



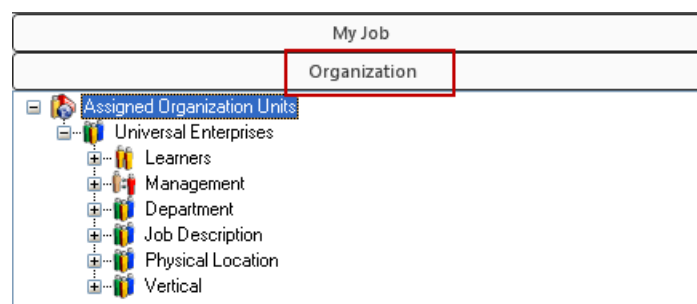
Manage Org Units, Employees, and Learning

In TRACCESS CI, the Operational Administrator creates and maintains Organization Units, populates Org Units with employees (both Learners and Management), and assigns learning to Org Units and to Learners. This Quick Reference Guide reviews several of the system functions the Operational Administrator uses:

- Create and manage Organization Units
- Add or remove employees
- Assign and modify learning

Create and Manage Organization Units

As the Operational Administrator, you use the Organization manager to set up and manage Organization Units.




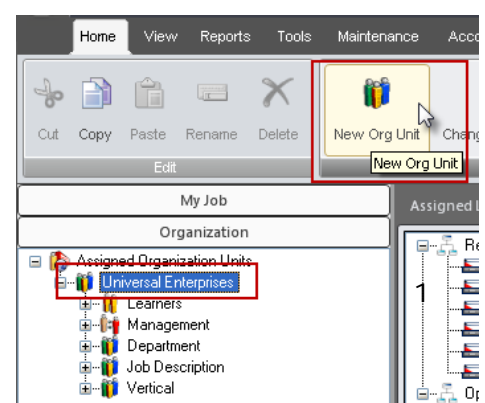
Org Units are made up of a group of employees who are assigned the same or similar learning. Employees may be in more than one Org Unit, and Org Units may have more than one Process assigned to them. Using the Organization manager, you can replicate your company's organization structure in a hierarchical tree. You can also create Org Units of employees with common assigned learning outside the company hierarchy.

Within an Org Unit, employees are categorized as Learners and Management:

- **Learners** - have learning access to Processes assigned to that Org Unit;
- **Management** - have access to supervise, assign learning, or report functions for employees or Org Units as Processes are learned.

To create a new Org Unit:

1. Open the Organization manager and click on an existing Org Unit, then click the **New Org Unit** button in the Ribbon.
2. A new object will appear under your currently selected location  **New Organization Unit**; re-name and save the object.



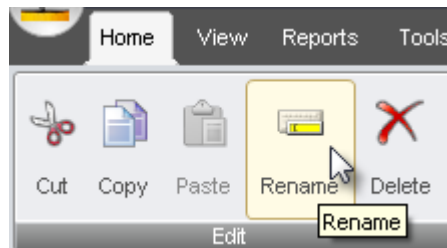


Initially, the new Org Unit will appear at the bottom of the list, but later it will display in alphabetical order.

Rename, Move, or Delete Organization Units

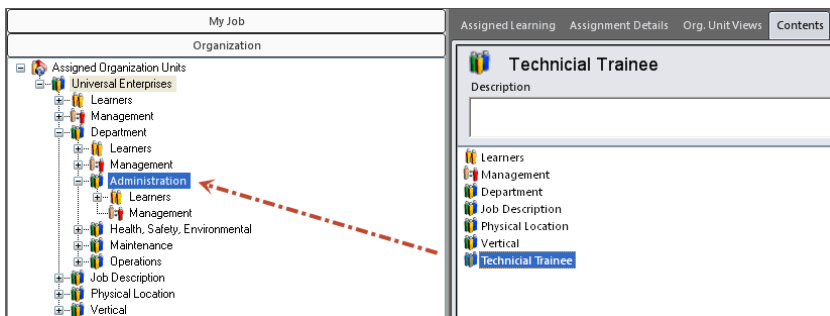
Use common key functions to rename, move, or delete Org Units.

To rename Org Units, click on the Org Unit name to select it then click the **Rename** button in the Ribbon and enter the new name.

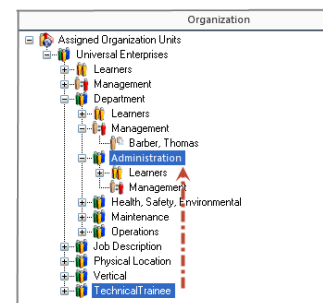


Use the drag and drop functions to move Org Units.

In the left example below, the Technical Trainee Organization Unit is dragged from the Contents window into the "Administration" Org Unit in the Org Unit tree. In the example on the right, the Technical Trainee Unit is dragged up to the "Administration" Org Unit within the Org Unit tree.



Org Unit moved between windows.



Org Unit moved in a window.



To delete an Org Unit, select the Org Unit then click the Delete button  in the Ribbon.

Note: This action will remove assigned Learning and the placement of employees, but it will not affect any learning records or employee details.

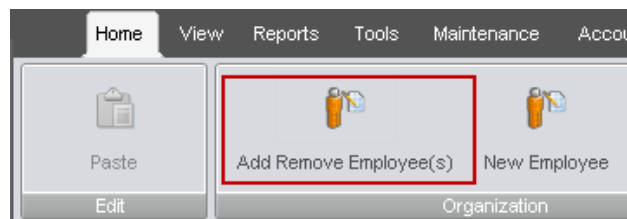


Add or Remove Employees

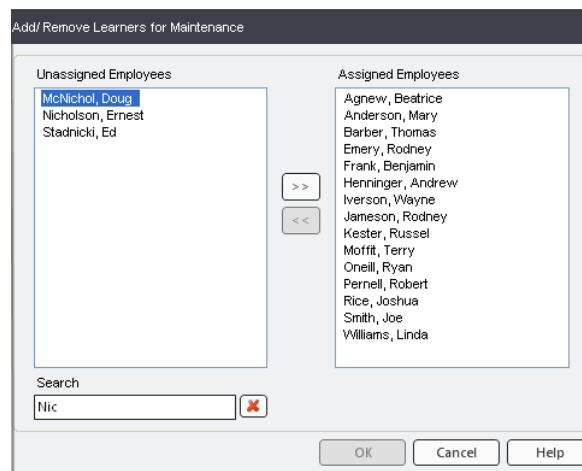
As an Operational Administrator, you will be able to add or remove employees in the TRACCESS system.

To add or remove a Learner:

1. Select the Learner node in the Organization manager then click the **Add/Remove Employee(s)** button in the Ribbon.

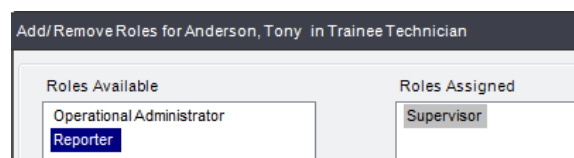


2. In the Add/Remove Learners dialog box that opens, type part of the person's name in the Search field to refine the Unassigned Employees list. To add an employee, select names from the Unassigned Employees list on the left and click the **Add** button . To remove a person from the list, select names from the Assigned Employees list on the right hand side and click the **Remove** button .



3. Click **OK**. The employee is now added as a Learner to the selected Org Unit.

Follow the same steps to modify the list of employees in the Management node; however, after you select the Add button an additional dialog box will open. There you define the Management employee's role because a Supervisor can also have Operational Administrator and Reporter roles.





Assign Learning

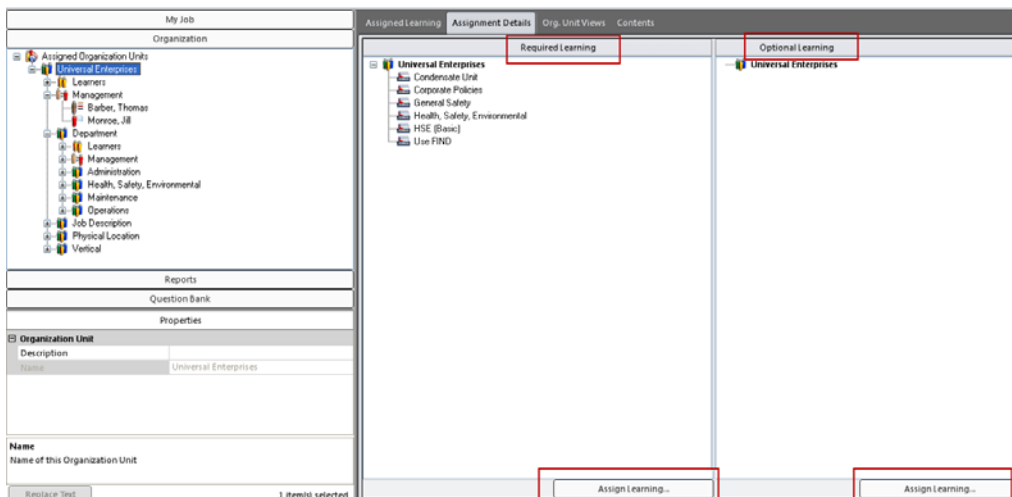
Learning is usually assigned at the highest Process level, with a complete Process (consisting of multiple Tasks laid out in rows of Sub-Processes) being applied to an Org Unit. That initial assignment can then be modified in three ways:

- Tasks can be hidden for all people in an Org Unit. For example, Confined Space Entry may not be required for an Administrative Org Unit.
- Tasks can be hidden for an individual Learner in an Org Unit. For example, only 4 out of 6 Learners need to complete the full Confined Space Entry course.
- A Task can be explicitly assigned to a particular Learner. For example, one employee will be trained in a particular incident investigation technique.

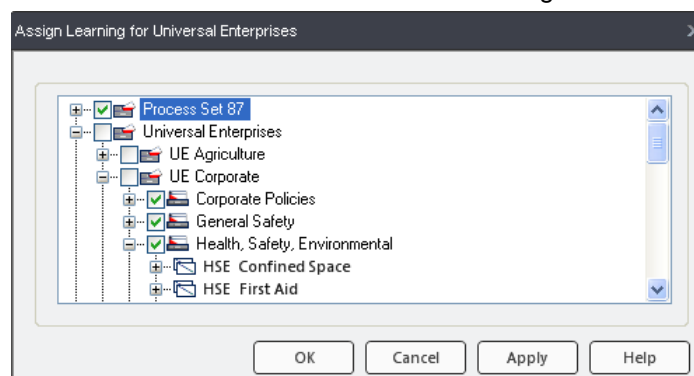
Assign Processes to an Organization Unit

To assign a Process to an Organizational Unit:

1. Open the Organization Manager and select the Org Unit.
2. In the Assignment Details tab, select **Assign Learning** from either the Required Learning or Optional Learning panes.



3. In the Assign Learning dialog box that opens, check the Process Sets or Processes assigned to that Org Unit. If some Processes are greyed out, they have been assigned at a higher level in the Organization structure and cannot be deselected at the Org Unit level.



4. Select all the Processes or Process Sets needed, click **Apply**, then **OK**. The Processes are now added as learning to all Learners in the Org Unit.



Assign Learning to Learners

When learning is assigned, it appears in a Learner's My Job tree. Learning can be assigned and structured as either Required or Optional Learning:

Required Learning:

- Knowledge and capabilities employees must have to safely and effectively perform their job.
- Statistics from Required Learning are available in the *My Job Summary*, *My Job* and *My Employees Charts*, and multiple other reports.

Optional Learning:

- Knowledge and capabilities not required in employee's current job.
- Statistics are included in some reports.
- If no optional Learning is assigned, the node will not appear in the *My Job* tree.

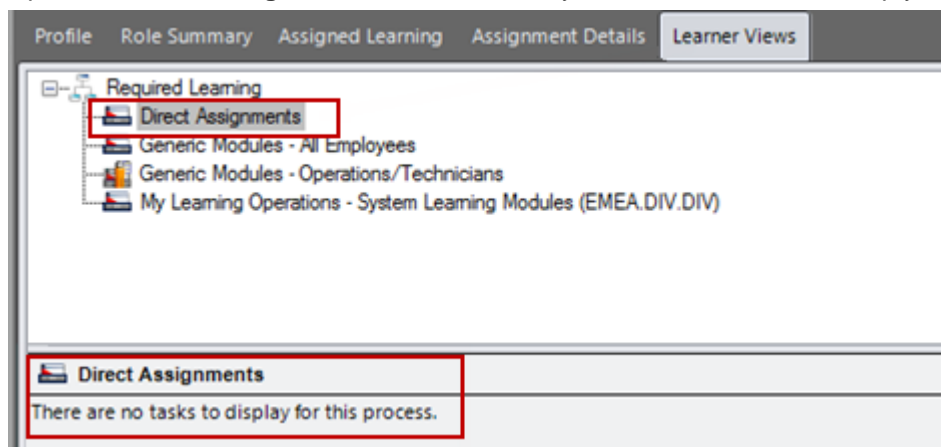
Completed Optional learning can be seen in the Required learning category so an employee would not need to complete the Task again if it became Required learning.

Assigning One Task to a Learner

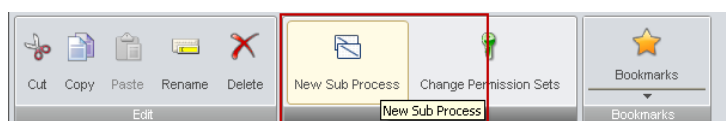
In some situations, a Learner may be assigned a unique Task such as a particular language skill or managing a specific project or Task. Use the Direct Assignments feature to assign that Task. Any Direct Assignment Task will be available in reports, charts, and summaries, and is considered Required Learning.

To set a Direct Assignment for a Learner:

1. Select a Learner and click the **Learner Views** tab.
2. Open the **Direct Assignments** Process. Initially, the view will show as empty.



3. Click the **New Sub-Process** button in the Ribbon and enter a name for the Direct Assignment Process.





4. Choose **Add/Remove Tasks** in the Ribbon. All available Tasks in the system will now be listed.
5. Select one or more Tasks then click **OK**. The selected Task(s) will now be visible to the Learner and to those with a Management role for that Learner. The Tasks appear under a Direct Assignments Process.

Direct Assignments				
MS Office Advanced	Working with Longer Documents in Word	Working with Pivot Tables and Charts in Excel	Working with Tasks and Notes in Outlook	Working with the Slide Layout and Themes in PowerPoint

Modify Assigned Learning

To ensure assigned learning is relevant and current, the Operational Administrator modifies learning for Org Units and individual Learners. The steps for modifying Tasks for an Org Unit and for a Learner are similar.

To remove Tasks from an Org Unit:

1. Select the Org Unit and then click the **Org Unit Views** tab.
2. Highlight the Process that contains the Task(s) that are not required for that Org Unit then choose the Task(s) to hide.
3. Select **Hide** from the Ribbon. (To restore a Task, select the Task and click **Show**.)

The screenshot shows the 'Assigned Learning' interface with the 'Org. Unit Views' tab selected. The tree view on the left shows 'Corporate Policies' selected. Below, a table lists tasks under various categories:

Corporate Policies		
Computer Training	COR Computer Orientation	COR Microsoft Excel
Common Practices	COR Cell Phone Use	COR Cold Weather Survival
Safety Certifications	COR Automated External Defibrillation	COR Fire Extinguisher Training
Communication	COR Conflict Management	COR Incident Management
Safety	COR Asbestos Hazards in Buildings	COR Ergonomics in the Workplace

A close-up of the ribbon shows the 'Home' tab with 'Org Unit Views' and 'Bookmarks' buttons. The 'Hide' and 'Show' buttons are highlighted with a red box.

When hidden, the Task still displays in the Org Unit Views tab, but as a faint icon. The icon used for the Process also changes to indicate there has been some modification to the assigned learning.



Corporate Policies		
Computer Training	COR Introduction to PCs	COR Microsoft Access
Common Practices	COR Cell Phone Use	COR Code of Conduct
Safety Certifications	COR Automated External Defibrillation	COR Defensive Driving
Communication	COR Conflict Management	COR Ethical and Moral Responsibilities
Safety	COR Asbestos Hazards in Buildings	COR Building Safety

The hidden Task does not display in the Learner's My Job or the Org Unit's Assigned Learning tabs. If all Tasks in the Sub-Process are hidden, the Sub-Process is not displayed either.

To remove Tasks for a Learner:

1. In the Learner node in the Organization tree, select the Learner and click the **Learner Views** tab.
2. In the Learner Views display, highlight and open the Process containing the Task(s) to modify.
3. Select the Task(s) to hide then select **Hide** in the Ribbon. (To restore a Task, select the Task and click **Show**.)

The hidden icon will show as a faint icon and the Process icon in the Learner View will change to show that the status of a Task has been changed. If all Tasks in the Sub-Process are hidden, the Sub-Process is not displayed either.

In this example the General Safety Process is selected and the SAF Noise Exposure Control Task is selected and will be hidden.

The screenshot shows the 'Learner Views' interface. On the left, the 'Organization' tree lists learners, with 'Barber, Thomas' selected. On the right, the 'General Safety' process is selected in the tree view. Below, the 'SAF Noise Exposure Control' task is highlighted in a blue box, indicating it is selected for modification.



When hiding Tasks be aware of these points:

- Tasks can only be hidden one at a time for an Org Unit or a Learner.
- A Task that is hidden in one context, but for some reason is visible in another, will remain visible to the Learner.
- Hidden Tasks will not be counted in any key performance indicator calculation, Status Summary, or Chart. For example, if the initial Process has 12 Tasks and 1 is hidden, the affected Learners will be assessed on 11 Tasks.
- Tasks assigned through Optional Learning cannot be hidden.
- For a List of all Org Units and Learners that have had one or more Tasks hidden, run the Org Unit Views and Learner Views reports respectively.

This completes the review of the main system functions that an Operational Administrator uses in TRACCESS CI.