What's New in TRACCESS CI (8.4)

At TTG Systems, we are continuously changing and updating our software to meet the needs of our clients. The main features of TRACCESS CI (8.4) were incorporated to do just that.

Where other minor releases we have introduced several pieces of functionality in different areas, this one is focused on reporting:

- Custom Reports
- Report Properties
- Report Filtering
- Report Summaries

Custom Reports

Most customers have requested custom reporting functionality. A common comment about our reporting functionality is "It is great that you have these pre-built reports, but can I report on _____ also?" Now, if your reporting request relates to TRACCESS objects in some way, the answer to that question is yes.

There are three types of custom reports that can be integrated into TRACCESS CI:

- Mining the TRACCESS CI tables
- Mining the Data Warehouse tables
- TRACCESS CI/ External Data Source Hybrid

In order to decide which type of report you will be creating, answer the following questions:

1. What is it that you wish to report on?
2. Where is this information currently stored?

An example of each of the report types is as follows

- Mining the TRACCESS CI tables
  - Activity Report by Weekday - you wish to know on which day of the week there is the most activity in the system
- Mining the Data Warehouse tables
  - Employee/ Learning Assignment Progression - you wish to see a trend-based report showing how many Tasks an Employee is assigned, and the state of those Tasks over time.
- TRACCESS CI/ External Data Source Hybrid
  - Employee/ Vacation Listings - you wish to run a list report showing the start and end dates of all the people under your charge who have booked off holidays
  - The Employee names would be stored in TRACCESS, but the Vacation listings would be obtained from an external data source.

Once you have determined what information you wish to include in your report, you must have access to someone who knows how to use Crystal Reports, and how to work with relational databases. If you do not have access to such a person, TTG may be contracted to create custom reports to meet your needs. Please contact TTG Support for more information.

After your report files have been created, you can make use of TRACCESS CI's role permission sets, security features, and report filtering to generate your reports. All custom reports are added to TRACCESS CI using a wizard. The above three report examples will be added to TRACCESS CI, to show the different possible settings that can be chosen.

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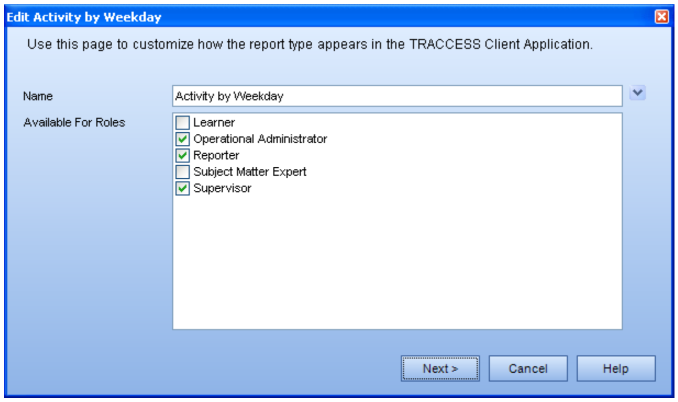
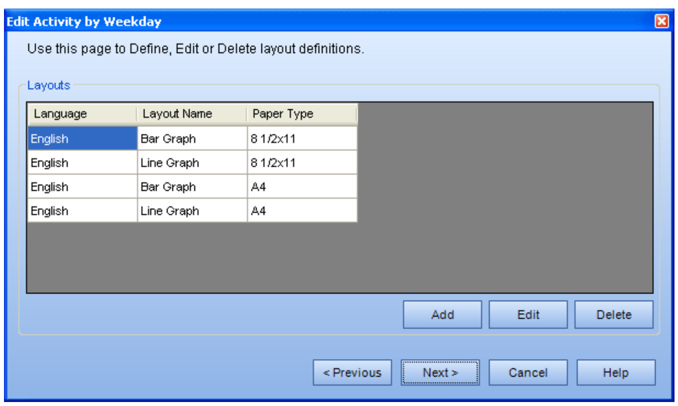
Custom Reports – Mining the TRACCESS Tables

The first page of the Custom Report wizard allows you to select which TRACCESS roles will be allowed to create this report. Since this is a modified Activity Report, that does not show the actual names of employees, you may wish to allow the Operational Administrators, Supervisors, and Reporters to generate this report.



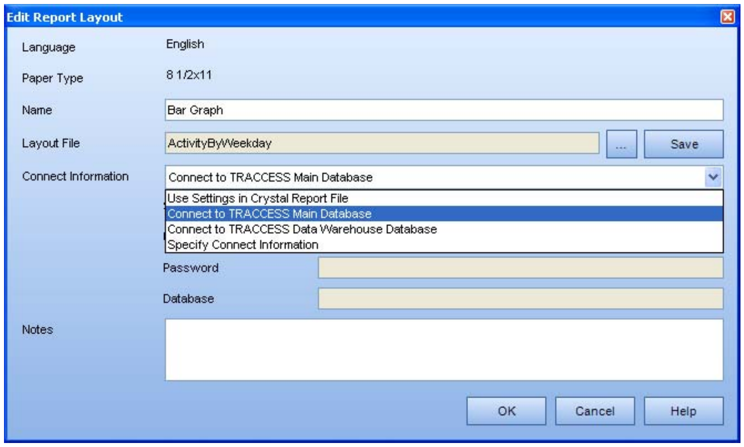
Custom Report Wizard

The second page allows you to add different report formats for the same report information. For example, you could have one report file with the information generated into a bar graph and the other in a line graph. This also accommodates for multi-national companies, who will require the reports in both Letter and A4 formats.



Add Layouts

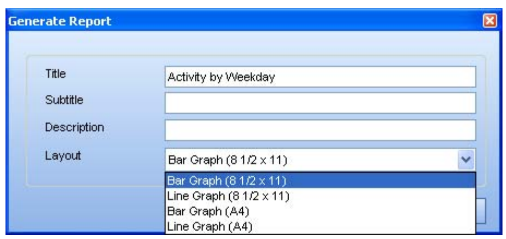
The connection to the report file is indicated when creating the report format. This allows you to connect to separate *.rpt files, as well as indicating where the data is stored.



Edit Report Layout

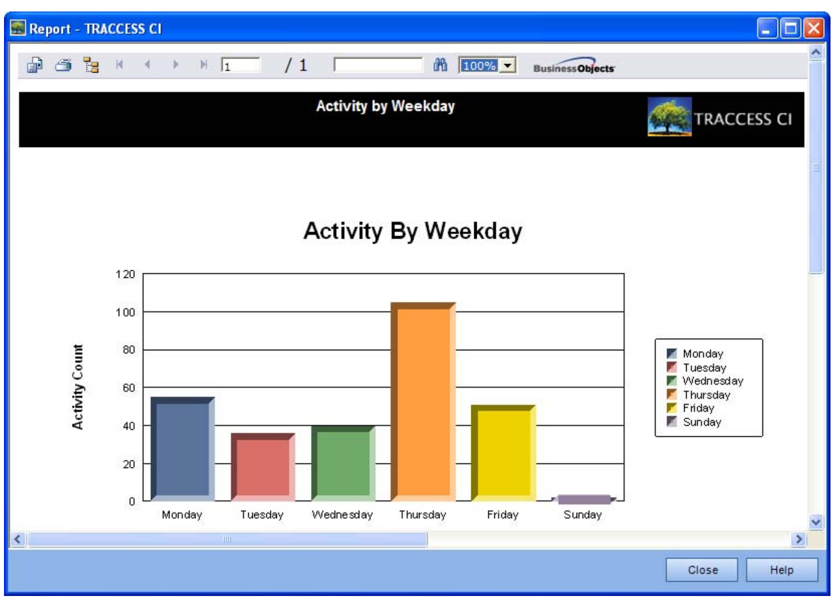
In the case of the Activity Report by Weekday, the information is found in the TRACCESS tables, and you would therefore select Connect to TRACCESS Main Database.

For this report, all of the required information has been selected. Since you have created more than one format of this report, you can select the format from the Generate Report dialog.



Generate Report dialog

If you only indicated a single report format, the Layout field in the Generate Report dialog will not appear.



Custom Report – Using Main TRACCESS Tables

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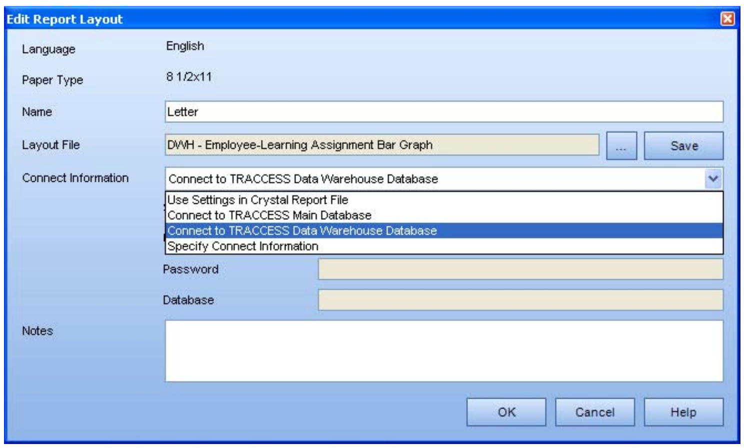
You will notice that the majority of activity on this particular database occurred on Thursdays.

Custom Report – Mining the Data Warehouse Tables (Employee/ Learning Assignment)

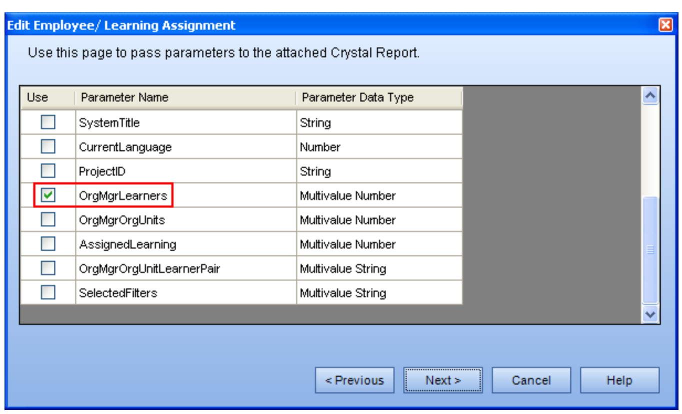
When adding a custom report into the system, you will have to ask the question, who may want to see this information. A Learner may wish to see information that deals with themself only. A Subject Matter Expert may be interested in seeing information within the Process Manager. In the case of an Employee/ Learning Assignment report, not only will an Operational Administrator, Supervisor and Reporter wish to see the information, they should only see the information for the Learners under their Organization Unit structures.

The first page of the custom report wizard will select Operational Administrators, Reporters and Supervisors – which is the same as the Activity by Weekday Report. However, when adding a report layout, you must indicate that this report is gathering information from the Data Warehouse tables to create a trend-based report.



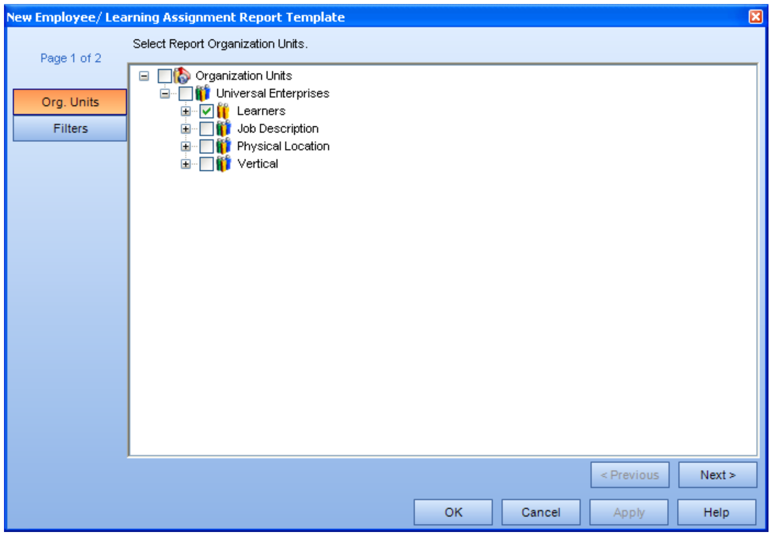
Connect to TRACCESS Data Warehouse Database

Although you have already indicated that you wish to have Operational Administrators, Reporters and Supervisors to be able to create this report, these roles in TRACCESS CI are dependant on an Organization structure. These roles can only see the Learners that they have access to. This setting was not required for the previous Activity report and was not shown. However, in another page of the Custom Report Wizard, you can indicate that you wish to select particular Organization Unit Learners by checking the following option.



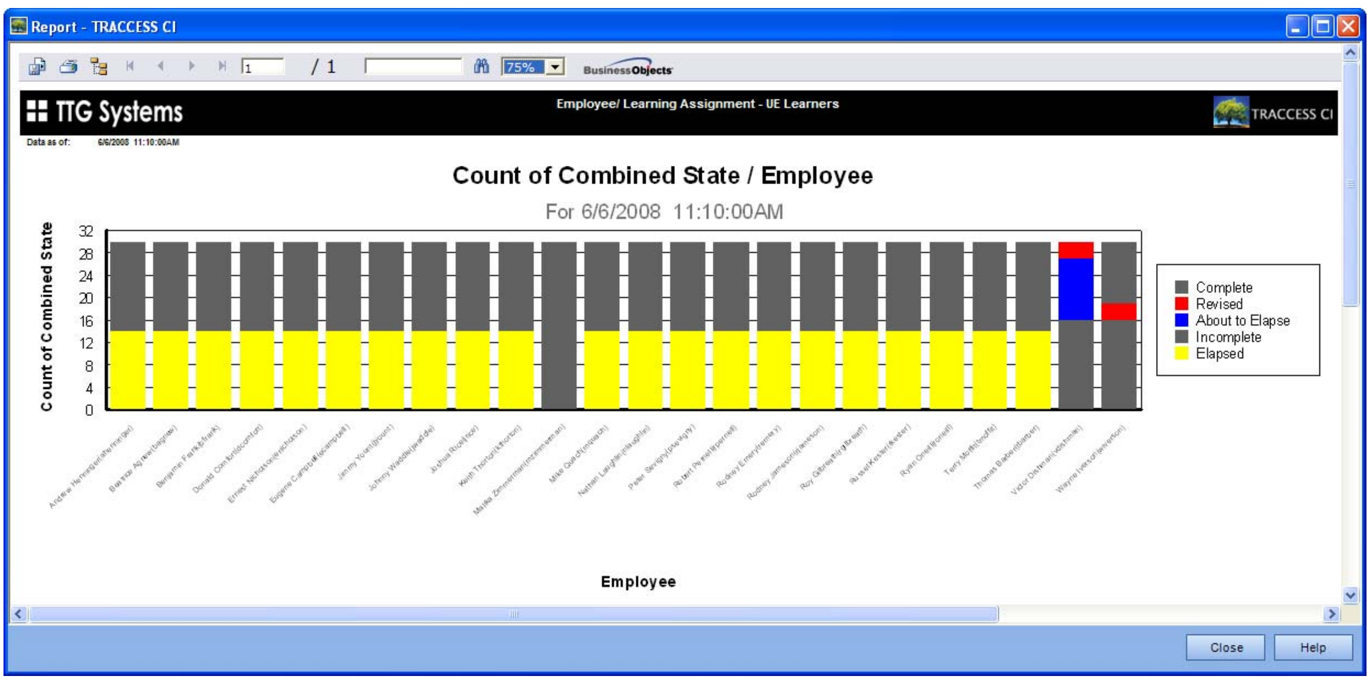
Enabling Selection of Particular Organization Unit Learners

The Activity Report did not require particular parameters to be set – it generated its results based on everyone in the database. However, generating this report will require that Organization Units and Learners are selected.



Employee/ Learning Assignment Template Wizard

As you can see, this wizard also makes use of report filters, which are also new to TRACCESS CI (8.4). See page 12 for more details.



Custom Report – Using Data Warehouse Tables

Custom Report – TRACCESS/ External Data Source Hybrid

Most companies have information stored in many locations. The information that they do have is often centered around the three of the main objects of TRACCESS: Employees, Organization Units and Tasks. For example, if another data source (Microsoft Excel spreadsheet, Access, SQL, Oracle databases) contains Employee information, and a piece of unique Employee information is identical between TRACCESS and the data source (i.e., Employee Number or Email Address), this unique information can be used as a validation string, and the information within the database can be reported on within TRACCESS.

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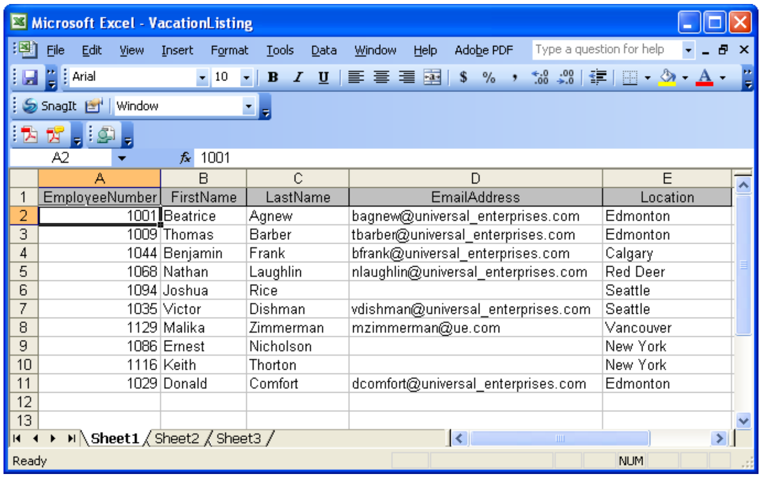
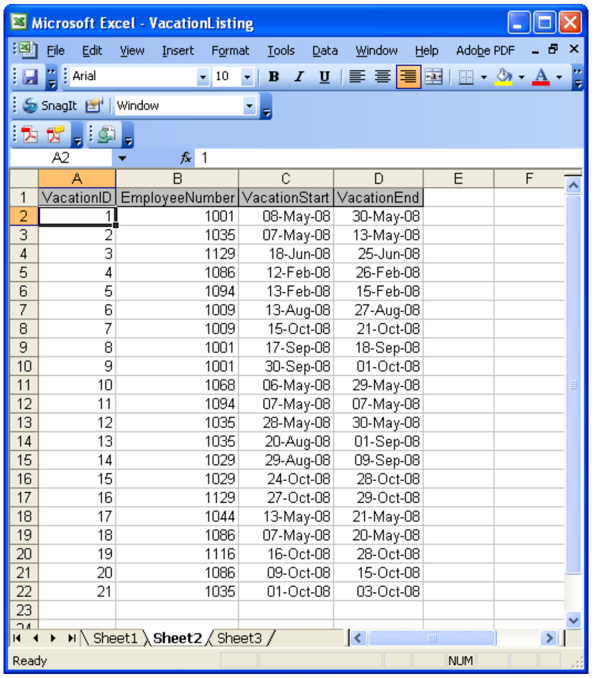
An example of such a file may be an Excel spreadsheet containing Vacation Listings. The first worksheet contains the personnel information – including Employee Number, First Name, Last Name, Email Address and Location (which is a custom field in TRACCESS).



EmployeeNumber	FirstName	LastName	EmailAddress	Location
1001	Beatrice	Agnew	bagnew@universal_enterprises.com	Edmonton
1009	Thomas	Barber	tbarber@universal_enterprises.com	Edmonton
1044	Benjamin	Frank	bfrank@universal_enterprises.com	Calgary
1068	Nathan	Laughlin	nlaughlin@universal_enterprises.com	Red Deer
1094	Joshua	Rice		Seattle
1035	Victor	Dishman	vdishman@universal_enterprises.com	Seattle
1129	Malika	Zimmerman	mzimmerman@ue.com	Vancouver
1086	Ernest	Nicholson		New York
1116	Keith	Thorton		New York
1029	Donald	Comfort	dcomfort@universal_enterprises.com	Edmonton

External Data Source

The second worksheet references the Employee Number, and shows vacation listings complete with start and end dates.



VacationID	EmployeeNumber	VacationStart	VacationEnd
1	1001	08-May-08	30-May-08
2	1035	07-May-08	13-May-08
3	1129	18-Jun-08	25-Jun-08
4	1086	12-Feb-08	26-Feb-08
5	1094	13-Feb-08	15-Feb-08
6	1009	13-Aug-08	27-Aug-08
7	1009	15-Oct-08	21-Oct-08
8	1001	17-Sep-08	18-Sep-08
9	1001	30-Sep-08	01-Oct-08
10	1068	06-May-08	29-May-08
11	1094	07-May-08	07-May-08
12	1035	28-May-08	30-May-08
13	1035	20-Aug-08	01-Sep-08
14	1029	29-Aug-08	09-Sep-08
15	1029	24-Oct-08	28-Oct-08
16	1129	27-Oct-08	29-Oct-08
17	1044	13-May-08	21-May-08
18	1086	07-May-08	20-May-08
19	1116	16-Oct-08	28-Oct-08
20	1086	09-Oct-08	15-Oct-08
21	1035	01-Oct-08	03-Oct-08

External Data Source

When creating the parameters for this custom report, since you are neither connecting to the main TRACCESS tables or to the Data Warehouse tables, you could either use settings that were entered in the Crystal Report file, or specify connection information. This example uses settings in the Crystal Report file.

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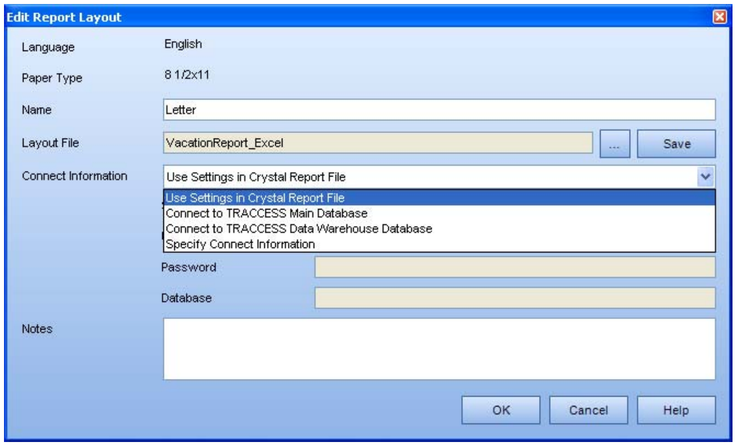
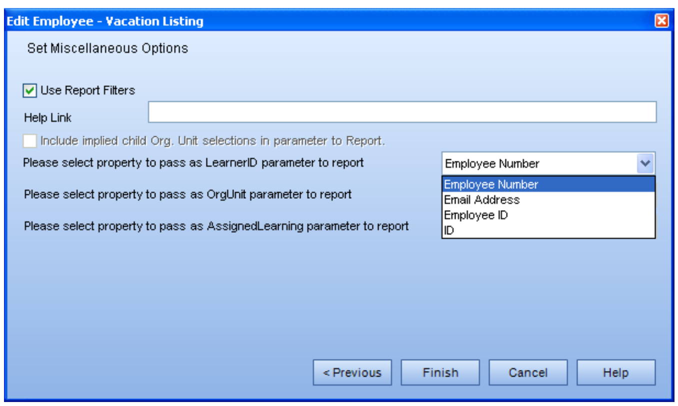


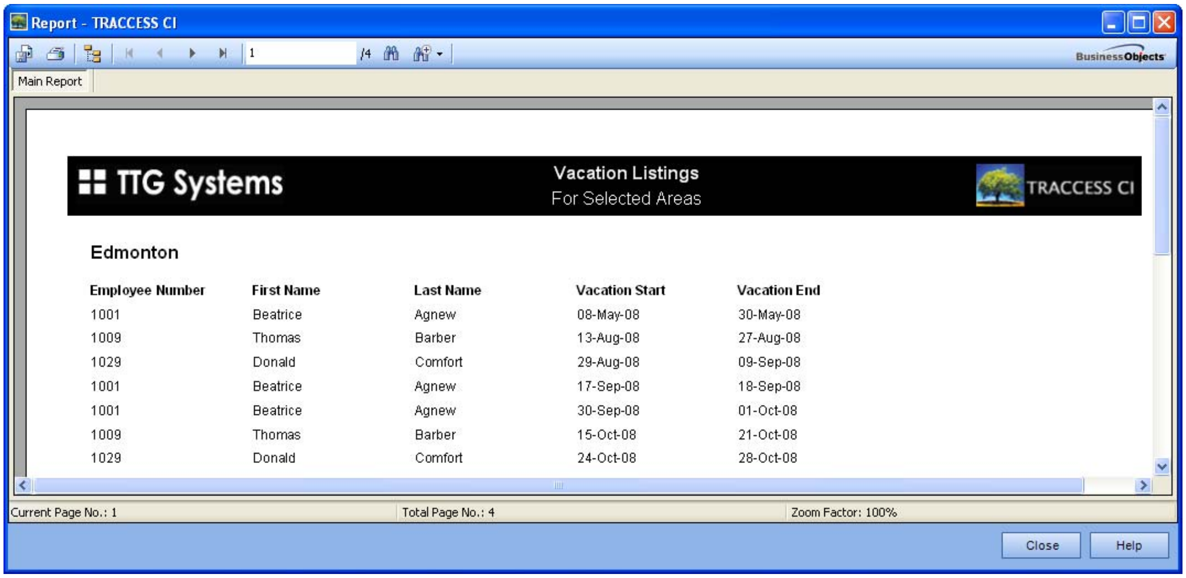
Using Settings in Crystal Report File

There must be a common field between the external database and the TRACCESS database. In most cases, your Employee Number and Email Addresses are assigned by your company and are not likely to change. The Employee ID (and internal TRACCESS Employee ID) are often specific to TRACCESS and are not likely to be contained within your external data source.



Specify Match Validation between TRACCESS and External Data Source

A sample custom hybrid report may look like this:



Custom Report – TRACCESS/ Data Source Hybrid

Interpret Report Properties

In the standard TRACCESS CI reports that are generated using Crystal Reports that are centered around Learner Qualification (this excludes the Requalification and Task Completion Reports), when selecting the parameters of the template, you are also able to specify particular properties of an object to be displayed in the report.

This selection applies to the following reports:

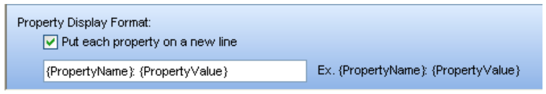
- Qualification
- Qualification (Compact)
- Summary
- Task Summary
- Training Information

The objects that are available are directly dependant on the output of the report. For example, a Qualification Report may display the Organization Unit name, the Employee name, the Process name, the Sub Process Name and the Task Name. However, a Summary Report will display an Employee's progress on a particular Process – therefore you only have two objects to select from.

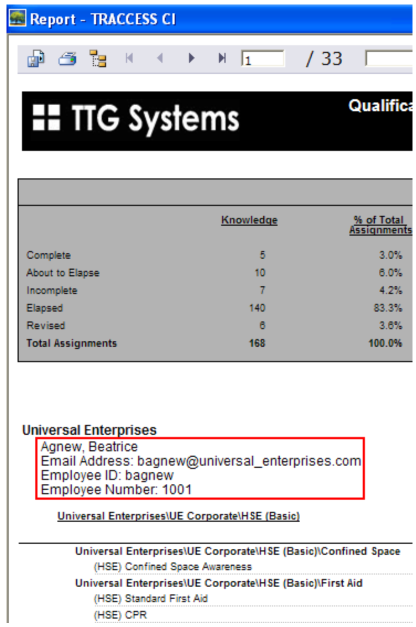
Regardless of what can be selected, the overall concept remains the same. The generated report will display the selected properties. This may allow you to export the information to an external spreadsheet to further manipulate the data.

Although this graphic is from the Qualification Report wizard, the same concept applies to all reports that contain a Properties page. From the listed objects, you can select any of the listed properties. This includes any custom properties that you may have added in the Object Definitions dialog. After selecting particular properties, there are a few different ways you may choose to display the information. This is done using the Property Display Format section of the page.

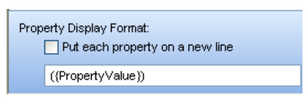
By default, this section lists:



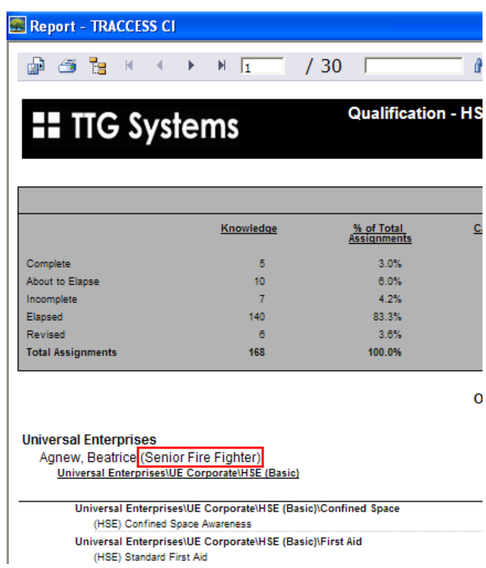
If you left the settings as is, and selected to view an Employee's Email Address, Employee ID, and Employee Number; your report would look like this:



Alternatively, you could change the Property Display Format section to:



In the following example, instead of selecting Email Address, Employee ID and Employee Number, a custom field of Rank was selected. Rather than placing the information on a separate line, this removes the actual Property Name of Rank and places the Property Value directly next to the Employee name.



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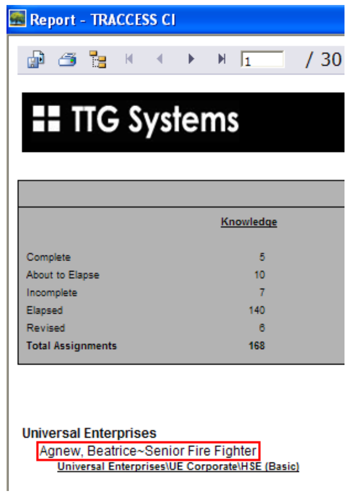
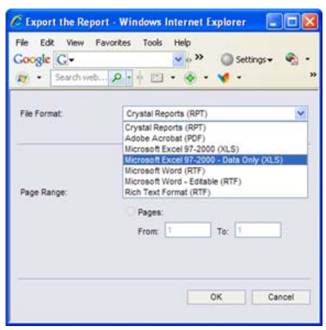
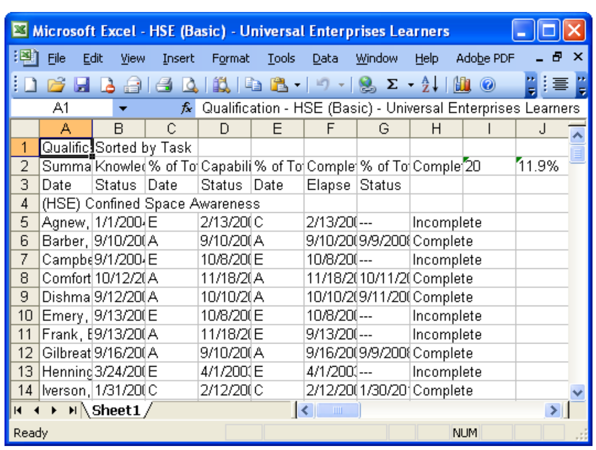
If you wanted to further manipulate your data using particular properties, these properties could be included in your reported, and separated by a special character. Since certain characters are fairly common and may appear in other places in your report, you may wish to use a special character that is seldom used (i.e., ~). In this case, your generated report would look very similar to the one below.



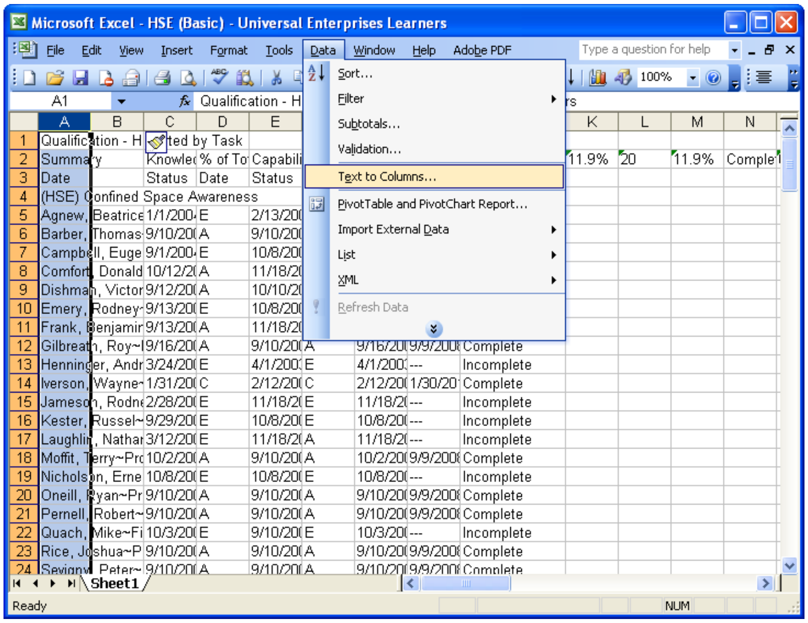
From here, you could export your results to Microsoft Excel using the  Export button.



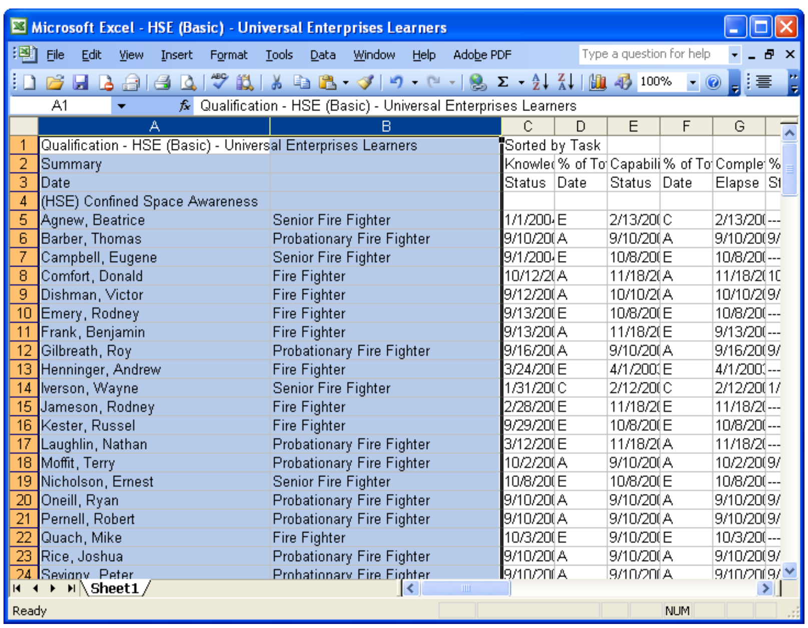
The resultant export will look like this:



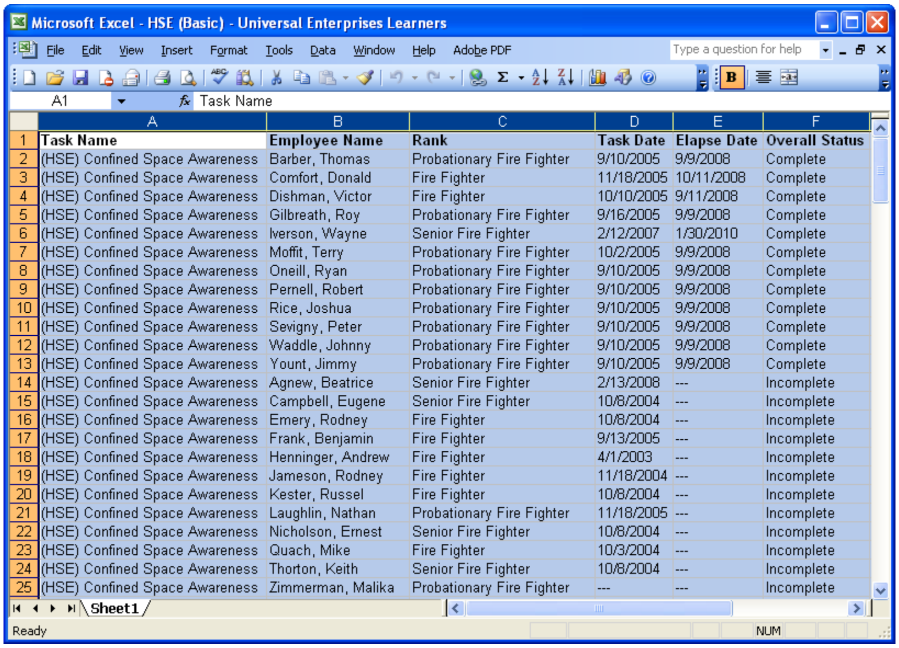
Microsoft Excel contains a function that allows you to separate the contents of a cell based on a special character. This function is found under Data/ Text to Columns from the main menu. Before doing so, insert a column to the right of the Employee Name field.



Your property value will be moved to the adjacent field, and can then be used as a sort field in Excel.



With a few more adjustments to this spreadsheets, using the Data/ Sort by Task Name and Overall Status columns, you could see if the Rank of an Employee affects whether or not they are complete on Tasks. In this case, Probationary Fire Fighters tend to have more completions on the selected Tasks than Fire Fighters and Senior Fire Fighters do.



	A	B	C	D	E	F
1	Task Name	Employee Name	Rank	Task Date	Elapse Date	Overall Status
2	(HSE) Confined Space Awareness	Barber, Thomas	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
3	(HSE) Confined Space Awareness	Comfort, Donald	Fire Fighter	11/18/2005	10/11/2008	Complete
4	(HSE) Confined Space Awareness	Dishman, Victor	Fire Fighter	10/10/2005	9/11/2008	Complete
5	(HSE) Confined Space Awareness	Gilbreath, Roy	Probationary Fire Fighter	9/16/2005	9/9/2008	Complete
6	(HSE) Confined Space Awareness	Iverson, Wayne	Senior Fire Fighter	2/12/2007	1/30/2010	Complete
7	(HSE) Confined Space Awareness	Moffit, Terry	Probationary Fire Fighter	10/2/2005	9/9/2008	Complete
8	(HSE) Confined Space Awareness	Oneill, Ryan	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
9	(HSE) Confined Space Awareness	Pernell, Robert	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
10	(HSE) Confined Space Awareness	Rice, Joshua	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
11	(HSE) Confined Space Awareness	Sevigny, Peter	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
12	(HSE) Confined Space Awareness	Waddle, Johnny	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
13	(HSE) Confined Space Awareness	Yount, Jimmy	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
14	(HSE) Confined Space Awareness	Agnew, Beatrice	Senior Fire Fighter	2/13/2008	---	Incomplete
15	(HSE) Confined Space Awareness	Campbell, Eugene	Senior Fire Fighter	10/8/2004	---	Incomplete
16	(HSE) Confined Space Awareness	Emery, Rodney	Fire Fighter	10/8/2004	---	Incomplete
17	(HSE) Confined Space Awareness	Frank, Benjamin	Fire Fighter	9/13/2005	---	Incomplete
18	(HSE) Confined Space Awareness	Henninger, Andrew	Fire Fighter	4/1/2003	---	Incomplete
19	(HSE) Confined Space Awareness	Jameson, Rodney	Fire Fighter	11/18/2004	---	Incomplete
20	(HSE) Confined Space Awareness	Kester, Russel	Fire Fighter	10/8/2004	---	Incomplete
21	(HSE) Confined Space Awareness	Laughlin, Nathan	Probationary Fire Fighter	11/18/2005	---	Incomplete
22	(HSE) Confined Space Awareness	Nicholson, Ernest	Senior Fire Fighter	10/8/2004	---	Incomplete
23	(HSE) Confined Space Awareness	Quach, Mike	Fire Fighter	10/3/2004	---	Incomplete
24	(HSE) Confined Space Awareness	Thorton, Keith	Senior Fire Fighter	10/8/2004	---	Incomplete
25	(HSE) Confined Space Awareness	Zimmerman, Malika	Probationary Fire Fighter	---	---	Incomplete

Interpret Report Filtering

In the initial release of TRACCESS CI, we introduced a report called the Organization Report. One of the pages in the Organization Report wizard was the creation of Filters. These filters allow you to further focus on information, to only see what you absolutely wanted to see.

Filters were created using the objects and their properties available in the report. For example, in an Organization Report, the main object is Employees. An employee has several properties including:

- Account Created On
- Account Status
- Can Change Password
- Email Address
- Employee ID
- Employee Number, etc.

Two sample filters could then be: Email Address Does Not Exist and Account Status Equals Inactive. You could then decide whether you wanted results that met both filters, or either of the filters.

The first filter would be useful in order to know who does not have an email address, and therefore has not been receiving TRACCESS messages. The second would be useful if you have been using the Inactive Status instead of Archived, and you wish to Archive those individuals.

After receiving positive feedback on the creation of filters in reports by our customers, we decided to implement this feature in most of the other integrated reports. These include:

- Qualification
- Qualification (Compact)
- Requalification
- Summary
- Task Completion
- Task Summary

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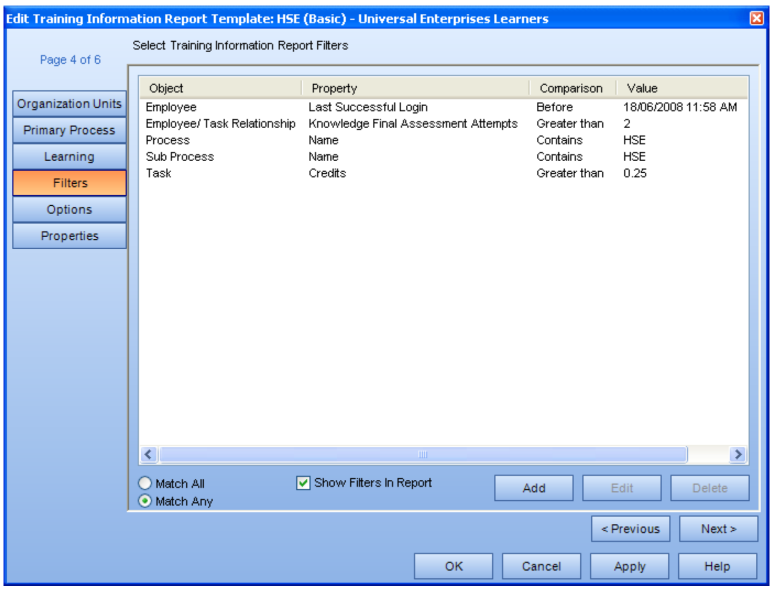
- Training Information

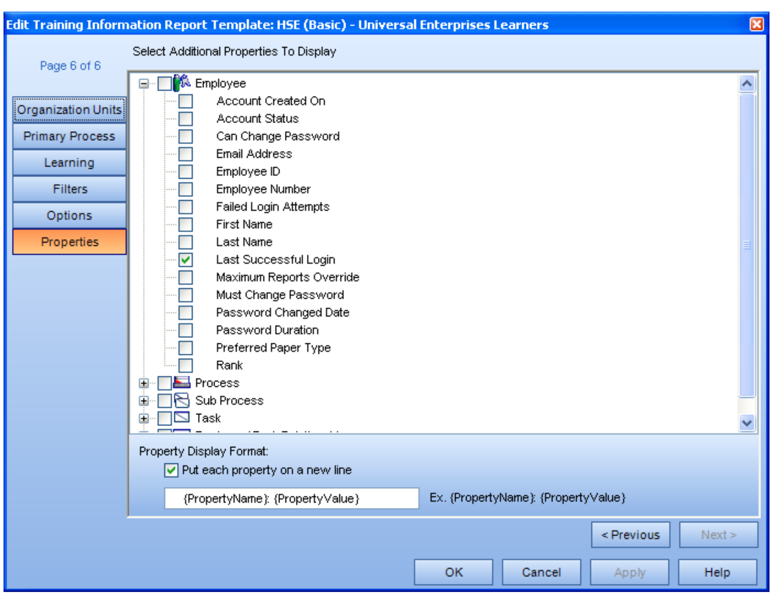
Since these reports deal with more than just the Employee object, you can also create filters for:

- Employee
- Employee/ Task Relationship
- Process
- Sub Process
- Task
- Task with Levels

In the following example, you will see a sample filters that have been created for a Training Information report.



To show that the filters are displaying the correct information, the example combines the Report Filters function and the Report Properties function.



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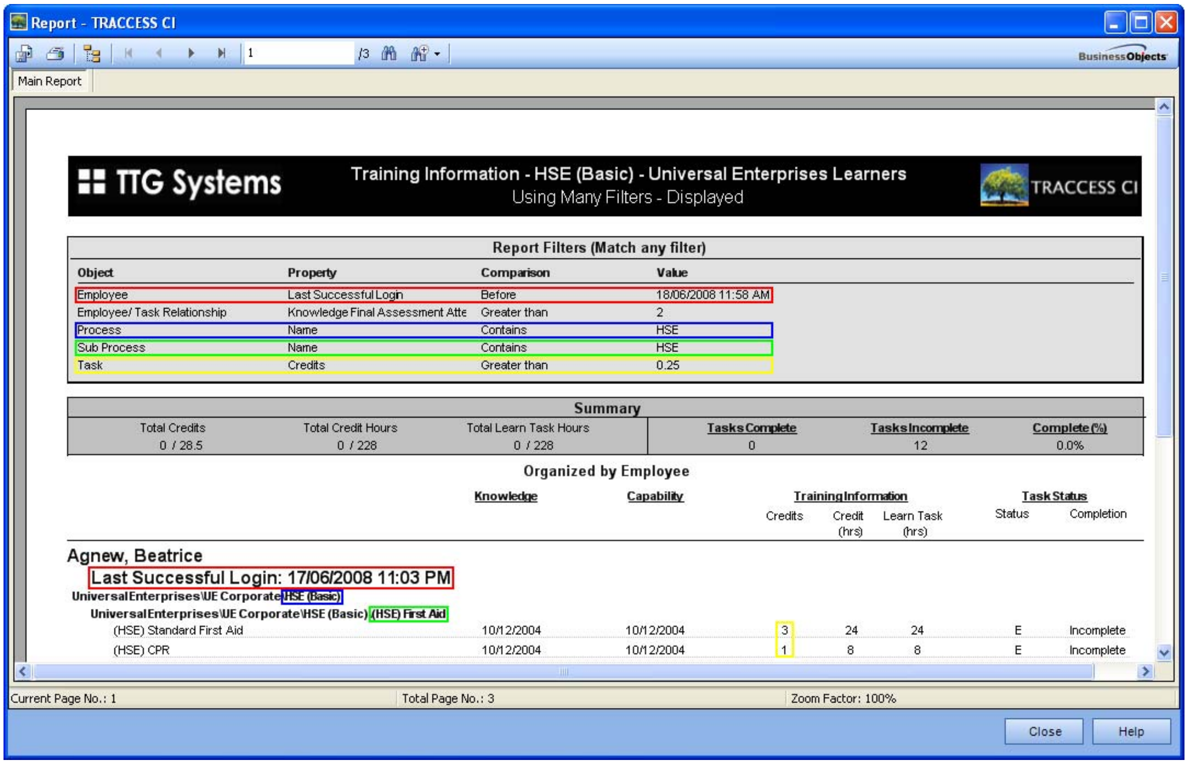
By selecting the Show Filters in Report field in the Filters page of the wizard, the Filters are listed at the top of the generated report.

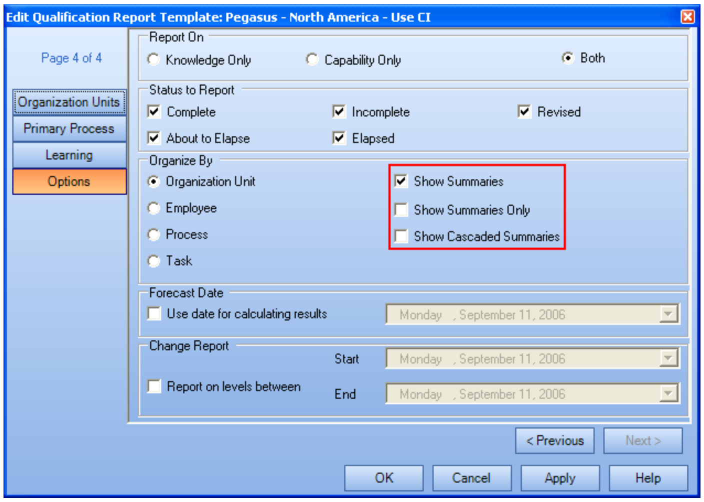


Interpret Report Summaries

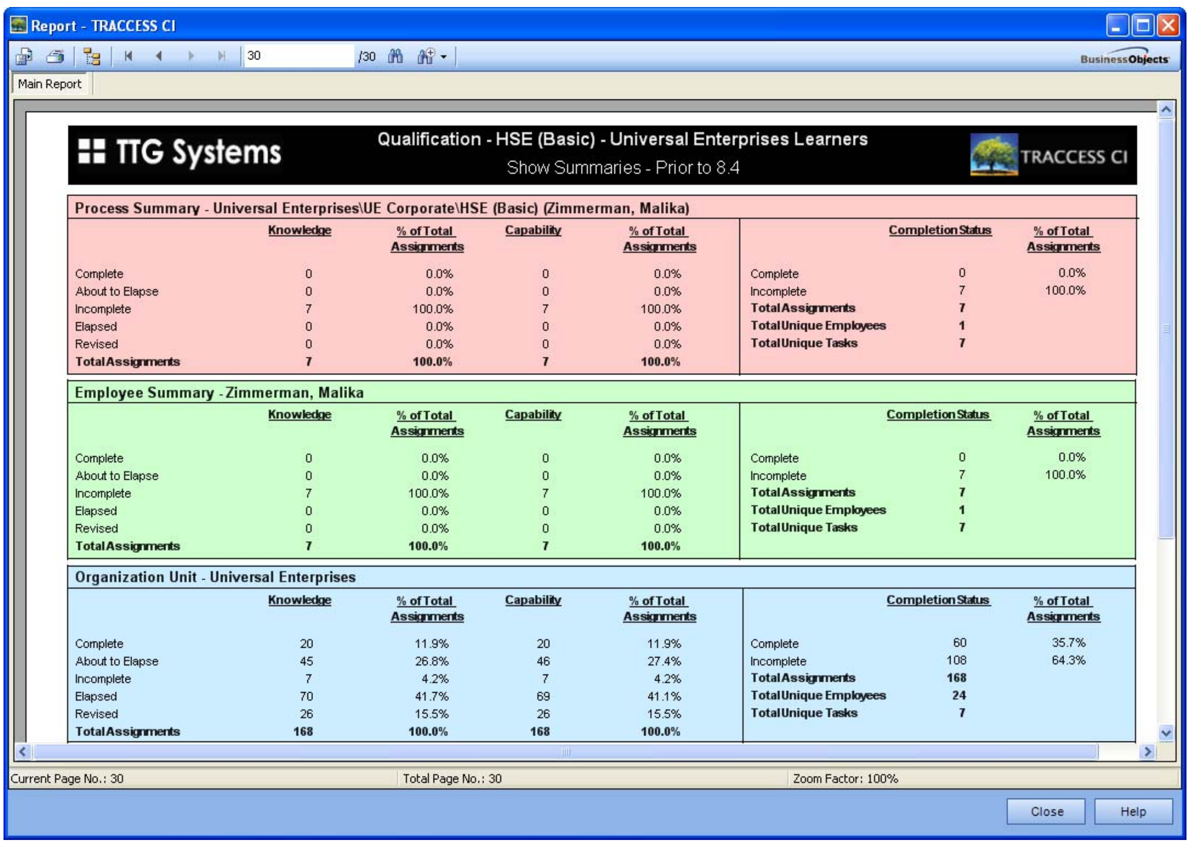
In three of the integrated reports in TRACCESS CI, there are several types of summaries that can be displayed depending on the way you choose to organize your information. These include:

- Qualification Report
- Qualification (Compact) Report
- Training Information Report

In versions of CI prior to 8.4, the Summaries that were actually shown on these reports could not be selected. You could either get all Summaries (Organization Unit, Process, and Employee) or no Summaries. In certain cases, these summaries contained the exact same information. For example, when doing any of the above reports, the Options page of the wizard looked much like the following graphic:



If you decided to report on a single Organization Unit, on a single Process, organized by Organization Unit, the Summaries you would receive would be a Process Summary at the end of every person, an Employee Summary at the end of every person, and an Organization Summary at the end of the Organization Unit. The first two summaries would ALWAYS contain the same information, as in the following graphic.



Process Summary - Universal Enterprises\UE Corporate\HSE (Basic) (Zimmerman, Malika)

	Knowledge	% of Total Assignments	Capability	% of Total Assignments		Completion Status	% of Total Assignments
Complete	0	0.0%	0	0.0%	Complete	0	0.0%
About to Elapse	0	0.0%	0	0.0%	Incomplete	7	100.0%
Incomplete	7	100.0%	7	100.0%	**Total Assignments**	**7**	
Elapsed	0	0.0%	0	0.0%	**Total Unique Employees**	**1**	
Revised	0	0.0%	0	0.0%	**Total Unique Tasks**	**7**	
Total Assignments	**7**	**100.0%**	**7**	**100.0%**			

Employee Summary - Zimmerman, Malika

	Knowledge	% of Total Assignments	Capability	% of Total Assignments		Completion Status	% of Total Assignments
Complete	0	0.0%	0	0.0%	Complete	0	0.0%
About to Elapse	0	0.0%	0	0.0%	Incomplete	7	100.0%
Incomplete	7	100.0%	7	100.0%	**Total Assignments**	**7**	
Elapsed	0	0.0%	0	0.0%	**Total Unique Employees**	**1**	
Revised	0	0.0%	0	0.0%	**Total Unique Tasks**	**7**	
Total Assignments	**7**	**100.0%**	**7**	**100.0%**			

Organization Unit - Universal Enterprises

	Knowledge	% of Total Assignments	Capability	% of Total Assignments		Completion Status	% of Total Assignments
Complete	20	11.9%	20	11.9%	Complete	60	35.7%
About to Elapse	45	26.8%	46	27.4%	Incomplete	108	64.3%
Incomplete	7	4.2%	7	4.2%	**Total Assignments**	**168**	
Elapsed	70	41.7%	69	41.1%	**Total Unique Employees**	**24**	
Revised	26	15.5%	26	15.5%	**Total Unique Tasks**	**7**	
Total Assignments	**168**	**100.0%**	**168**	**100.0%**			

In version 8.4, the Options dialog (Summaries section) has been changed to list the individual Summaries.

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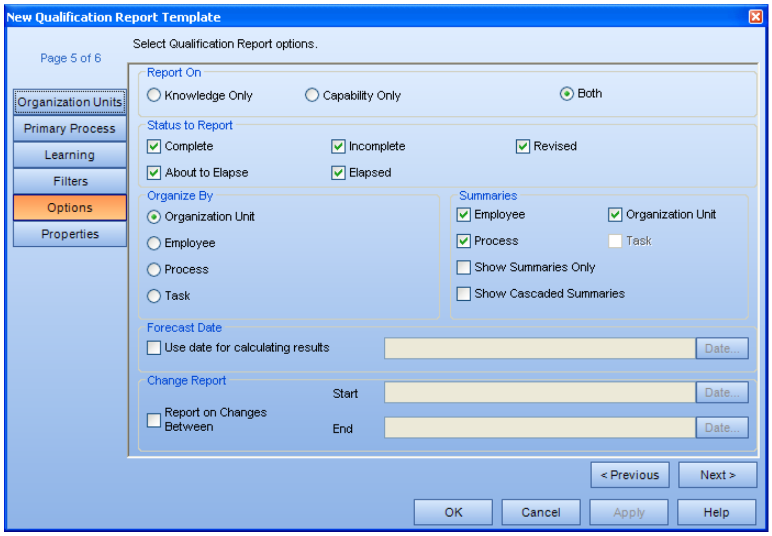
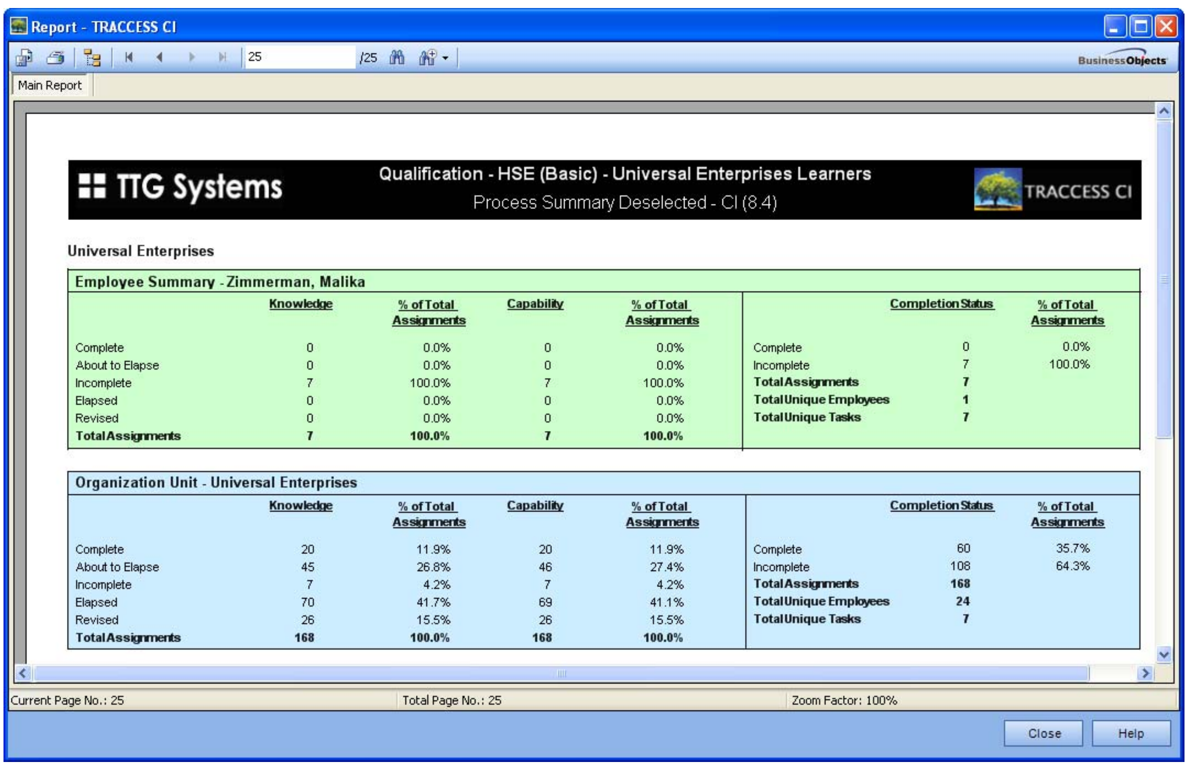


By simply deselecting the Process Summary, the same parameters will generate a smaller report – removing the redundant summaries.



Employee Summary - Zimmerman, Malika

	Knowledge	% of Total Assignments	Capability	% of Total Assignments
Complete	0	0.0%	0	0.0%
About to Elapse	0	0.0%	0	0.0%
Incomplete	7	100.0%	7	100.0%
Elapsed	0	0.0%	0	0.0%
Revised	0	0.0%	0	0.0%
Total Assignments	**7**	**100.0%**	**7**	**100.0%**

	Completion Status	% of Total Assignments
Complete	0	0.0%
Incomplete	7	100.0%
Total Assignments	**7**	
Total Unique Employees	**1**	
Total Unique Tasks	**7**	

Organization Unit - Universal Enterprises

	Knowledge	% of Total Assignments	Capability	% of Total Assignments
Complete	20	11.9%	20	11.9%
About to Elapse	45	26.8%	46	27.4%
Incomplete	7	4.2%	7	4.2%
Elapsed	70	41.7%	69	41.1%
Revised	26	15.5%	26	15.5%
Total Assignments	**168**	**100.0%**	**168**	**100.0%**

	Completion Status	% of Total Assignments
Complete	60	35.7%
Incomplete	108	64.3%
Total Assignments	**168**	
Total Unique Employees	**24**	
Total Unique Tasks	**7**	

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