2007	9/12/2008		9/12/2008	1/2/2008	10/27/2008	Statistics in the second	10/27/2008		10/14/2008		10/14/2008		10/14/2008				11/11/2008	-
neill, Ryan	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E
Vaddle, Johnny	11/18/2007	Ê	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	E	1/17/2008	E	10/21/2
ampbell, Eugene	10/8/2007	9/1/2007	10/8/2007	9/1/2007	10/25/2007	10/16/2007	10/25/2007	10/16/2007	10/12/2007	10/3/2007	10/12/2007	10/3/2007	10/12/2007	10/3/2007	11/9/2007	10/31/2007	11/9/2007	10/31/2007	9/1/20
horton, Keith	10/8/2007	E	10/8/2007	E	10/25/2007	10/12/2007	10/25/2007	10/12/2007	10/12/2007	9/29/2007	10/12/2007	9/29/2007	10/12/2007	9/29/2007	11/9/2007	10/27/2007	11/9/2007	10/27/2007	9/1/20
evigny, Peter	11/18/2007	E	11/18/2007	E	1/2/2008	E	1/2/2008	E	12/20/2007	E	12/20/2007	E	12/20/2007	E	1/17/2008	E	1/17/2008	E	10/21/2

## **Summary Report**

The Summary Report shows the percent completion of an entire process by each employee. It is further divided into High Priority and Normal Priority Task completion. If you are not using High Priority Tasks, this field will always appear as 0 Tasks, 0 Complete for a percentage of 100%.

Please note: Someone who has completed all of their Knowledge Assessments, but who has not been signed off on Capability Assessments will appear as having 0% complete on this report.

Examples of uses of this report are:

• For Supervisors/ Administrators - to provide a quick "summary" of the completion of Processes by Employees, to be given to Management.

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Complete         123         23         240         44 5%         Complete         164         48 star           About 10 Elapse         14         2.6%         114         2.5%         114         2.5%         Total Assignments         336         7           Elapsed         154         2.6%         76         11.2%         Total Assignments         336         7           Total Assignments         336         6.2.6%         336         62.8%         7         Total Assignments         336         7           Agnew, Bentice         Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Confighte         14         10         71.4%         0         0         100.0%         14         10         71.4%           Agnew, Bentice         0         0         0         0         0         100.0%         14         10         71.4%           Universal Enterprises/UE Corporate/HSE         0         0         0         0         0         0         0         0         00.0%		TRAC	200				**2	ort - HSE Summ		5	ems	TTG Syst
Complete         123         230%         240         44 9%         Complete         164         368 and           About to Elepse         45         8.4%         6         11%         Incomplete         172         51           Incomplete         14         2.6%         74         76         142%         Total Massignments         336         77           Engred         154         2.8.%         76         142.%         Total Massignments         336         78           Total Assignments         336         62.8%         36         62.8%         78         172         78           Total Assignments         336         62.8%         36         62.8%         78         174         78         78           Agreew, Bestrice         0         0         100.0%         14         10         71.4%           Universal Entreprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Safer, Thomas         Universal Entreprises/UE Corporate/HSE         0         0         100.0%         14         7         50.%           Total Assignments         0         0         100.0%         14         7         50.%								Summary	1			
Complete         123         23 0%         240         44 9%         Complete         164         46           About to Elapse         45         8.4%         6         1.1%         incomplete         172         51           Elapsed         154         2.8%         76         14.2%         Total Assignments         336         7           Revised         0         0.0%         0         0.0%         7         Total Unique Employees         24         7           Total Assignments         336         62.8%         336         62.8%         7         Total Unique Employees         7		<u>% of To</u>	<u>Status</u>	combined S	Ç				<u>Capability</u>		Knowledge	
About to Elapse       45       8.4%       6       11%       Incomplete       172       51         Incomplete       154       2.8%       14       2.6%       336       72       73       74	3.8%			164			Complete		240		123	Complete
Incomplete         14         2.6%         14         2.6%         Total Assignments         336         7           Elapsed         154         2.8.3%         78         14.2.%         Total Massignments         336         24         Total Unique Employees         24         Total Unique Employees         24         Total Signments         336         78         14.2.%         Total Unique Employees         24         Total Complete         336         78         14.2.%         Total Complete         336         78         14.2.%         Total Signments         336         78         78         14.2.%         Total Signments         336         78         71         78         78         78         78         78         78	1.2%											
Elapseid         154         28.8%         76         14.2%         Total Unique Employees         24           Revised         0         0.0%         0         0.0%         70000         70000         70000<	7.7%					ents						
Revised         0         0.0%         0         0.0%         7 total Unique Tasks         336         336           Total Assignments         336         62.8%         336         62.8%         7 total Unique Tasks         336         336           Organized by Employee           High Priority         Notice           Total Complete         %         Notice         Notice           Universal Enterprises/UE Corporate/HSE         0         0         100 7/1.4%         Total X mode           Stating Corporate/HSE         0         0         100 7/1.4%         0         0         0         100 7/1.4%           Stating Corporate/HSE         0         0         100 7/1.4%         0         0         0         0         100 7/1.4%           Complete // Corporate/HSE         0         0         10         7/1.4%           Complete // Corporate/HSE         0         0         0         0         0					es							
Total Assignments         336         62.8%         Organized by Employee           High Priority         Hormal Priority         Hormal Priority         Total         Complete         %           Agnew, Beatrice         0         0         100.0%         14         10         71.4%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Nameer, Beatrice         0         0         100.0%         14         10         71.4%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Varieres all Enterprises/UE Corporate/HSE         14         10         71.4%         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Confort, Donad         0         0         100.0%         14         7         50.0%           Confort, Donad         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Universal En												
High Priority Total         Hormal Priority Complete         Hormal Priority Total         Hormal Prior							. oral ornique					
High Priority Total         Hormal Priority Complete         Hormal Priority Total         Hormal Priority Complete         Hormal Priority Total         Hormal Priority Complete         Hormal Priority Complete         Hormal Priority Total         Hormal Priority Complete         Hormal Priority Complete         Hormal Priority Total         Hormal Priority Complete         Hormal Prior Complete         Hormal Prior Complete						_		ed by Employee	Organiz			
Agnew, Beatrice         0         0         100.0%         14         10         71.4%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Sarber, Thomas         14         10         71.4%         0         0         100.0%           Universal Enterprises/UE Corporate/HSE         14         10         71.4%         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         7         50.0%           Control Assignments         0         0         100.0%         14         7         50.0%           Control Assignments         0         0         100.0%         14         7         50.0%           Control Assignments         0         0         100.0%         14         14         100.0%           Control Assignments         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0% <td>All</td> <td>nity</td> <td>rmal Prio</td> <td>No</td> <td>ity</td> <td>h Priori</td> <td>Hig</td> <td></td> <td></td> <td></td> <td></td> <td></td>	All	nity	rmal Prio	No	ity	h Priori	Hig					
Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Total Assignments         0         0         100.0%         14         10         71.4%           Varies         14         10         71.4%         0         0         0         100.0%         14         10         71.4%           Varies         14         10         71.4%         0         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Catal Assignments         14         10         71.4%         0         0         100.0%           Catal Assignments         0         0         100.0%         14         7         50.0%           Catal Assignments         0         0         100.0%         14         7         50.0%           Catal Assignments         0         0         100.0%         14         14         100.0%           Catal Assignments         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14	%	te %	Complet	Total	e %	omplete	Total (					
Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Total Assignments         0         0         100.0%         14         10         71.4%           Varies         14         10         71.4%         0         0         0         100.0%         14         10         71.4%           Varies         14         10         71.4%         0         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Charles Superstree SUE Corporate/HSE         0         0         100.0%         14         7         50.0%           Confirt, Donad         Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Interprises/UE Corporate/HSE												Annew, Reatrice
Total Assignments         0         0         100.0%         14         10         71.4%           Narber, Thomas         14         10         71.4%         0         0         100.0%           Total Assignments         14         10         71.4%         0         0         100.0%           Cal Assignments         14         10         71.4%         0         0         100.0%           Cal Assignments         14         10         71.4%         0         0         100.0%           Cal Assignments         0         0         100.0%         14         7         50.0%           Total Assignments         0         0         100.0%         14         7         50.0%           Confront, Donad         Universal EnterprisesUE Corporate/HSE         0         0         100.0%         14         14         100.0%           Isitman, Vicor         Universal EnterprisesUE Corporate/HSE         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         0         00	71.4	71.4%	10	14	100.0%	0	0				norate)HSE	
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Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Total Assignments         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         14         100.0%           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Total Assignments         0         0         100.0%         14         10         71.4%           rank, Benjamin         10         71.4%         10         71.4%         10.4%         1	100.0	100.0%	14	14	100.0%	0	0					
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imery, Rodney           Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Total Assignments         0         0         100.0%         14         10         71.4%           rank, Benjamin         0         0         100.0%         14         10         71.4%	100.0 100.0										poratevinse	
Universal Enterprises/UE Corporate/HSE         0         0         100.0%         14         10         71.4%           Total Assignments         0         0         100.0%         14         10         71.4%           Trank, Benjamin         Company         0         0         100.0%         14         10         71.4%	100.0	100.0%	14	14	100.0%	U	U					i otai Assignments
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## **Task Completion Report**

The Task Completion Report is a quick way to display whether or not an Employee is complete or incomplete on a Task - without all the summaries and dates. Completing this report first allows for a quick check on Employee-Task status, which could then be followed up by specific investigations using the Qualification Report.

As with the Requalification Report, this report can become both wide and high. The report allows for 10 Tasks to be shown on a single, letter-sized page. If more than 10 Tasks are to be reported on, the report will become more than a single page wide. Also, this report shows 24 Employees in a single Organization Unit. If more than one Organization Unit, with a similar number of Employees was selected in the Report Template, the report would become a minimum of 2 pages wide by 2 pages high.





II TIG Sy	/stems						Com s Rej												Т	RACO	CESS
		Comply with Advanced First Aid		Comply with Audiometric Testing Requirements		Comply with Confined Space Awareness		Comply with Confined Space Entry		Comply with Confined Space Rescue		Comply with CPR		Comply with Fire and Explosion Awareness		Comply with Fire and Explosion Emergency Response		Comply with General PPE Requirements		Comply with Hazardous Exposure Response	
		ĸ	С	ĸ	С	K	С	к	С	ĸ	С	к	С	ĸ	С	К	С	к	с	ĸ	С
Jniversal Enterprises	Laughlin, Nathan	0	•	0	•	0		0	•	0	•	0	•	0		0	•	0	•	0	
	Nicholson, Ernest		•	0	0	•	•		-	•	•	•	-	0	•	0	•		-	•	
	Jameson, Rodney	0	•	0	•	0	•	0	•	0		0	•	0	•	0	•	0	•	0	
	verson, Wayne		•	•	•			•	•	•		•	•		•		•				
	Henninger, Andrew	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Moffit, Terry			0	0					•		•		0	0	0	0				
	Emery, Rodney	•	•	0	0	0		0	•	0	•		•	0	0	0	0				
	Pernell, Robert	0		0		0	•	0		0		0		0	•	0	•	0		0	
	Gilbreath, Roy	•	•	0	0	0	•	0	•	0		•	•	0	0	0	0		•	•	
	Quach, Mike	•	•	0	0		0	•	0	•	0	•		0	0	0	0		•		
	Yount, Jimmy	0	•	0	0	0	•	0	•	0		0	•	0	0	0	0		•	•	
	Comfort, Donald		•	0			•	•	•	•		•		0		0	•				
	Dishman , Victor	•	•	•	•	•	•	•	•	•	•	•	•		•		•		•		
	Rice, Joshua	Q	•	0	0	0	•	0	•	0	•	0	•	0	0	0	0		•		•
	Barber, Thomas	•	•	0	0	0	0	0	0	0	0	•	•	0	0	0	Q	•		•	•
	Frank, Benjamin	•	•				•	•	•			•		•	•		•		•		•
	Oneill, Ryan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Kester, Russel	•		0	Q	•	•	•	•	•	•	•		0	0	0	0	•	•	•	•
	Waddle, Johnny	0	•	0	•	0	•	0	•	0	•	0	•	0		0	•	0	•	0	•
8/27/2007 1:06:13 P/ M/d/yyyy h:mm:ss tt	Zimmerman, Malika /I GMT -06:00 K - K Organization	o nowledge		onent Tas		pability	Compo		o - Inc		o te •-	Compl			o t Applic	able	0	Ge	enerate	<u> </u> ∞ d By Sy	o rstern, C Page

#### **Possible Outcomes**

As with the Requalification Report, the Layout for the Task Completion Report is not determined when creating the Report Template. Rather, it is selected in the Generate Report dialog, in the Layout field.

• Labels on every page - This format should be selected if you wish to export your results to an Adobe Acrobat PDF format. In this case, the names of the Employees are repeated on subsequent pages, making the document easier to understand and read.



A Report	▶ ₩ 1 /2	m m	(•		_			_												_		_			BusinessO
II TIG Sy	stems						<b>Com</b> ating												TI	RACO	ESS (	CI	II IIG	Sys	stems
		$\star$ Comply with Advanced First Aid	с	★ Comply with Audiometric Testing Requirements	c	★ Comply with Confined Space Awareness	c	$_{ m X}$ Comply with Confined Space Entry	с	★ Comply with Confined Space Rescue	c	★ Comply with CPR	с	→ Comply with Fire & Explosion Awareness	c	→ Comply with Fire & Explosion Emergency Response	c	$_{ m X}$ Comply with General PPE Requirements	с	★ Comply with Hazardous Exposure Response	c				
Jniversal Enterprises	Laughlin, Nathan	0		0	•	0		0	•	0		0		0	•	0		0	•	0			Universal Enterpris	es I	aughlin, Nathan
	Nicholson, Ernest		•	0	0		- ¥ -		•			¥.		0	0	0	o								Nicholson, Ernest
	Jameson, Rodney	0	•	0		0	•	0	•	0		o		0		0		o		0					lameson, Rodney
	verson, Wayne		•	•					•		•	•		•		•		•			•				verson, Wayne
	Henninger, Andrew	0	٥	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				lenninger, Andre
	Moffit, Terry		•	0	0	•		•	•	•	•	•		0	0	0	0	•	•	•	•				Moffit, Terry
	Emery, Rodney	•	•	0	0	0		0	•	0	•	•	•	0	0	0	0	•	•	•	•				Emery, Rodney
	Pernell, Robert	0	•	0	•	0	•	0	•	0	•	0	•	0	•	0		0	•	0	•				Pernell, Robert
	Gilbreath, Roy Guach, Mike	•		0	0	0	-	0	•	0	•		•	0	0	0	0	•	•		•				Gilbreath, Roy Quach, Mike
	auduri, mike		•	0	0		0		0	•	0	•	•	0	0	0	0	•	•		•		1	L.	Juach, Wike
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• Label on first page only - This format should be selected if you wish to export your results to a Microsoft Excel spreadsheet format. In this case, the names of the Employees are not repeated on subsequent pages, making the document easier to manipulate, without having to remove an extra column of information.

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Report	▶ H 1 /2 (	n at	•	_								_		_			_	_									Busine	ss Obje
II TIG Sy	rstems					<b>ask C</b> i-Repi													Т	RACO	CESS	CI	∃	Ī	īG	Sys	ste	m
		× Comply with Advanced First Aid	с		с	★ Comply with Confined Space Awareness	с	$_{ m X}$ Comply with Confined Space Entry	с	★ Comply with Confined Space Rescue	с		с	★ Comply with Fire & Explosion Awareness	с	★ Comply with Fire & Explosion ★ Emergency Response	с	$_{\rm X}$ Comply with General PPE Requirements	С	★ Comply with Hazardous Exposure Response	C		★ Comply with Hazardous Storage Requirements	с	x Comply with Noise Exposure Control	с	$\varkappa$ Comply with PPE Maintenance and Repair	С
Jniversal Enterprises	Laughlin, Nathan	0		0		0		0	•	0	•	0		0		0		0	•	0	•	1	0	•	0	•	0	•
	Nicholson, Ernest			0	0	•					•	•		0	0	0	0				•	1			0	0	•	•
	Jameson, Rodney	0	•	0		0		0	•	0	•	0		0		0	•	0	•	0	•		0	•	0	•	Q	•
	Iverson, Wayne						•				•	•		•			•				•					•	•	•
	Henninger, Andrew	0	0	0	0	0	0	0	0	0	o	0	0	0	o	0	0	0	0	0	o	1	0	0	0	٥	0	0
	Moffit, Terry	•	•	0	0	•	•		•	•	•	•		0	o	0	0				•	4	•	•	0	٥	•	•
	Emery, Rodney	•	•	0	0	0	•	0	•	0	•	•		0	0	0	0		•		•	1		•	0	٥	•	•
	Pernell, Robert	0	•	0		0	•	0	•	0	•	0		0		0	•	0	•	0	•	1	0	•	0	•	0	•
	Gilbreath, Roy	•		0	0	0	•	0		0		•		0	o	0	0				•				0	٥	•	•
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## **Task Summary Report**

The Task Summary Report allows you to select a Task (regardless of where it is assigned or where it appears in the system), and then select the Organization Units of Employees to report on. You also have the option to report on those who have completed the Task, or those who haven't.

Please note: the system does check to see if the selected Employee has access to the selected Task through one of their Organization Unit assignments. If a particular Employee had access to a Task in the past, had completed it, but was subsequently moved to different Organization Unit assignments without access to the Task, this employee will never show up on a "Complete" Task Summary Report.

The Task Status column will only reflect Complete or Incomplete Tasks, not both. However it will provide further information on type of complete or incomplete. For example, you may see:

- Selecting **Complete** will show the following possible states in the Task Status column:
  - Complete
  - About to Elapse
- Selecting **Incomplete** will show the following possible states in the Task Status column:
  - Incomplete
  - Elapsed
  - Revised

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1   K K 🕨 H   1 /8 🕅	AŶ -	в
TTG Systems	Task Summary - HSE	The correct
I IIG Systems	Show Only Complete	TRACCESS C
	Report Summary	
Total Unique Employees:	24	
Total Unique Tasks:	336	
Total Task Assignments:	336	
Total Complete Task Assignments:	175	
Total Incomplete Task Assignments:	161 52.1%	
Total Percent Complete:		
	Organized By Task	
Comply with Advanced First Aid		Task Status
Agnew, Beatrice		Complete
Barber, Thomas		Complete
Campbell, Eugene		Complete
Comfort, Donald		Complete
Dishman, Victor		Complete
Emery, Rodney		Complete
Frank, Benjamin		Complete
Gilbreath, Roy		Complete
lverson, Wayne		Complete
Kester, Russel		Complete
Moffit, Terry		Complete
Nicholson, Ernest		Complete
Quach, Mike		Complete
Rice, Joshua		About to Elapse
Thorton, Keith		About to Elapse
Yount, Jimmy		About to Elapse
Task Summary - Comply with Advanced First	Aid	
Total Employees:	24	
#Complete	16	
% Complete	67 %	
Comply with Audiometric Testing Requirements		
Comfort, Donald		About to Elapse
Dishman, Victor		Complete
Frank, Benjamin		Complete
Iverson, Wayne		Complete
8/31/2007 1:59:49 PM GMT -06:00		Generated By System, Own
M/d/yyyy h:mm:sstt	Task	Page 1 of
No.: 1	Total Page No.: 8	Zoom Factor: 100%

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