



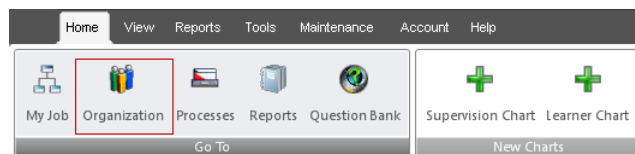
Manage Assigned Learning

This Quick Reference Guide reviews key TRACCESS CI functions that you perform as a Supervisor:


- View your Learners' assigned learning and completion statuses
- Set Task priority
- Set qualification dates
- Complete Capability Assessments
- View Task history

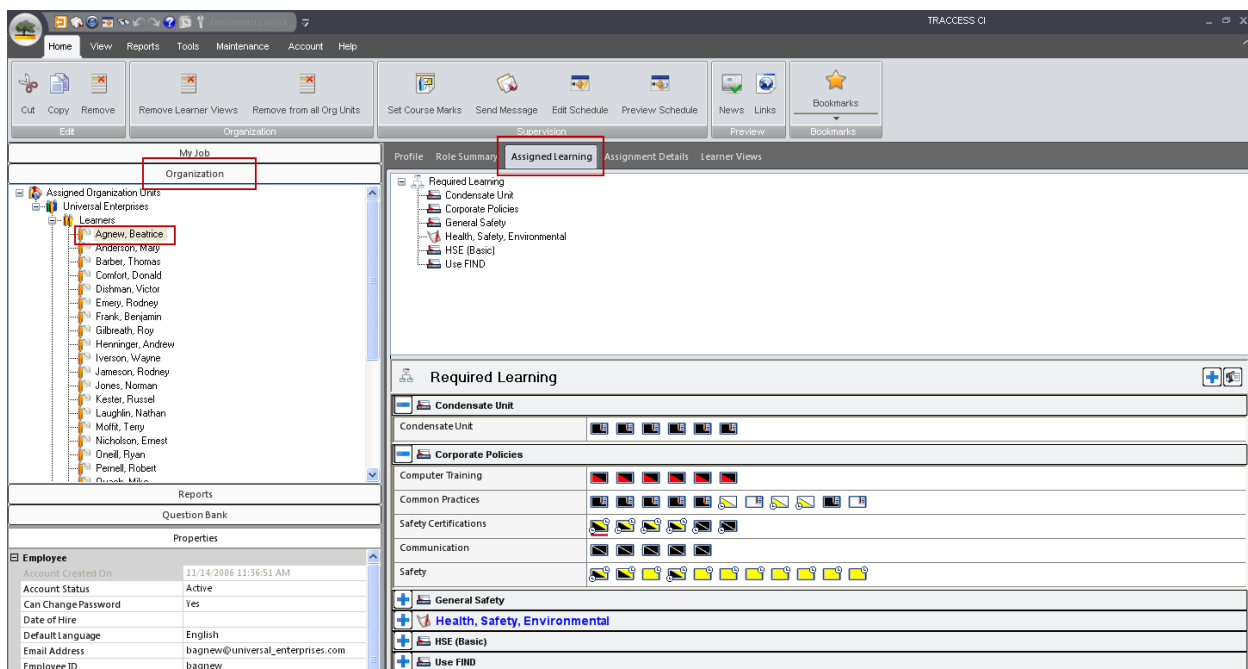
View Your Learners' Assigned Learning and Completion Statuses

As a Supervisor in TRACCESS CI, you have access to the Organization manager, which displays the Organization Units and Learners that you supervise.



Expand an Org Unit in the Organization manager, and then expand the Learners node. Click on a Learner's name, and select the **Assigned Learning** tab in the context view. Click the

Expand/Collapse button  to expand the grid view of all Required Learning. The Task icon colors indicate the statuses of all assigned learning.



Expand/Collapse Icon

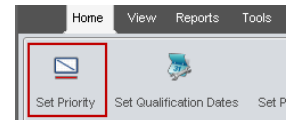


Set Task Priority

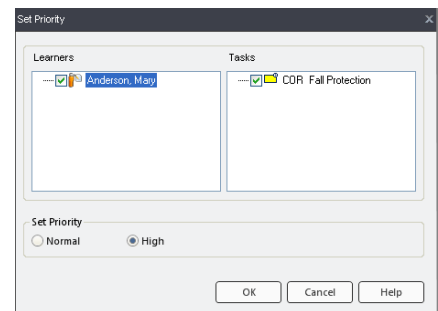
You can mark Tasks, Sub Processes, and Processes as High Priority for one or more Learners or Org Units. High Priority learning can be used as filters in reports and will also be highlighted in the Learner's **My Job Summary**.


Setting Learner Task Priority

To perform this function for a Learner, click on the employee's name in the Org manager. In the **Required Learning** tree, right-click on the Process/Sub Process/Task chosen for the prioritization. Then click the **Set Priority** button in the Ribbon.



That action will open a dialog box with the selected Learner and the Process/Sub Process/Tasks displayed in separate panes. Click **High** to set the priority, then **OK** to save the change.

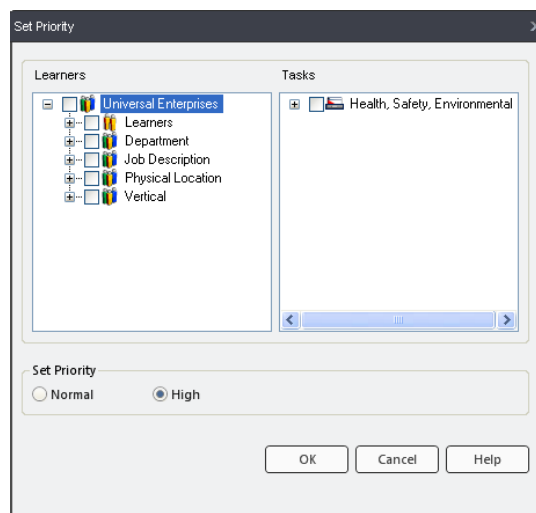


The Task will be identified as high priority by a red line under the Task icon .

Setting Organization Unit Task Priority

To mark a Task or Tasks as High Priority for multiple Learners, select the Org Unit's name. In the **Required Learning** tree, right-click on the Process/Sub Process/Task chosen for the prioritization. Then click the **Set Priority** button in the Ribbon.

The Set Priority dialog box will open. In the first panel, check the Org Unit for assigned learning. Expand the Org Unit if you need to select a subset of Learners. In the second panel, choose the Process/Sub Process/Task for the priority. Click **High** then **OK**.





Set Qualification Dates

You can set qualification dates for a Learner, multiple Learners, or an Org Unit(s) for any of their assigned learning.

First, click on the Learner(s) or Organization Unit(s) you want to set qualification dates for, click on the **Assigned Learning** tab, and then right-click on the selected Process/Sub Process/Task. Click on the **Set Qualification Dates** button in the Ribbon, then select **Set Qualification Dates**. A dialog box opens with the selected Learners/Org Units and Tasks displayed in separate panes.

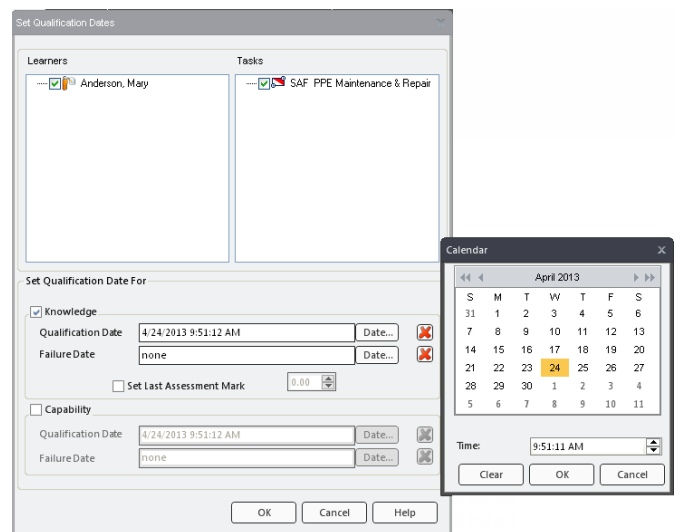
You will have slightly different options depending on whether you have planned to assess one Learner and one Task, or multiple Learners and/or Tasks.

Setting Qualification Dates for One Learner and Task

When you choose one Learner and one Task, the Learner and Task will be displayed with checkmarks in the Set Qualification Dates dialog box. Select the type of assessment assigned to that task, either Knowledge, Capability, or both.

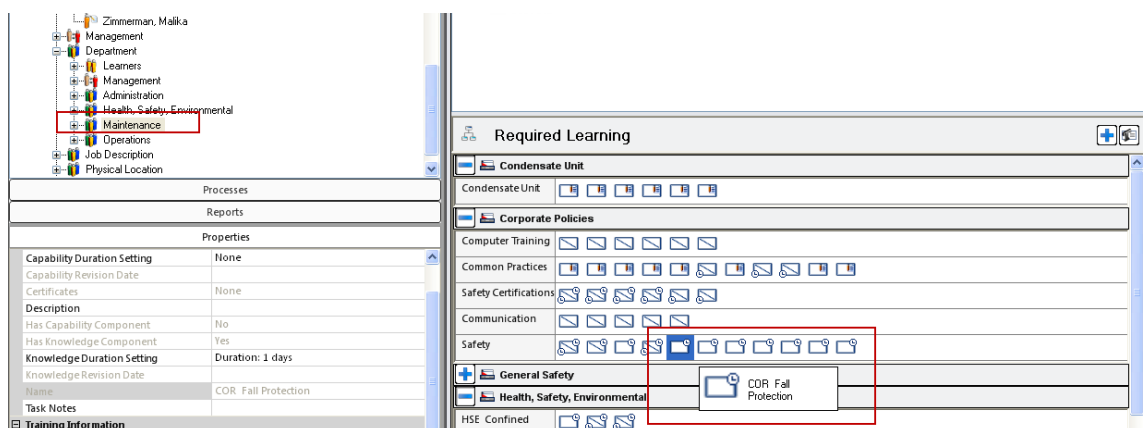
To set the Qualification Date, either accept the current date/time as displayed or use the Calendar dialog box that appears to select/input other dates and times.

After you click OK to save your selections, the updated status for that Learner is displayed in the Assigned Learning view.



Setting Qualification Dates for Multiple Learners or Tasks

To set qualification dates for multiple Learners or Tasks, select the Org Unit in the Organization manager. In the **Assigned Learning** tree, select then right-click on the selected Process, Sub-task, or Task.

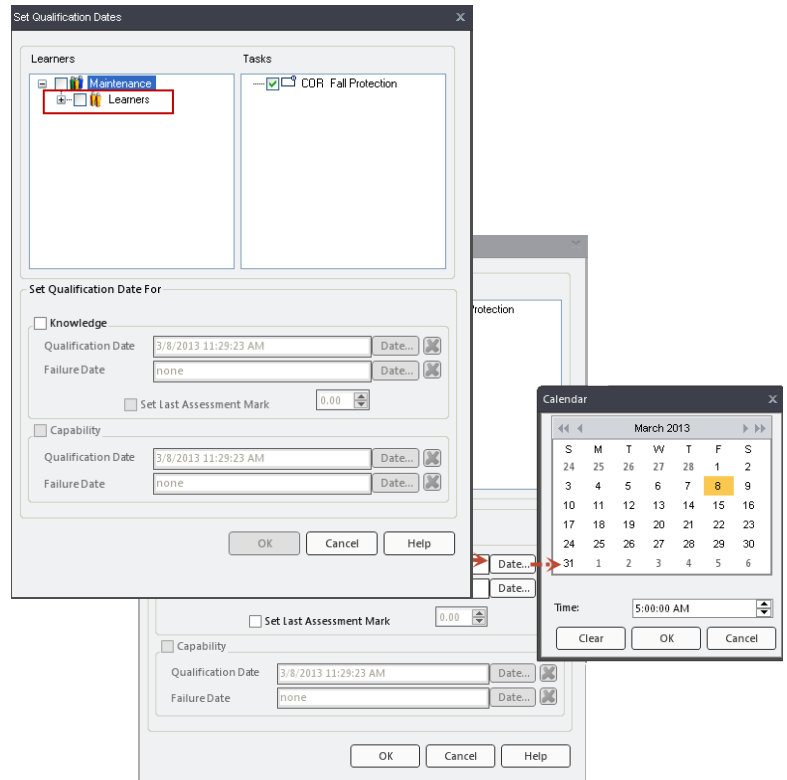




The Set Qualification option will appear in the right-click menu. Click **Set Qualification** to open the Set Qualification Dates dialog box with the selected group and Process/Sub Process/Task.

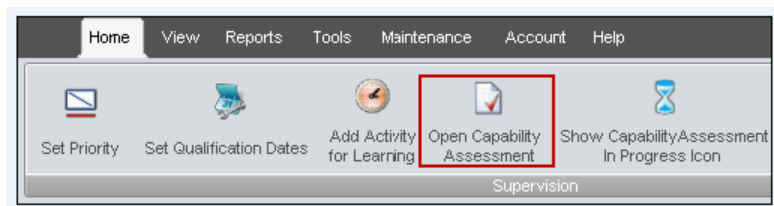
Expand the Learner or Task groups to select subsets as needed. Then select the Knowledge and/or Capability qualification and accept the displayed Qualification Date and time or use the Calendar to help input that data.

Note that when working with Org Units, the Assigned Learning window will not display the changed icon colours. Select an individual Learner to see the update results.



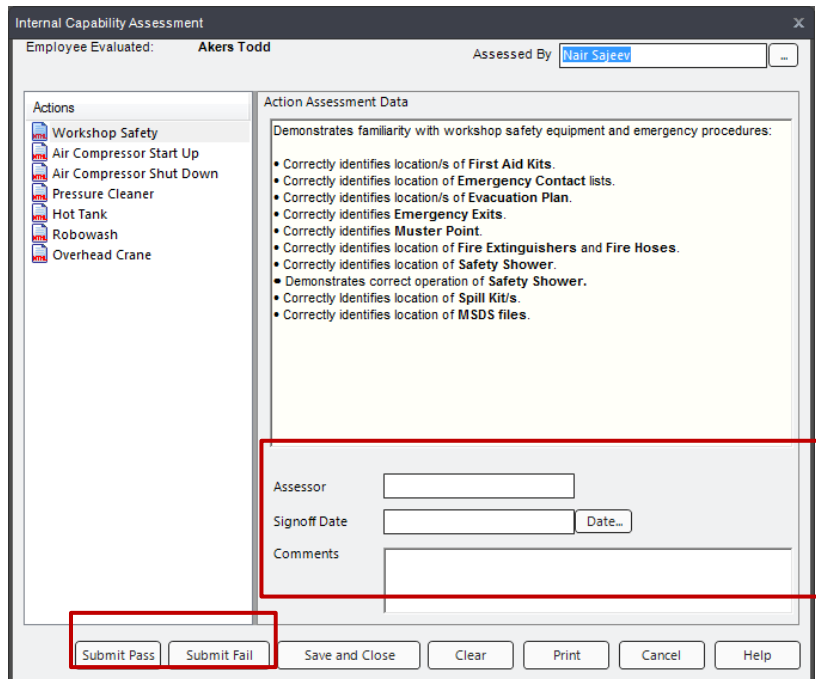
Complete Capability Assessments

Some Tasks may have a Capability component that needs to be signed off by an Assessor. As a Supervisor, you may have assessor responsibilities. To complete a Capability Assessment, in the Organization window click on the Learner you are to assess and in the **Assigned Learning** tree open the Task to be assessed. Then select **Open Capability Assessment** in the Ribbon.

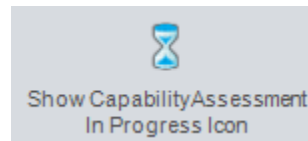


The Internal Capability Assessment dialog box will open. Observe the Learner demonstrating the required capabilities that are listed the Action Assessment Data. Then, to complete the sign off for the Task, enter your name, the date, and any comments or coaching feedback at the bottom of the Internal Capability Assessment dialog box.

Finally, select **Submit Pass** or **Submit Fail** to set the Qualification or unsuccessful attempt date.

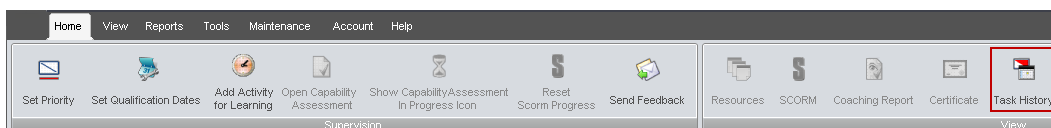


If you save the assessment without signing off on all the Actions, the **Show Capability in Progress** icon will appear on the Task folder. That icon will disappear when the Capability Assessment is complete.



View Task History

The Task History provides a complete history of activities related to a Learner's Task. To view a Task History, click **Task History** in the Ribbon, then choose **View Task History**. The current state of the Task will be displayed first in the list.



Ribbon with Task History icon

In the Task History, click **View** to see items that have been uploaded to support completed competencies. To attach documentation such as certificates or tests, click **Upload** then select the item to be uploaded and saved as evidence of completion.



Task History

Employee: Anderson, Mary
Task: COR Microsoft PowerPoint

Reason	K	C	Date	F
This is the current state of the ta...	x	x	3/8/2013 12:58 PM	3
Capability Revised	x	x	2/1/2012 1:20 PM	2
Knowledge Qualification Date S...	x	x	12/23/2011 10:17 ...	1
Capability Qualification Date Set...	x	x	12/22/2011 11:10 ...	1
Knowledge Qualification Date S...	x	x	12/22/2011 10:24 ...	1

Details | Comments

Knowledge

Status: Complete
Qualification Date: Thursday, December 22, 2011 10:24 AM
Assessor: Monroe, Jill
Assessor Employee ID: admin
Assessor Employee Number: N/A
Final Assessment Mark: 0.00
Duration Setting: None
Revision Date: N/A
Attempts: 0
CI Knowledge Assessment: [View...](#)

Capability

Status: Complete
Qualification Date: Thursday, December 22, 2011 11:10 AM
Assessor: Monroe, Jill
Assessor Employee ID: admin
Assessor Employee Number: N/A
Duration Setting: None
Revision Date: N/A
Attempts: 0
CI Capability Assessment: [View...](#)

Signature

Signer: Bliemel, Jeanette
Signer Employee ID: jbliemel
Signature Type: Implicit
Date/Time: 12/22/2011 11:11 AM
Meaning: Qualification Set Manually
Record Status: OK

Attached File: [Upload](#) [View](#) [Delete](#)

[Close](#) [Help](#)

This completes the review of the main TRACCESS CI functions you will use to supervise the Learners in your assigned Organization Unit(s).