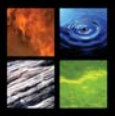
What's New in TRACCESS CI (8.5)?



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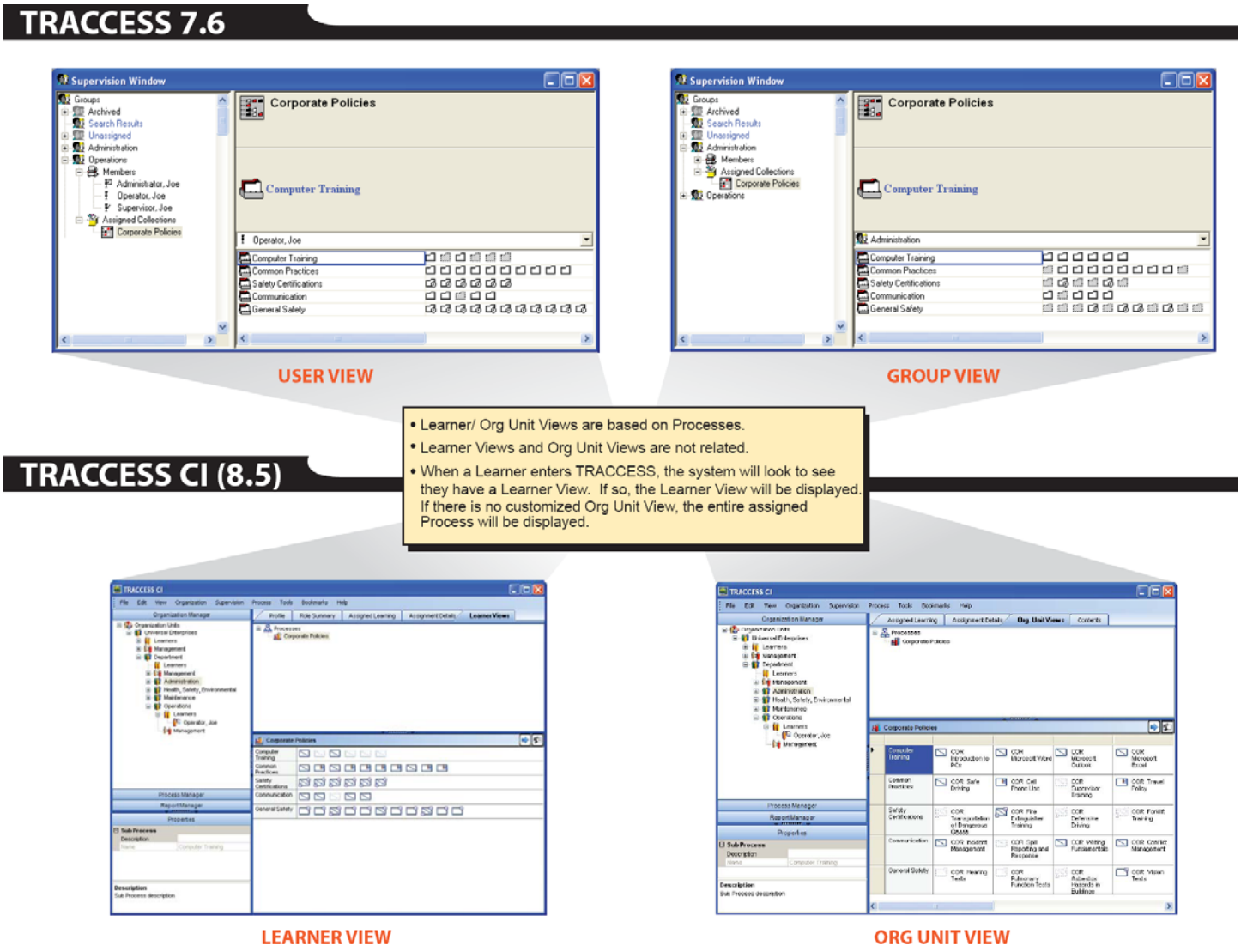
What's New in TRACCESS CI (8.5)

At TTG Systems, we are continuously changing and updating our software to meet the needs of our clients. The main features of TRACCESS CI (8.5) were incorporated to do just that.

Organization Unit and Learner Views are back! (*aka Group/ User Views*)

For those customers who have migrated from our previous functionality, the above statement makes sense. For those whose first experience with TRACCESS is CI, this is new and potentially life-changing (*an attempt at injecting excitement into a software document*).

In previous versions, Administrators/ Supervisors had the ability to customize what an entire group, or an individual user within a group, was able to see of the process that was assigned to them. This meant that even if an entire group should see most of the tasks within a process, the process could be assigned, and subsequently specific tasks could be hidden from their view. The same could be said for an individual user. These became known as Group and User Views.



With the introduction of cascaded learning, the way that learning can be assigned changes what functionality is required. Instead of assigning a large process to everyone, and making customizations afterwards, the goal of

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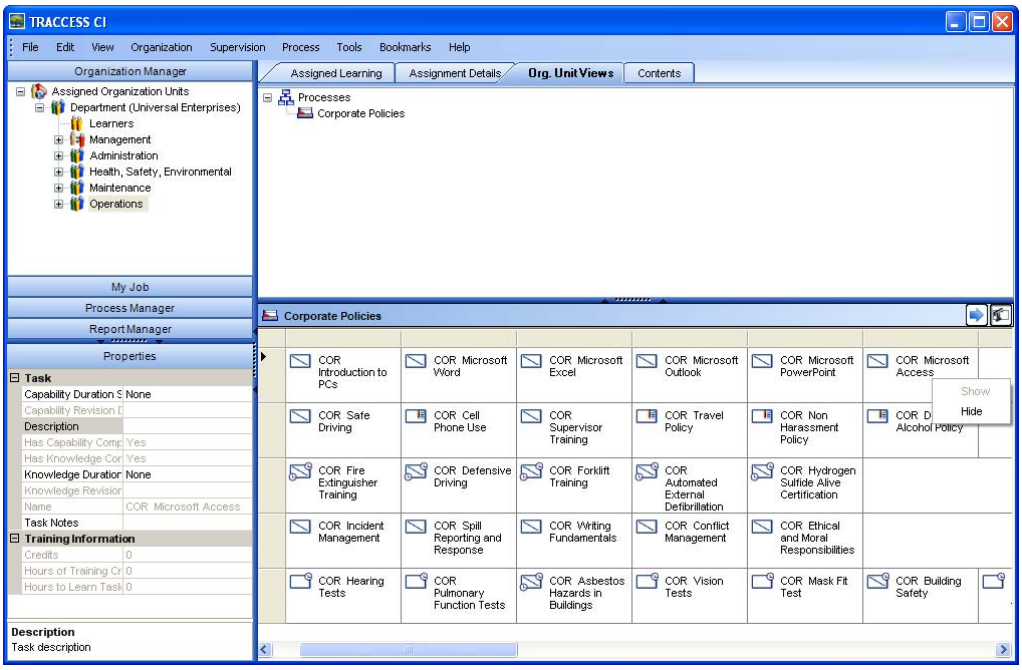
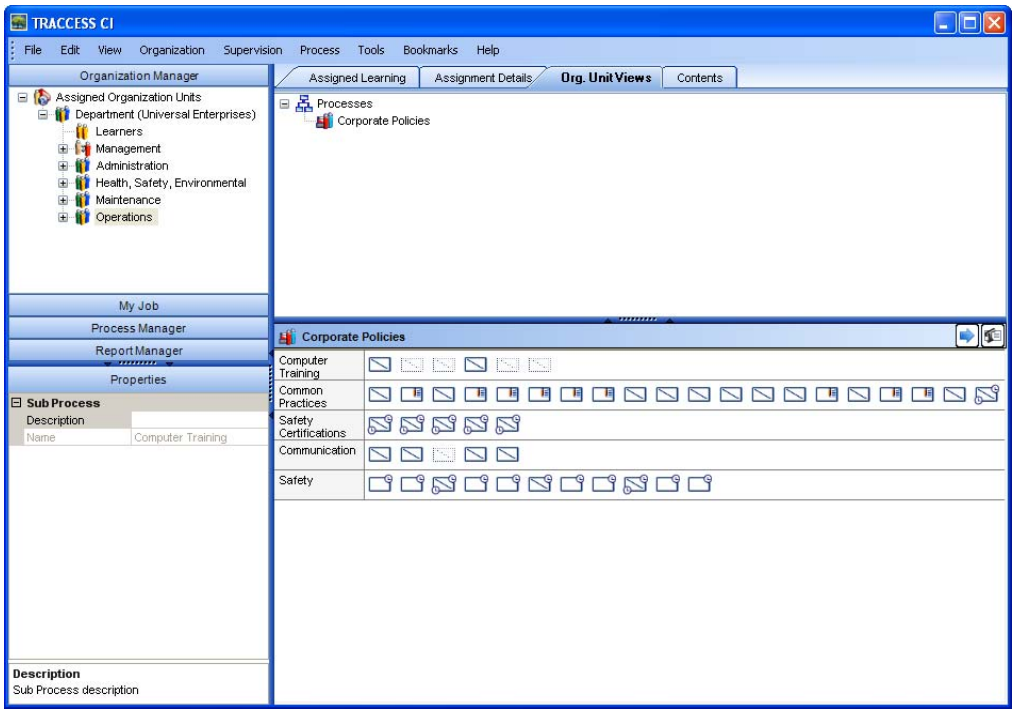
TRACCESS CI is to remove common learning into a separate process, and assign it at the top. Tasks would only be stored in Processes based on who requires this learning.

However, even with the introduction of cascaded learning, customers have let us know that there is still the need for customizations to be made at the Organization Unit and Learner level at times – which led to the design of this functionality in TRACCESS CI. Although the look of the program is different, the end result is the same.





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Where there has been a customization at the Organization Unit level, the icon replaces the icon. Similarly, where there has been a customization at the Learner Level, the or replaces the or (dependent upon whether the customization is done on a regular process, or the Learner's primary process).

TRACCESS CI combines the concepts of cascaded learning and organization unit views to allow these settings to be quickly completed for related Organization Units. For example, if you do not wish for a particular Organization Unit to have specific learning, whatever modifications are made to the Organization Unit View are cascaded to any child Organization Units that stem from this parent.

Merge Employees and Tasks

During the course of the "life of the database", several changes may occur. There may be TRACCESS Administrator employee turnover, management turnover, legislation changes, course changes/ additions/ deletions, etc. that may all affect the content and structure of the TRACCESS database. Regardless of cause, the result can be duplicate tasks and duplicate employee profiles. Manually attempting to merge the two "like" objects inevitably results in a loss of some kind of information and is prone to human error.

TRACCESS CI (8.5) introduces the merge employees and merge tasks functionality. Separately, these functions are no simple endeavor.

Merge Employees keeps both profiles':

- Bookmarks
- Events
- Group Assignment
- Schedule/ Activities
- Report Templates, Report Sharing
- Task Ownership
- Qualifications
    - SCORM Results
    - Set Qualification Dates
    - Import Learning Records
    - Capability Records (ASSESS - with Coaching Reports, Internal, External Form)
    - Knowledge Assessment Completion - and Saved Assessments
    - Scanned Attachments

Merge Tasks keeps both objects':

- Bookmarks
- Events
- Process Assignment (unless it is already in the same sub process)
- Schedule/ Activities
- Report Templates, Report Sharing
- Task Ownership
- Qualifications
    - SCORM Results
    - Set Qualification Dates (Manual)
    - Import Learning Records (Manual)
    - Capability Records (ASSESS - with Coaching Reports, Internal, External Form)

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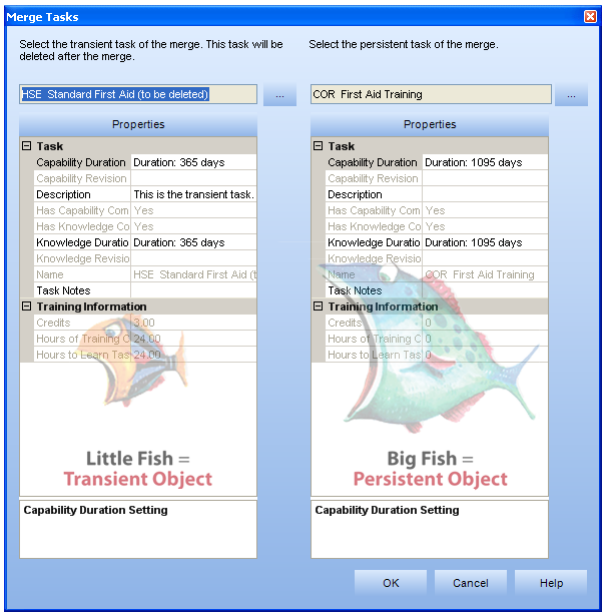
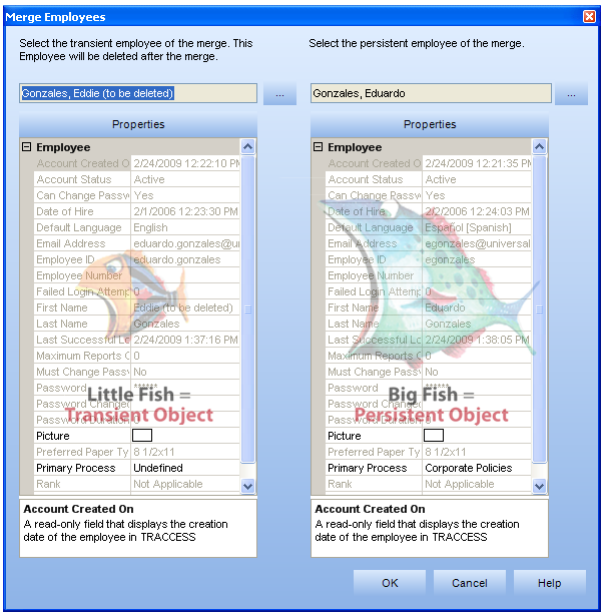
- Knowledge Assessment Completion - and Saved Assessments
- Scanned Attachments

The most important thing to consider when merging employees and tasks is, “Which object will remain, and which object will be deleted?” In order to answer this question, and in order to distinguish the difference between the two objects, a very simple scenario is introduced: Big Fish/ Little Fish. Which one wins? The answer is obvious – the big fish always wins. The big fish and little fish are then compared to objects in TRACCESS: a persistent object and a transient object.

This is some of the only functionality in the software that once done cannot be undone. You must be sure that you are picking the correct object to be the transient employee or task, and the correct object to be the persistent employee or task.

With the fish added as a watermark on the dialogs, the merge dialogs appear as follows:





The object on the left is always the transient object, the object on the right is the persistent object.

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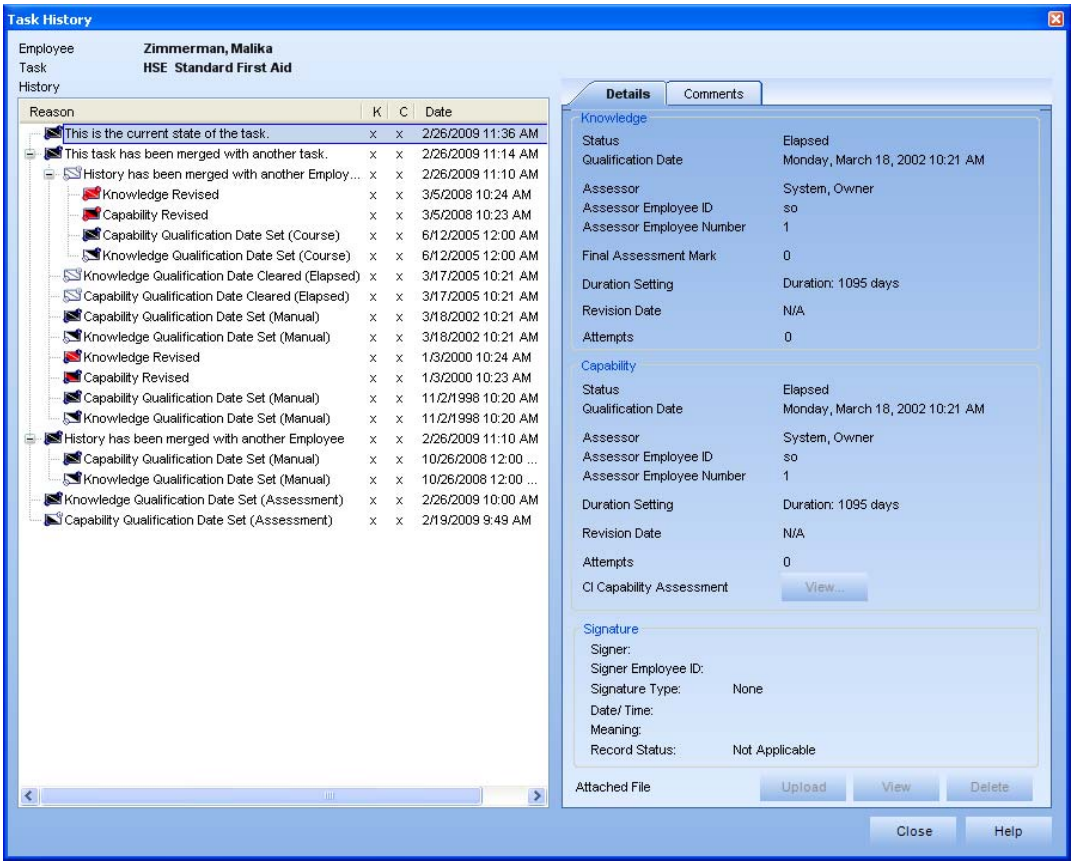

Task History Attachments

Have you ever wondered what to do with the endless stacks of paper that hold employees' records of training? Are you running out of storage space? Are you wondering how difficult it will be to supply an auditor with a record of training when it is being asked for?

TRACCESS CI (8.5) introduces the answer to all of these problems. For each qualification that TRACCESS records for a particular employee, on a particular task, the Operational Administrator or Supervisor can upload a scanned document that is the "proof" of that qualification. For example, with tasks that have a duration (as with most safety certificate tasks), employees will complete them over and over again. Whether completions are recorded by:

- a Learner taking the Knowledge Assessment
- a Learner completing a SCORM resource
- a Supervisor completing the Capability Assessment for a Learner
- a Supervisor manually setting qualification dates for the Learner
- a Supervisor importing learning records for the Learner
- a Supervisor setting course marks for the Learner

each of these setting/ clearing of completions can have a document associated with it. Following are some examples of how these documents would appear after being attached.

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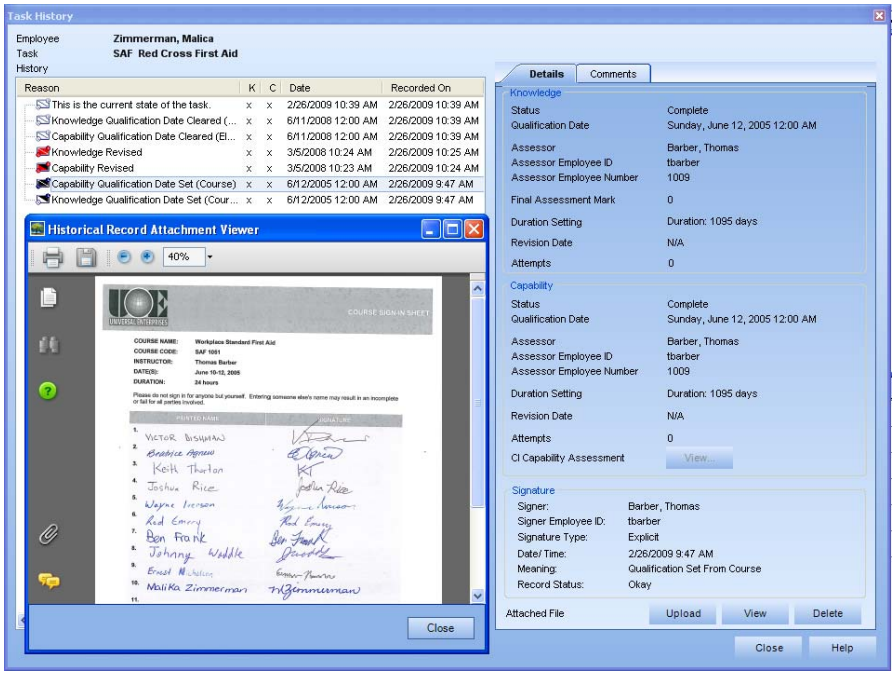
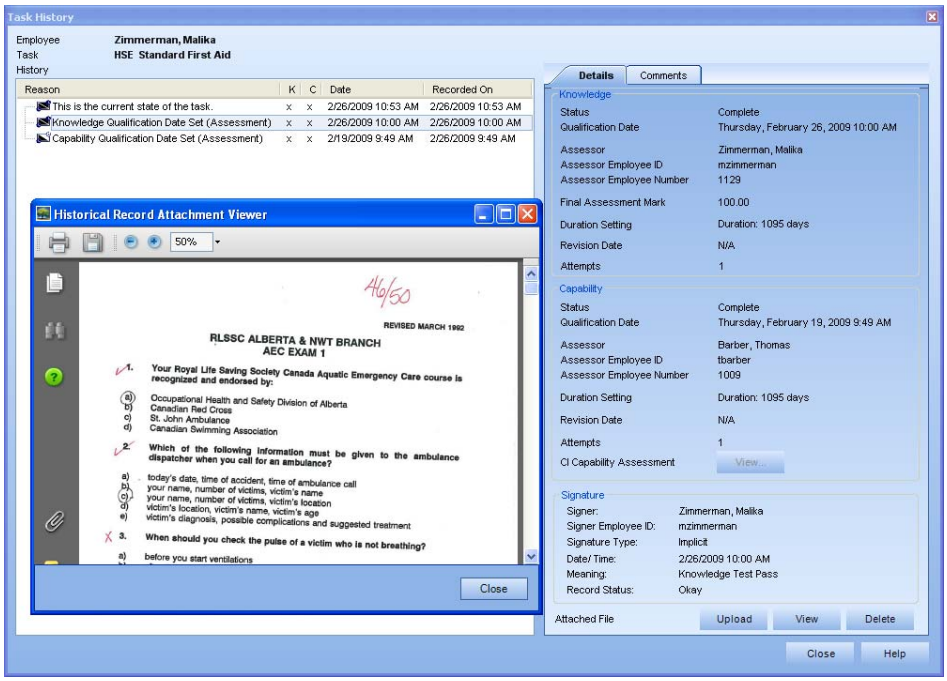
- Course Sign In Sheet



- Written knowledge assessment completed in a classroom setting



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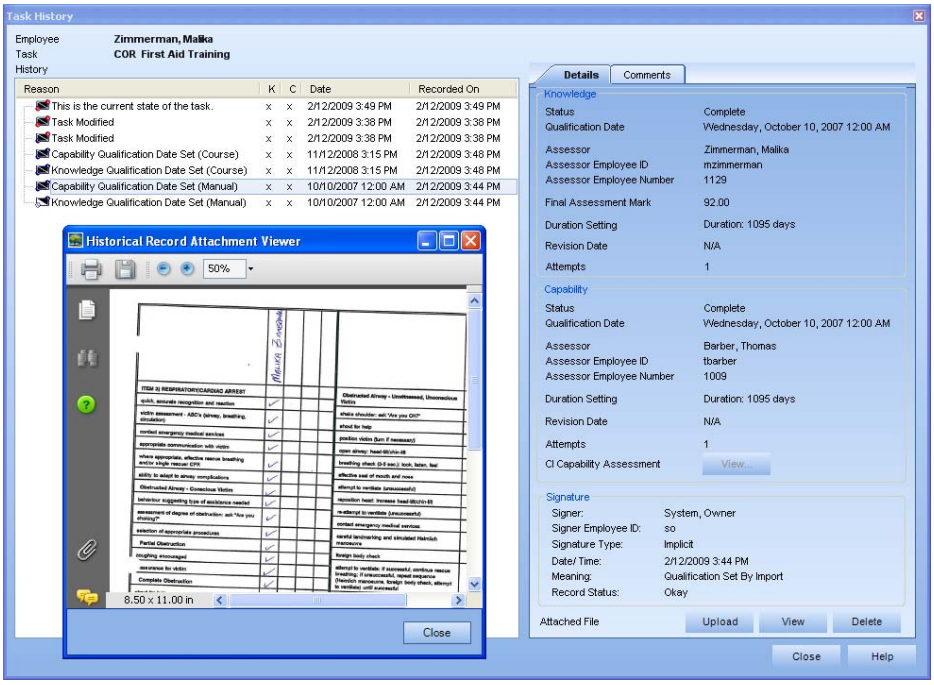
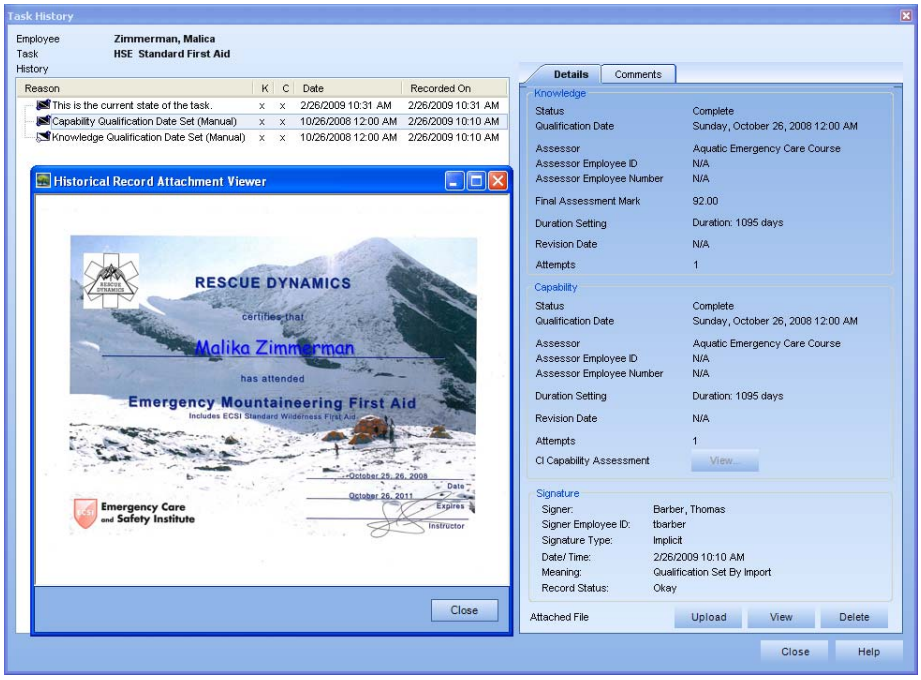
- Capability (Practical) sign off completed with your supervisor



- Certificate of completion, issued by an external source



Now you can have your completions, and the supporting documents to prove it, all in one location.

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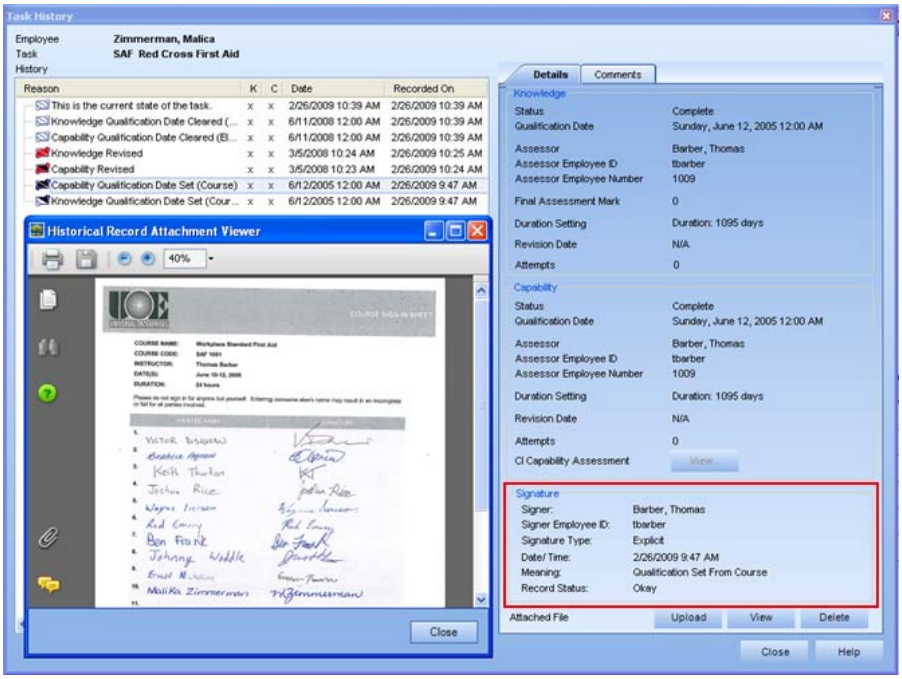
Electronic/ Digital Signature

An electronic or digital signature is essentially a computer's way of signing a person's name to something. A signature is legally binding, and short of being able to reproduce an actual signature within a computer, this is the technical way of accomplishing the same thing. Providing an electronic signature validates that a person exists in the database, using employee ID and password information. Therefore, when setting/ clearing completion statuses for employees within TRACCESS, an operational administrator or supervisor can be asked to provide the equivalent of their signature – or electronic signature.



The electronic signature information is displayed in the Task History dialog. This section of the dialog stores several pieces of information including:

- Signer – Name of employee that corresponds to the employee ID/ password provided
- Signer Employee ID
- Signature Type – This can either be Implicit or Explicit.
  - Implicit means that the right to complete the action was granted based on having successfully logged in to TRACCESS to begin with. For example, if a Learner successfully passes a final knowledge assessment, they will not be asked to provide their employee ID/ password again. This is an implicit right of a Learner – to complete knowledge assessments online.
  - Explicit means that the Operational Administrator/ Supervisor will be prompted when they attempt to set/ clear completion statuses for other learners. This applies to the following ways of setting/ clearing completions: setting qualification dates, completing capability assessments, setting course marks.

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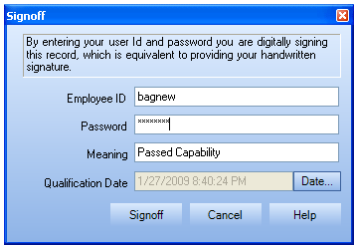

- Date/ Time
- Meaning – the database contains several prepopulated ways that a completion can be set/ cleared. If the Signature Type is implicit, the prepopulated string will appear in this area. For example, when a Learner completes a knowledge assessment online, the meaning field will show "Knowledge assessment passed". If the signature type is explicit, a prepopulated string will appear in the meaning field, but the Operational Administrator/ Supervisor has the right to change this text as desired.
- Record Status – this field is an added level of security against database tampering. There is no way that this status will read anything but "Okay" if all database activity is through TRACCESS. However, if someone attempts to manually modify the information in the database tables, the field will be flagged as compromised, and the Record Status field will display "Tampered".

Supervisor Right Restrictions

In versions prior to 8.5, Supervisors had access to certain functionality that may not have been desired. In particular, these include:

- Being able to set their own learning as complete
- Having access to all of a Learner's Processes, regardless of where the Process was assigned.

The first point occurs in the case where a Supervisor is responsible to learn the same materials as they are assigned to manage. If an employee was a Learner and a Supervisor in the same Organization Unit, they were able to sign themselves off. Now, if a Supervisor logs in, and selects themselves to sign off, a screen similar to the following is displayed.

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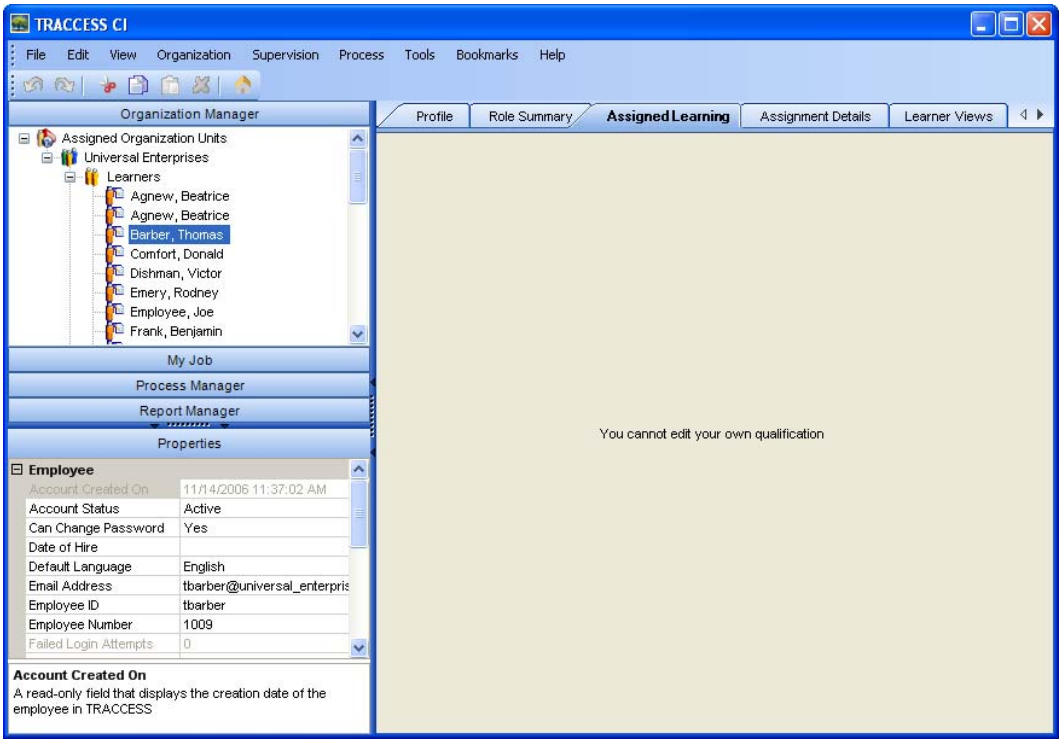
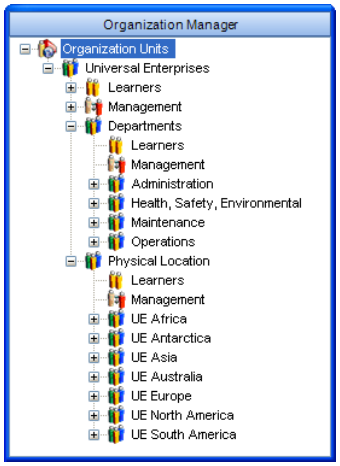


In the second case, there are some organizations that are structured in such a way that a Supervisor is not qualified to sign off on all of the processes that a Learner sees. In this case, if learning is assigned from a different "branch" than where the supervisor is assigned, the application can be set to either supervise (or not supervise) this other learning.

The following is a screen capture of a possible simple organization structure.



If the Supervisor is assigned to manage a branch within Operations, and the Learner acquires learning from both Operations and Health, Safety, Environmental, the Supervisor may not get to manage the Learner's HSE learning (depending on how his rights have been set).

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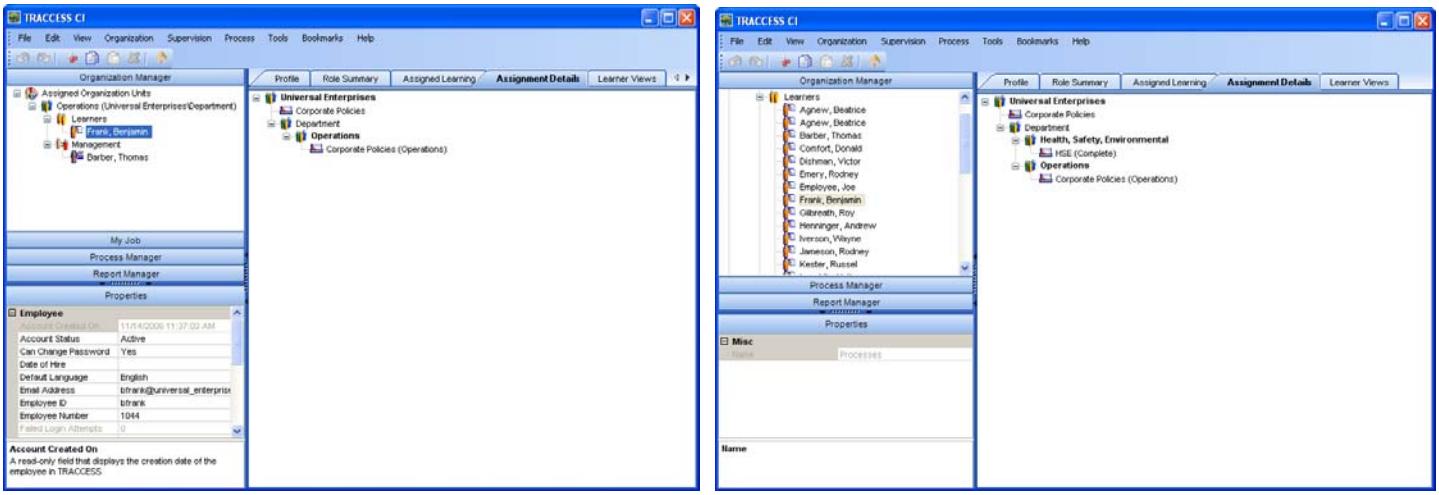
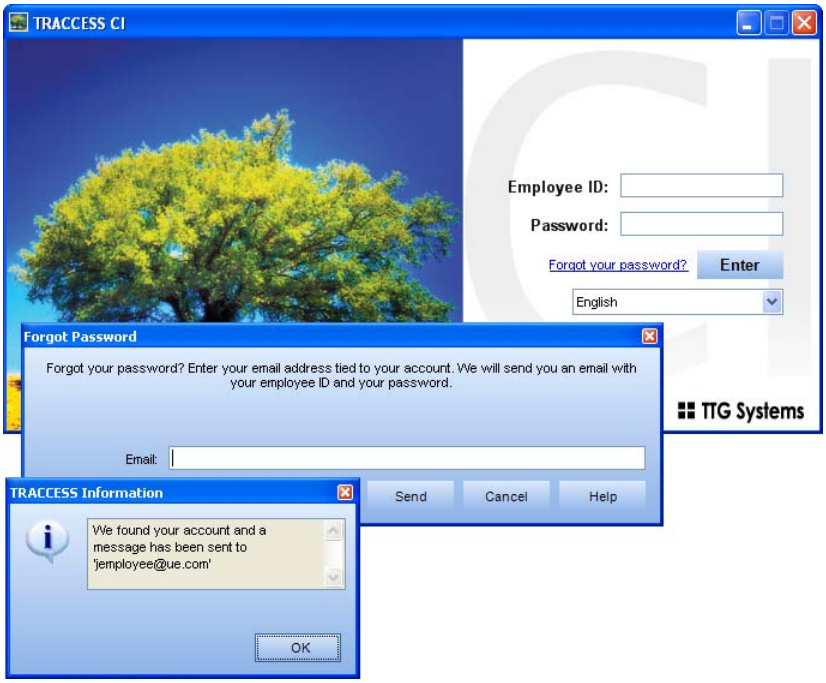


In the above example, the Supervisor's view is on the left, and the System Owner's view is on the right. The Supervisor is not able to see the HSE (Complete) process because he is not assigned to manage the Health, Safety, Environmental Organization Unit – that has been assigned this process.

Forgot Password

Have any of your learners ever lost their password? We know that this happens from time to time, and who ends up getting the phone call? The devoted TRACCESS Administrators are the lucky recipients of those phone calls or emails, and although we hate to take this joyous task away from them, TRACCESS CI (8.5) introduces a "Lost Password" functionality. This functionality works in conjunction with your employee email addresses – if some of your employees do not have emails set in their profiles, this will not work for them.

If a Learner clicks on the TRACCESS icon, but cannot remember their password, a prompt is presented right on the login screen.



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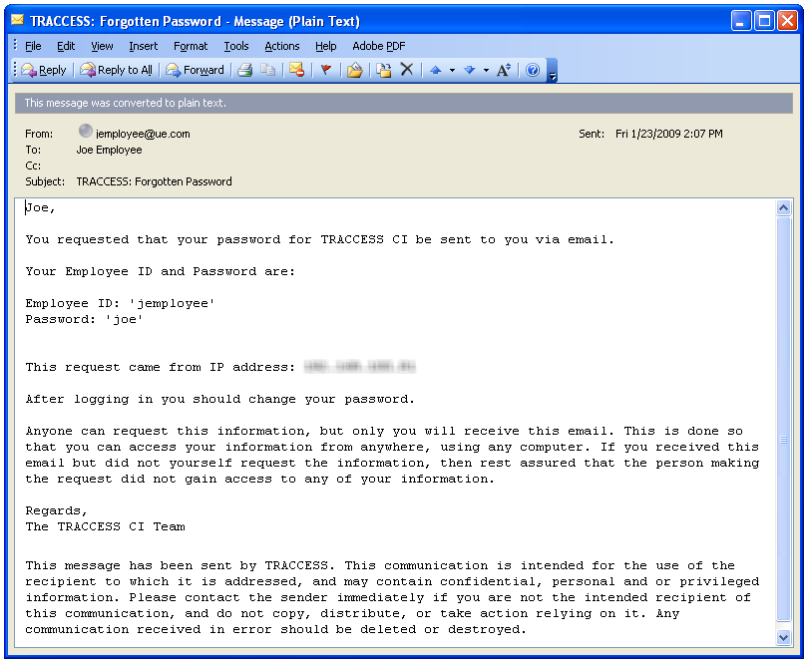
Clicking on the Forgot your password? link will display a dialog requesting your email address. A message similar to the following will appear in your email inbox.



If your configuration happens to have a supervisor email address for several learners who do not have email addresses themselves, entering the supervisor's email address into the dialog will send a message to the supervisor with all of the employee profiles that contain this email address.

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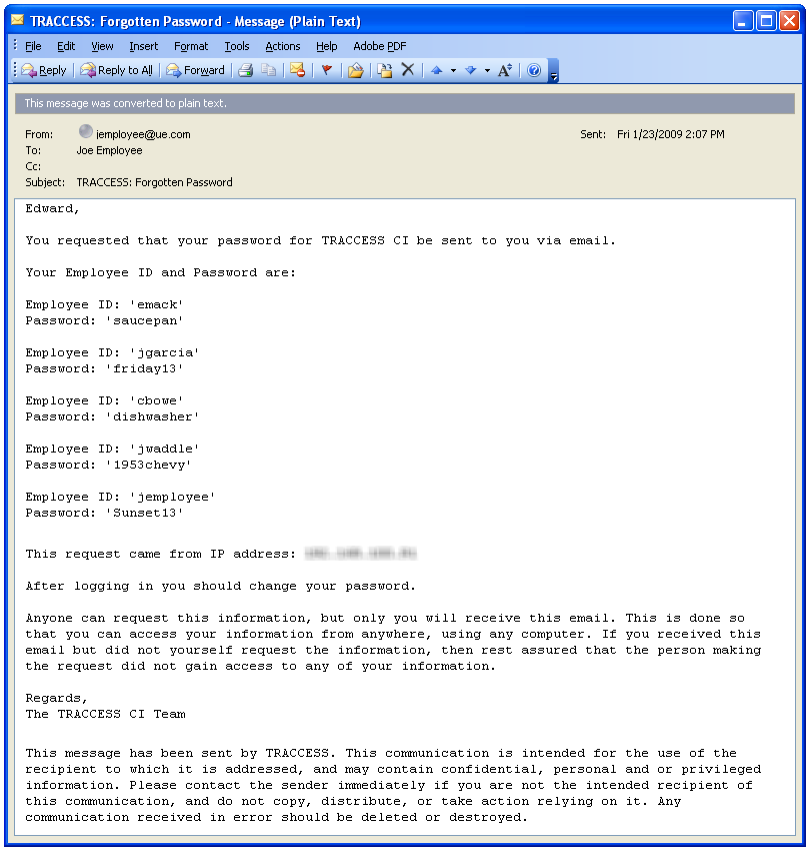

In this case, it would be the Supervisor's responsibility to find out which one of his learner's requested the password to begin with. Generally, it is the person whose first name is addressed in the top of the message text. In the above example, Edward Mack (emack) was the employee who made the password request.

Custom Learning Records Import

When importing employee profile information, the import format is extremely forgiving and flexible. However, when importing learning record information, the import format was extremely rigid and unforgiving. If the columns were not in the proper order, or there were too many or too few columns, the import would not work properly. This has been amended slightly, to allow custom Employee Task properties (as well as two integrated properties) to be imported at the same time as a learning record import.

The format of the import document for the first 15 columns must remain static, as before. However, now you are able to add extra columns (after the Comments column) that can either represent a custom Employee Task field, or the following integrated fields:

- Priority – high/ normal
- Number of Extra Final Assessment Retries – integer value

In the case of the above two fields, you must enter the text exactly as it appears in the Properties of the application. If you have decided to change the name of either of these fields to something else, whatever it has been changed to must appear as the header in the import file. These fields also contain information that is separate from the setting of qualification dates, and therefore these are two cases where you are not required to enter a date in either the Knowledge Qualification Date or Capability Qualification Date fields.

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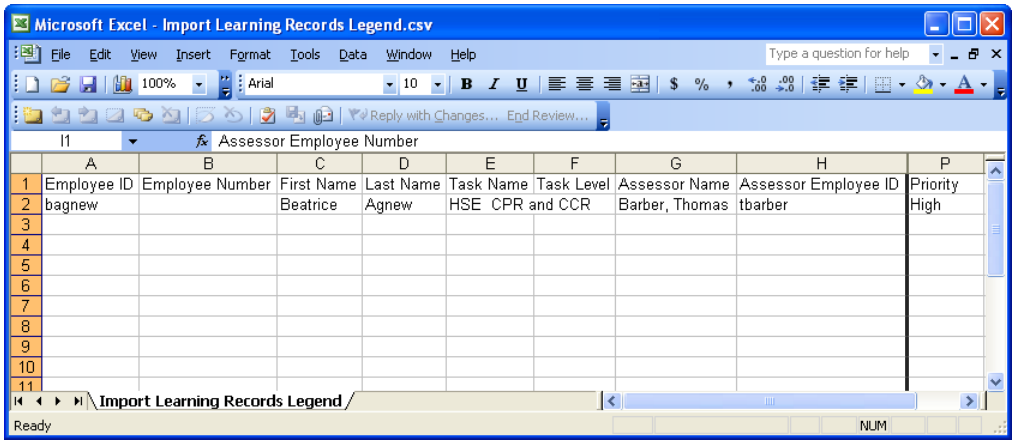


	A	B	C	D	E	F	G	H	P
1	Employee ID	Employee Number	First Name	Last Name	Task Name	Task Level	Assessor Name	Assessor Employee ID	Priority
2	bagnew		Beatrice	Agnew	HSE CPR and CCR		Barber, Thomas	tbarber	High
3									
4									
5									
6									
7									
8									
9									
10									
11									

In the above screen capture, the HSE CPR and CCR task for Beatrice Agnew is being set to High priority. Although the Knowledge and Capability fields are not shown on the graphic, they still exist in the import document. This is the only information required to be entered to set tasks to high priority for learners using the import functionality. The same is true of giving employees extra final assessment retries.

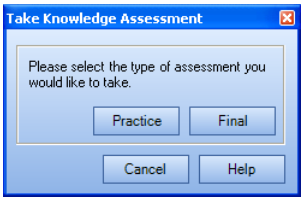
An example of a custom Employee Task property that you may wish to update using the Import Learning Records spreadsheet is a Capability Mark. In TRACCESS, capability is either complete or incomplete. However, after hearing feedback from clients that they require a capability mark, a solution may be to add a custom Employee Task property of Capability Mark. You could then add a column to your import spreadsheet with the name Capability Mark.

Please note: In this example, Capability Mark is being added as a custom property and is therefore not linked to a particular date. As with other custom properties, you can only save a single state of this mark. The last mark that was entered into the database is the only record saved. It cannot be associated with a particular capability completion.

Use of SCORM Modules

Two things have changed in the use of SCORM modules. One is essentially visual, while the other is functional.

When accessing a Knowledge Assessment, the first dialog that you see after clicking on the Task Knowledge Assessment button asks you to select between a Practice and Final Assessment.



In an attempt to create consistency within the application, (and to save the space of an extra button), the way that you access a SCORM module has changed.

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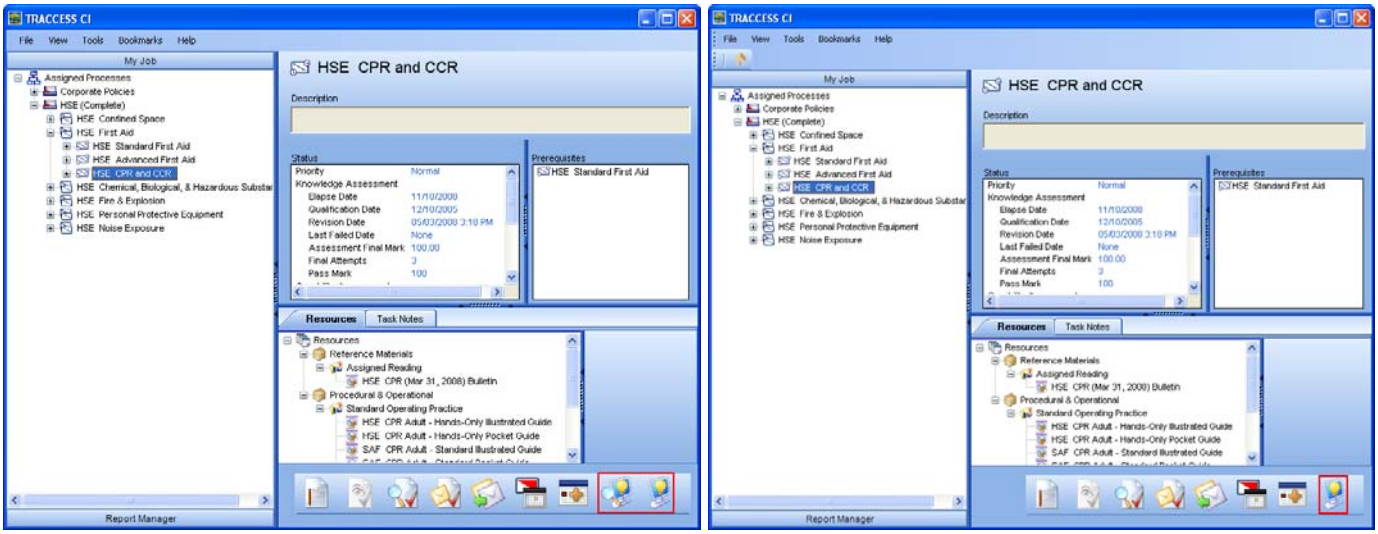
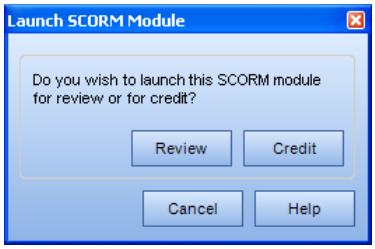


The capture on the left is how a SCORM module would appear in versions prior to 8.5. The capture on the right is how a SCORM module appears in version 8.5. Clicking on the button displays a dialog similar to the Take Knowledge Assessment dialog, allowing you to decide between opening the module as a resource for review, or as a knowledge assessment for credit.



The second difference in the use of SCORM modules is how they can be attached, and subsequently accessed. Since the SCORM button always appears as the last button at the bottom of your screen, clients have told us that their employees often do not see the button, or get confused by which method they should use to pass their tests – using the Knowledge Assessment button or the SCORM button.

To alleviate this, a SCORM module can now be attached as the Knowledge Assessment. In this way, the Learner simply has to click the button – whether they are accessing an internal TRACCESS Knowledge Assessment, an external ASSESS Knowledge Assessment, or now an external SCORM module.

Simplifying the Knowledge Assessment Question Import

Prior to version 8.5, the internal Knowledge Assessment Question import for TRACCESS CI was not only intentionally omitted from any training session, it was officially discouraged to attempt to create your own file from scratch. This was because the Question Text field contained a long string of rich text mark up code, that if omitted or modified, would prevent the import from working properly. The import format now makes the rich text mark up language optional. In other words, if the long string is included correctly, the import will work. If the long string is omitted, the import will work.

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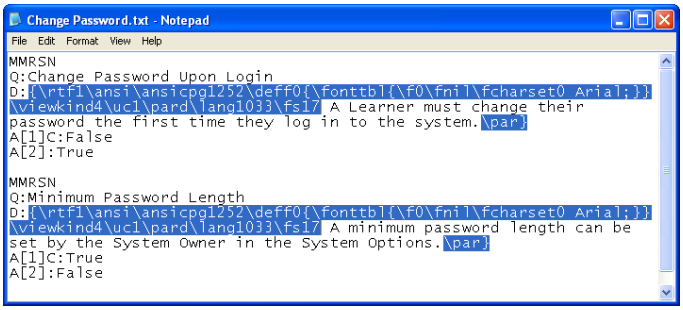
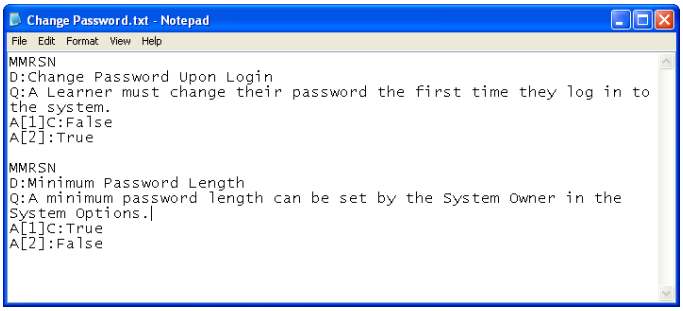
The following captures show the acceptable import formats in 8.5.

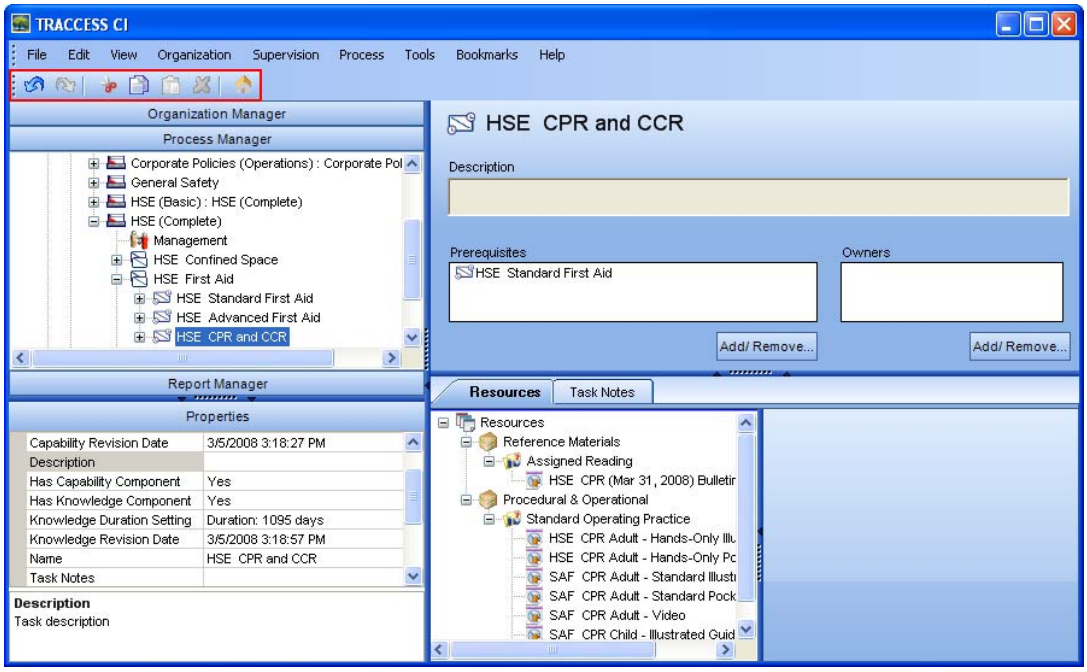




The highlighted text is no longer required for the import to succeed. Also, an error in the prior versions of TRACCESS CI import had the Description text labeled as Q, and the Question Text labeled as D. If you are having difficulties importing files questions, whose import files were created prior to 8.5, you may need to change the Qs and Ds where required.

Custom Toolbar

Version 8.5 introduces two new toolbars: a global toolbar (where the system owner can place commonly used functions), and a personal toolbar (where each learner can decide which functions he/ she uses most frequently. Therefore, not only does this version introduce a TRACCESS Today button, but a way to create shortcuts to frequently used TRACCESS functions, and also a way to access external sites, applications, etc. For Subject Matter Experts who complete their modeling within an Excel spreadsheet, they may wish to create a link to this spreadsheet. For Operators who use conversion utilities to complete their jobs, they may wish to create a link to this application.



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