

What's New in TRACCESS CI (8.4)?

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## What's New in TRACCESS CI (8.4)

The TRACCESS CI development team is continually 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, we may be contracted to create custom reports to meet your needs. Please contact PetroSkills <u>support@petroskills.com</u> 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.

### **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.

Edit Activity by Weekday		X
Use this page to custor	nize how the report type appears in the TRACCESS Client Application.	
Name	Activity by Weekday	<b>~</b>
Available For Roles	□ Learner ♥ Operational Administrator ♥ Reporter Subject Matter Expert ♥ Supervisor	
	Next > Cancel He	lp

**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.

Edi	t Activity by Weel	:day			×
	Use this page to D	efine, Edit or Dele	te layout definitions	ns.	
	Layouts				1
	Language	Layout Name	Paper Type		
	English	Bar Graph	8 1/2x11		
	English	Line Graph	8 1/2x11		
	English	Bar Graph	A4		
	English	Line Graph	A4		
				F	
				Add Edit Delete	J
			< Prev	evious Next > Cancel Help	

#### 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		×
Language	English	
Paper Type	81/2x11	
Name	Bar Graph	
Layout File	ActivityByWeekday Save	
Connect Information	Connect to TRACCESS Main Database	~
	Use Settings in Crystal Report File Connect to TRACCESS Main Database	
	Connect to TRACCESS Main Database Connect to TRACCESS Data Warehouse Database Specify Connect Information	
	Password	
	Database	
Notes		
	OK Cancel Help	3

#### 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.

ate Report		
Title	Activity by Weekday	
Subtitle		
Description		
	Bar Graph (8 1/2 x 11)	
	Bar Graph (8 1/2 x 11)	
	Line Graph (8 1/2 × 11)	
	Bar Graph (A4)	
	Line Graph (A4)	

Generate Report dialog

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

Report - TR	NACCESS CI	
d 3	H 4 ▶ H 1 / 1 🕅 100% - Busi	ness Objects
Cor	Activity by Weekday	<u> </u> TRACCESS CI
	Activity By Weekday	
	120	
	100	
Ţ	80	Monday
Activity Count	60	₩ Tuesday ₩ Wednesday ₩ Thursday
Activ	40	🚩 Friday 🖉 Sunday
	20	
	Monday Tuesday Wednesday Thursday Friday	Sunday
		Close Help
		Close Help

Custom Report – Using Main TRACCESS Tables

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.



Edit Report Layout	
Language	English
Paper Type	81/2x11
Name	Letter
Layout File	DWH - Employee-Learning Assignment Bar Graph Save
Connect Information	Connect to TRACCESS Data Warehouse Database
	Use Settings in Crystal Report File Connect to TRACCESS Main Database Connect to TRACCESS Data Warehouse Database Specify Connect Information
	Password
	Database
Notes	
	OK Cancel Help

**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 dependent 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.

Ed	it Employ	yee/ Learning As:	signment			×		
	Use this	s page to pass pa	rameters to the atta	ched Crystal Report.				
١.								
	Use	Parameter Name		Parameter Data Type				
		SystemTitle		String				
		CurrentLanguage		Number				
		ProjectID		String				
	<b>v</b>	OrgMgrLearners		Multivalue Number				
		OrgMgrOrgUnits		Multivalue Number				
		AssignedLearning		Multivalue Number				
		OrgMgrOrgUnitLea	rnerPair	Multivalue String				
		SelectedFilters		Multivalue String				
					×			
				< Previous Next >	Cancel Help			

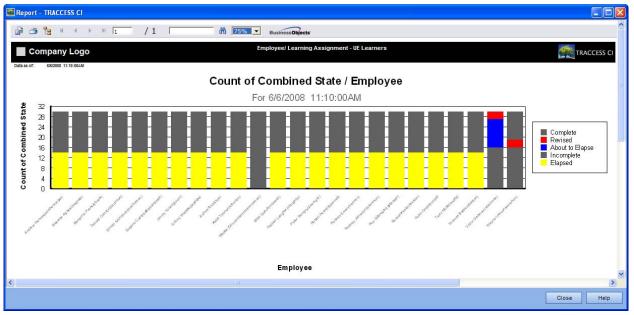
**Enabling Selection of Particular Organization Unit Learners** 

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.

New Employee/ Lea	rning Assignment Report Template
New Employee/ Lea	Image: Assignment Report Template       Select Report Organization Units.       Image: Organization Units.   <
	<pre></pre>

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 14 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.

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).

9		Insert Forma	t <u>T</u> ools <u>D</u> ata	Window Help Adobe PDF Type a ques	tion for help 🚽 🗕 🗗 🕽
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	A2 🔻	<b>∱</b> ≈ 1001			
	A	В	C	D	E
1	EmployeeNumber	FirstName	LastName	EmailAddress	Location
2	1001	Beatrice	Agnew	bagnew@universal_enterprises.com	Edmonton
3	1009	Thomas	Barber	tbarber@universal_enterprises.com	Edmonton
4	1044	Benjamin	Frank	bfrank@universal_enterprises.com	Calgary
5	1068	Nathan	Laughlin	nlaughlin@universal_enterprises.com	Red Deer
6	1094	Joshua	Rice		Seattle
7	1035	Victor	Dishman	vdishman@universal_enterprises.com	Seattle
8	1129	Malika	Zimmerman	mzimmerman@ue.com	Vancouver
9	1086	Ernest	Nicholson		New York
10	1116	Keith	Thorton		New York
11	1029	Donald	Comfort	dcomfort@universal_enterprises.com	Edmonton
12					
13					

**External Data Source** 

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



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1	VacationID						_1
2	1	1001	08-May-08	30-May-08			
3	2	1035	07-May-08	13-May-08			
4	3	1129	18-Jun-08	25-Jun-08			
5	4	1086	12-Feb-08	26-Feb-08			
6	5	1094	13-Feb-08	15-Feb-08			
7	6	1009	13-Aug-08	27-Aug-08			
8	7	1009	15-Oct-08	21-Oct-08			
9	8	1001	17-Sep-08	18-Sep-08			
10	9	1001	30-Sep-08	01-Oct-08			
11	10	1068	06-May-08	29-May-08			
12	11	1094	07-May-08	07-May-08			
13	12	1035	28-May-08	30-May-08			
14	13	1035	20-Aug-08	01-Sep-08			
15	14	1029	29-Aug-08	09-Sep-08			
16	15	1029	24-Oct-08	28-Oct-08			
17	16	1129	27-Oct-08	29-Oct-08			
18	17	1044	13-May-08	21-May-08			
19	18	1086	07-May-08	20-May-08			
20	19	1116	16-Oct-08	28-Oct-08			
21	20	1086	09-Oct-08	15-Oct-08			_
22	21	1035	01-Oct-08	03-Oct-08			
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#### **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.

Edit Report Layout				X
Language	English			
Paper Type	8 1 <i>1</i> 2×11			
Name	Letter			
Layout File	VacationReport_Excel			Save
Connect Information	Specify Connect Inforr Password	l Report File 5 Main Database 5 Data Warehouse Database		V
Notes	Database		ок	Cancel Help

**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.



Edit Employee - Vacation Listing			X
Set Miscellaneous Options			
✓ Use Report Filters Helio Link			
Include implied child Org. Unit selections in parame	ter to Report.		
Please select property to pass as LearnerID parameter	to report	Employee Number	~
Please select property to pass as OrgUnit parameter to	o report	Employee Number Email Address Employee ID	
Please select property to pass as AssignedLearning p	arameter to report	Enipioyee iD ID	
	< Previous Fi	nish Cancel	Help

Specify Match Validation between TRACCESS and External Data Source



A sample custom hybrid report may look like this:

	1	/4 043 •43 •			Busin
Company I	Logo		Vacation Listings For Selected Areas		
Edmonton					
Employee Number	First Name	Last Name	Vacation Start	Vacation End	
1001	Beatrice	Agnew	08-May-08	30-May-08	
1009	Thomas	Barber	13-Aug-08	27-Aug-08	
1029	Donald	Comfort	29-Aug-08	09-Sep-08	
1001	Beatrice	Agnew	17-Sep-08	18-Sep-08	
1001	Beatrice	Agnew	30-Sep-08	01-Oct-08	
1009	Thomas	Barber	15-Oct-08	21-Oct-08	
1029	Donald	Comfort	24-Oct-08	28-Oct-08	
		Total Page No.: 4	Ш.	Zoom Factor: 100%	

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:

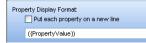
Property Display Format:	
{PropertyName}: {PropertyValue}	Ex. {PropertyName}: {PropertyValue}

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:



Report - TRACCESS CI		
🔐 🍊 🧞 к 🗸 🕨	₩ 1	/ 33
Company Lo	ogo	Qualific
	_	
	Knowledge	% of Total Assignment
Complete	5	3.0%
About to Elapse	10	6.0%
Incomplete	7	4.2%
Elapsed	140	83.3%
Revised	6	3.6%
Total Assignments	168	100.0%
Universal Enterprises Agnew, Beatrice Email Address: bagnew@ Employee UD: bagnew@ Employee UD: bagnew Employee Vomber. 1001		
Universal Enterprises\UE C		-
(HSE) Confined Space		,
Universal Enterprises\U		asic)\First Aid
(HSE) Standard First /	Aid	
(HSE) CPR		

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.

		( 20	
🕼 🍊 🏪 К. К	▶ H 1	/ 30	
Company	Logo	Qualificatio	on -
	Knowledge	% of Total Assignments	
Complete	5	3.0%	
About to Elapse	10	6.0%	
Incomplete	7	4.2%	
Elapsed	140	83.3%	
Revised	6	3.6%	
Total Assignments	168	100.0%	
Jniversal Enterprises			
Agnew, Beatrice (Ser Universal Enterprises	ior Fire Fighter) UE Corporate\HSE (Basic	2)	
Universal Enterpri	ses\UE Corporate\HSE (B	asic)\Confined Space	
(HSE) Confined	Space Awareness		

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.



Report - TRACCI	SS CI				
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Compa	iny	Lo	jo		
			Kr	owledge	
Complete				5	
About to Elapse				10	
Incomplete				7	
Elapsed				140	
Revised				6	
Total Assignments				168	
Universal Enterpris Agnew, Beatrice Universal Enterp	-Senio				2

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

Google G-	✓ ↓ ※ ③ Settings · ④ ·
File Format	Crystal Reports (RPT)
	Crystal Reports (RPT) Adobe Acrobat (PDF) Microsoft Excel 97-2000 (XLS)
Page Range:	Microsoft Excel 97-2000 - Data Only (XLS) Microsoft Word (RTF) Microsoft Word Editable (RTF) Rich Text Format (RTF)
	Pages: From: 1 To: 1
	OK Cancel

The resultant export will look like this:

	licrosof	t Excel -	HSE (Ba	asic) - U	niversal	Enterp	rises Lea	arners			×
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5	Agnew,	1/1/2004	E	2/13/200	С	2/13/20		Incomp	lete		
6	Barber,	9/10/200	A	9/10/200	A	9/10/20	9/9/2008	Comple	ete		
7	Campb	9/1/2004	E	10/8/200	E	10/8/20		Incomp			
8	Comfor	10/12/20	A	11/18/20	A	11/18/2	10/11/20	Comple	te		
9	Dishma	9/12/200	A	10/10/20	A	10/10/2	9/11/200	Comple	ete		
10		9/13/200		10/8/200	E	10/8/20		Incomp	lete		
11		9/13/200		11/18/20		9/13/20		Incomp			
12	Gilbreat	9/16/200	A	9/10/200	A	9/16/20	9/9/2008	Comple	ete		
		3/24/200		4/1/2003	E	4/1/2003		Incomp	lete		
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H 4	• H \	Sheet1	/			<	)			>	
Read	ły							N	IUM		

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.



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	Date		Status		Status		Text to Colum	ns							
		Confined Beatrice			s 2/13/20(	17	PivotTable and	d PivotCl	hart Report	-					+
		Thomas			9/10/200		Import Extern	ial <u>D</u> ata		•					+
		ell, Euge			10/8/200		List								+
		t Donald			11/18/20										1
9	Dishma	n, Victor	9/12/20	A	10/10/20		XML			•					t
10	Emery	Rodney	9/13/20	E	10/8/200	2	<u>R</u> efresh Data								Ť
		Benjamir			11/18/20			*							1
		th, Roy~I			9/10/200				Complete						
		ger, Andr			4/1/2003		4/1/2001		Incomplete						4
		, Wayne∽			2/12/200				l'Complete						4
		on, Rodne			11/18/20		11/18/20		Incomplete						+
		, Russel~ r., Nathar			10/8/200		11/18/20		Incomplete Incomplete						+
		Terry∼Pro			9/10/200				Complete						+
		on, Erne			10/8/200		10/2/200		Incomplete						+
		Rvan~Pr			9/10/200	-			Complete						+
		Robert~			9/10/200				Complete						t
		Mike~Fi			9/10/200		10/3/200		Incomplete						Ť
23		oshua∼P			9/10/200	A	9/10/20(	9/9/200	Complete						1
		Peter~		А	9/10/20(	A			Complete						~
H 4		Sheet1	/					•	ш.,					>	U.
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Your property value will be moved to the adjacent field, and can then be used as a sort field in Excel.

	Aicrosoft Excel - HSE (Basic) - Univ	ersal Enterprises Learners										
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	Agnew, Beatrice	Senior Fire Fighter	1/1/200	F	2/13/20	C	2/13/20	(				
6	Barber, Thomas	Probationary Fire Fighter	9/10/20		9/10/20		9/10/20					
7	Campbell, Eugene	Senior Fire Fighter	9/1/200		10/8/20		10/8/20					
8	Comfort, Donald	Fire Fighter	10/12/2		11/18/2		11/18/2					
9	Dishman, Victor	Fire Fighter	9/12/20	A	10/10/2	A	10/10/2	(9/				
10	Emery, Rodney	Fire Fighter	9/13/20	E	10/8/20	E	10/8/20	(				
11	Frank, Benjamin	Fire Fighter	9/13/20	A	11/18/2	E	9/13/20	(				
12	Gilbreath, Roy	Probationary Fire Fighter	9/16/20	A	9/10/20	A	9/16/20	(9/				
13	Henninger, Andrew	Fire Fighter	3/24/20	E	4/1/2003	E	4/1/200	(				
14	lverson, Wayne	Senior Fire Fighter	1/31/20	С	2/12/20	С	2/12/20	(1/				
15	Jameson, Rodney	Fire Fighter	2/28/20	E	11/18/2	E	11/18/2	(				
16	Kester, Russel	Fire Fighter	9/29/20	E	10/8/20	E	10/8/20	(				
17	Laughlin, Nathan	Probationary Fire Fighter	3/12/20	E	11/18/2	A	11/18/2	(				
	Moffit, Terry	Probationary Fire Fighter	10/2/20		9/10/20		10/2/20					
	Nicholson, Ernest	Senior Fire Fighter	10/8/20		10/8/20		10/8/20					
	Oneill, Ryan	Probationary Fire Fighter	9/10/20		9/10/20		9/10/20					
	Pernell, Robert	Probationary Fire Fighter	9/10/20		9/10/20		9/10/20					
	Quach, Mike	Fire Fighter	10/3/20	-	9/10/20	-	10/3/20					
	Rice, Joshua	Probationary Fire Fighter	9/10/20		9/10/20		9/10/20					
	Seviany Peter	Prohationary Fire Fighter	9/10/20	A	9/10/201	A	9/10/20	(9/ 🞽				
r			)				_	20				
Read	dy					NUM						

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.



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A1 🔻 🏂 Task Na					
A	В	C	D	E	F
Task Name	Employee Name	Rank	Task Date		Overall Status
(HSE) Confined Space Awarenes:		Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
(HSE) Confined Space Awareness		Fire Fighter		10/11/2008	Complete
(HSE) Confined Space Awarenes:		Fire Fighter	10/10/2005		Complete
(HSE) Confined Space Awarenes:		Probationary Fire Fighter	9/16/2005	9/9/2008	Complete
(HSE) Confined Space Awarenes:		Senior Fire Fighter	2/12/2007	1/30/2010	Complete
(HSE) Confined Space Awarenes:		Probationary Fire Fighter	10/2/2005	9/9/2008	Complete
(HSE) Confined Space Awarenes:		Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
(HSE) Confined Space Awareness	Pernell, Robert	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
) (HSE) Confined Space Awarenes:	Rice, Joshua	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
(HSE) Confined Space Awarenes:	Sevigny, Peter	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
2 (HSE) Confined Space Awareness	Waddle, Johnny	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
(HSE) Confined Space Awareness	Yount, Jimmy	Probationary Fire Fighter	9/10/2005	9/9/2008	Complete
4 (HSE) Confined Space Awareness	Agnew, Beatrice	Senior Fire Fighter	2/13/2008		Incomplete
(HSE) Confined Space Awareness	Campbell, Eugene	Senior Fire Fighter	10/8/2004		Incomplete
(HSE) Confined Space Awareness	Emery, Rodney	Fire Fighter	10/8/2004		Incomplete
(HSE) Confined Space Awareness	Frank, Benjamin	Fire Fighter	9/13/2005		Incomplete
(HSE) Confined Space Awareness	Henninger, Andrew	Fire Fighter	4/1/2003		Incomplete
(HSE) Confined Space Awareness		Fire Fighter	11/18/2004		Incomplete
(HSE) Confined Space Awareness	Kester, Russel	Fire Fighter	10/8/2004		Incomplete
(HSE) Confined Space Awareness		Probationary Fire Fighter	11/18/2005		Incomplete
2 (HSE) Confined Space Awareness		Senior Fire Fighter	10/8/2004		Incomplete
(HSE) Confined Space Awareness	Quach, Mike	Fire Fighter	10/3/2004		Incomplete
(HSE) Confined Space Awareness		Senior Fire Fighter	10/8/2004		Incomplete
(HSE) Confined Space Awareness		Probationary Fire Fighter			Incomplete
↓ ▶ N Sheet1 /		<			>

## 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
- Training Information

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

Employee

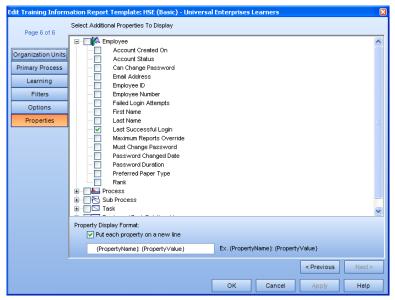


- Employee/ Task Relationship
- Process
- Sub Process
- Task
- Task with Levels

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

	ition Report Template: HSE Select Training Information Repo	(Basic) - Universal Enterprises Learn ort Filters	ers	2
Organization Units Primary Process Learning Filters Options Properties	Object Employee/Task Relationship Process Sub Process Task	Property Last Successful Login Knowledge Final Assessment Attempts Name Name Credits	Comparison Before Greater than Contains Contains Greater than	Value 1806/2008 11:58 AM 2 HSE HSE 0.25
	<ul> <li>✓ Match All</li> <li>✓ Match Any</li> </ul>	Show Filters In Report		Edit Delete Previous Next >

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



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.

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eport									
a.									
	Training Infor	mation - HSE (Bas	sic) - Unive	rsal Enterprise	slear	ners	allen.		
Company Logo		Using Many F			0 200.		TR	RACCESS C	l
		Oshig Many i	11010-010	Jidyod					
		Report Filters (Ma	atch any filte	r)					
Object	Property	Comparison	Value	/					_
Employee	Last Successful Login	Before	18/06/2	008 11:58 AM					
Employee/ Task Relationship	Knowledge Final Assessment Atte	Greater than	2						
Process	Name	Contains	HSE						
Sub Process	Name	Contains	HSE						
Task	Credits	Greater than	0.25						
		Sumi	nanz						
Total Credits	Total Credit Hours	Junn Total Learn Task Hours		Tasks Complete		TasksIncomplete	Co	mplete (%)	
0 / 28.5	0 / 228	0 / 228		0		12	00	0.0%	
		Organized b	y Employee						
		Knowledge	Capability	Trai	ningInfor	mation	Task	Status	
				Credits	Credit	Learn Task	Status	Completion	
					(hrs)	(hrs)			_
Agnew, Beatrice									
Last Successful Logir	n: 17/06/2008 11:03 PM								
UniversalEnterprises/UE Corporat	te HSE (Basic)								
UniversalEnterprises\UE Corpo	orate\HSE (Basic) (HSE) First Aid								
(HSE) Standard First Aid		10/12/2004	10/12/2004	3	24	24	E	Incomplete	
(HSE) CPR		10/12/2004	10/12/2004	1	8	8	E	Incomplete	
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## **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:

Edit Qualification Re	oort Template: Pegasus - North America	- Use CI 🔀
Page 4 of 4	Report On C Knowledge Only C Capability (	Dniv 🕞 Both
Organization Units Primary Process Learning Options	Status to Report       I Complete       I Complete       Organize By       Organize By       Organization Unit       Employee       Process       Task	nplete 🔽 Revised
	Forecast Date Use date for calculating results	Monday , September 11, 2006
	Change Report Start	Monday , September 11, 2006
	Report on levels between End	Monday , September 11, 2006 🗾
		< Previous Next >
	0	OK Cancel Apply Help

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.

Belk + PR	30	30 /}} /} -					Busir
s							
		Qualification	- HSE (Basic	:) - Universal Enter	prises Learners	The	
Company L	.ogo		Show Sum	maries - Prior to 8.4		-	
Process Summary - Un	iversal Enterprises	UE Corporate\HS	E (Basic) (Zimm)	erman, Malika)			
	Knowledge	<u>% of Total</u> Assignments	Capability	<u>% of Total</u> Assignments	<u>C</u>	ompletion Status	<u>% of Total</u> 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%
ncomplete	7	100.0%	7	100.0%	TotalAssignments	7	
Elapsed	0	0.0%	0	0.0%	Total Unique Employees	1	
Revised	0	0.0%	0	0.0%	Total Unique Tasks	7	
TotalAssignments	7	100.0%	7	100.0%			
Employee Summary - 2	Zimmerman, Malika	i.			1		
	Knowledge	<u>% of Total</u> Assignments	Capability	<u>% of Total</u> Assignments	Ci	ompletion Status	<u>% of Total</u> 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%
ncomplete	7	100.0%	7	100.0%	TotalAssignments	7	
Elapsed	0	0.0%	0	0.0%	Total Unique Employees	1	
Revised	0	0.0%	0	0.0%	TotalUnique Tasks	7	
TotalAssignments	7	100.0%	7	100.0%			
Organization Unit - Un	iversal Enterprises						
	Knowledge	<u>% of Total</u> <u>Assignments</u>	Capability	<u>% of Total</u> Assignments	<u>C</u>	ompletion Status	<u>% of Total</u> <u>Assignments</u>
Complete	20	11.9%	20	11.9%	Complete	60	35.7%
About to Elapse	45	26.8%	46	27.4%	Incomplete	108	64.3%
ncomplete	7	4.2%	7	4.2%	TotalAssignments	168	
Elapsed	70	41.7%	69	41.1%	Total Unique Employees	24	
Revised	26	15.5%	26	15.5%	Total Unique Tasks	7	
otalAssignments	168	100.0%	168	100.0%			

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

New Qualification Re	port Template			×
	Select Qualification Report op	tions.		
Page 5 of 6 Organization Units Primary Process Learning Filters	Report On Knowledge Only Status to Report Complete About to Elapse Organize By	<ul> <li>Capability Only</li> <li>✓ Incomplete</li> <li>✓ Elapsed</li> </ul>	Revised Summaries	Both
Options	<ul> <li>Organize By</li> <li>Organization Unit</li> </ul>		Employee	Organization Unit
Properties	<ul> <li>Employee</li> </ul>		Process	Task
	O Process		Show Summaries C	
	○ Task		Show Cascadeu S	annianes
	Forecast Date	g results		Date
	Change Report	Start		Date
	Report on Changes Between	End		Date
				< Previous Next >
			OK Cancel	Apply Help

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

t							
Company	Logo			) - Universal Ent ary Deselected - (	erprises Learners CI (8.4)		TRACCES
niversal Enterprises							
Employee Summary	Zimmerman, Malik <u>Knowledge</u>	a <u>% of Total</u> <u>Assignments</u>	<u>Capability</u>	% of Total Assignments	Com	pletion 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%	TotalAssignments	7	
Elapsed	0	0.0%	0	0.0%	Total Unique Employees	1	
Revised	0	0.0%	0	0.0%	TotalUnique Tasks	7	
TotalAssignments	7	100.0%	7	100.0%			
Organization Unit - U	niversal Enterprises				22 <sup>-</sup>		
	Knowledge	<u>% of Total</u> <u>Assignments</u>	<u>Capability</u>	<u>% of Total</u> Assignments	Com	pletion Status	<u>% of Total</u> 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%	TotalAssignments	168	
Elapsed	70	41.7%	69	41.1%	Total Unique Employees	24	
Revised	26	15.5%	26	15.5%	TotalUnique Tasks	7	
TotalAssignments	168	100.0%	168	100.0%			
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